3. Survey: Profile of the Industry

The following section provides a summary of the results from the survey that provides a profile of the cultural sector in Niagara. Although the survey yielded a reasonable response rate and the survey sample is considered statistically significant overall, there may be some areas in the region or segments of the cultural sector that are under-represented. Therefore, while the results presented in this section provide insights on the shape and structure of the cultural sector in Niagara (e.g., possible comparisons of cities/towns, key characteristics of the freelance/independent artist sector and characteristics of the sector in terms of employment, etc.) there may be some inconsistencies due to the under-representation of certain segments. For this reason, the information presented here should be viewed strictly as results of the survey.[24]

3.1 Summary of Survey Results

The survey results presented in this section provide a 'snapshot' of the shape and structure of Niagara's cultural sector. As indicated previously, although the survey yielded a reasonable response rate and the topline margin of error (at a 90% confidence interval) was relatively low, there may be some areas in the region or segments of the cultural sector that are under-represented. These results offer important insights about the profile and organization of the cultural sector in Niagara.

Some of the many highlights from the survey include:

- Total number of respondents: 225;
- Largest municipal response rate: St. Catharines;
- Almost half of all survey respondents were a businesses or organization while the next largest group (37%) were freelance/independent artists;
- Almost half of all responding organizations or businesses operated in more than one municipality in the region;
- The largest portion of responding businesses and organizations reported an operating income of less than $20,000;
- An average of 34.65% of a freelancer's total personal income comes from his/her work as a freelancer;

[24] Due to the small sample size, any claims made on the basis of this data may over- or under-state the reality in Niagara and therefore guides our discretion in presenting survey data only at face value.

- The biggest limiting factor to the cultural sector in Niagara cited by respondents was access to funding; and,
- Freelance artists tend to operate more frequently in rural communities whereas cultural businesses and organizations tend to operate more frequently in the urban areas of the region. Freelancers are not subject to the same restrictions and access to suppliers and markets as a business or organization might face.

3.2 Survey Respondent Profile

This subsection provides a summary profile of who responded to the survey.

Of the 225 responses received, the largest overall response rate came from the municipalities of St. Catharines (92 responses) and Niagara Falls (32 responses), which may reflect where the bulk of cultural activity is taking place in Niagara. A more complete representation of the distribution of responses across Niagara's 12 municipalities is given in Figure 2.

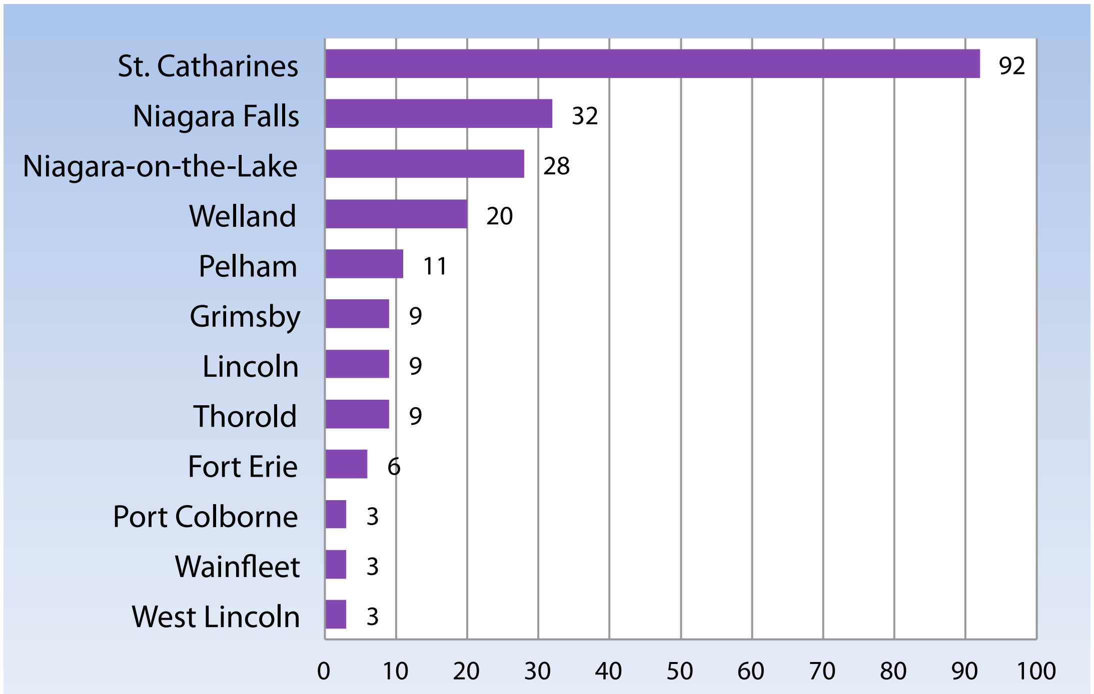
Several definitions of terms used in the survey may be helpful in understanding the results of the survey. These terms (taken from survey instructions) are:

"Last Fiscal Year" - This term refers to the last complete year for which the organization has filed taxes. For most, the fiscal year will end on December 31st or March 31st -- making the last fiscal year January 1, 2011 to December 31st, 2011 OR April 1st 2011 to March 31st 2012.

"Operating Income" - This term refers to the gross amount that the company or organization received from any source (before any costs of doing business, expenses, taxes, debt repayments, etc. are accounted for).

"Operating Expenses" - These are any expenditures that the company or organization made in the process of conducting its daily operations. Note that this does not include losses from investments or other assets.

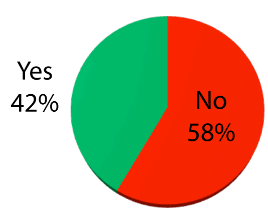
Figure 2: Total of Survey Respondents by Municipality



Source: Nordicity online data collection tool; n=225

There is also a certain amount of mobility of goods and services across the municipalities in the region. Indeed, as the chart in Figure 3 illustrates, almost half (42%) of respondents to the survey (regardless of type of respondent) indicated that they operate in other municipalities in the region beyond the one in which their primary operations are located.

Figure 3: Respondents Operating in Other Municipalities



Source: Nordicity online data collection tool; n=219

Of those respondents that answered 'Yes' to operating in other municipalities, the table below illustrates how many other municipalities they operate in. For example, 29 respondents say that, **in addition** to their primary municipality, they operate in two to four other municipalities.

Table 1: Additional Municipalities

Number of Additional Municipalities	Respondent Total (Frequency)
One	10
Two to Four	29
Five to Eight	28
Nine or more	22

Source: Nordicity online data collection tool; n=89

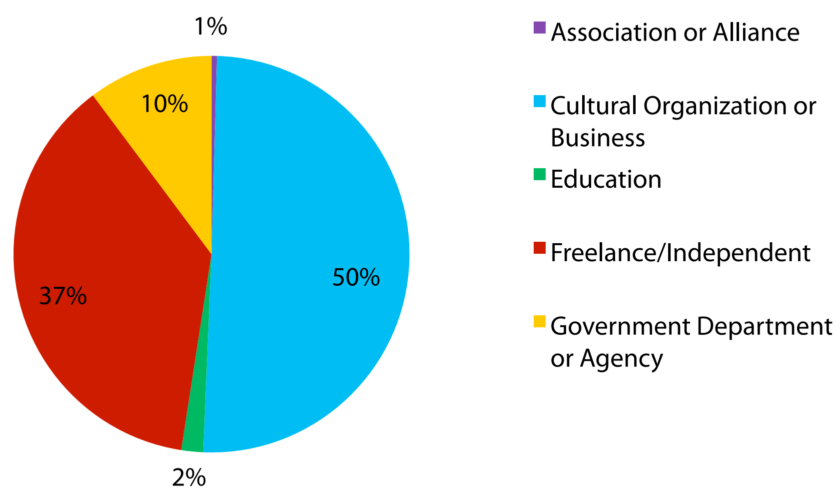
Note: The respondent total (frequency) does not sum to 42% of 'Yes' respondents in Figure 3. In response to the question whether they operated in other municipalities, not all respondents specified the number of other municipalities in which they operated.

Respondents to the survey were categorized into five groups based on the perspective from which they were responding to the survey. Respondents could only select one option to identify what type of respondent they represented when completing the survey, and their response to that question was linked to key survey logic so that only questions relevant to that type of respondent were presented. The five types of respondents included in the structure of the survey are:

- Cultural Organization or Business;
- Independent artist or freelance professional (responding on their own behalf) ("Freelance/Independent");
- Industry Association or Alliance ("Association or Alliance");
- University or college department, or a specialized industry training institution ("Education"); and,
- Government Department or Agency.

Overall, 50% of all respondents were responding on behalf of a cultural organization or business, with the next largest respondent category being freelance/independent artists at 37%. Below is a pie chart demonstrating the distribution of all survey respondent types.

Figure 4: Survey Respondent Types



Source: Nordicity online data collection tool; n=225

The survey also asked respondents to identify which segment of the cultural sector best represents their primary area of activity. Segments included:

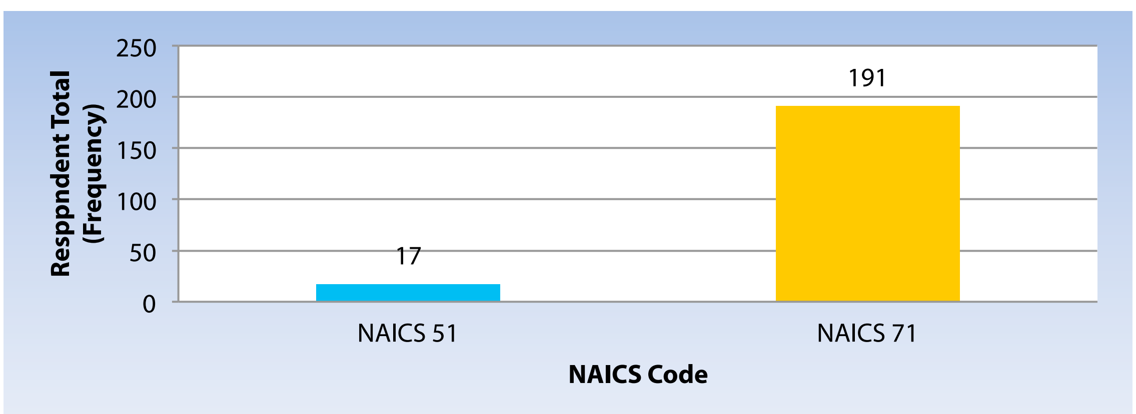
- Heritage
- Libraries and Archives
- Museums and Galleries
- Visual Arts
- Crafts and Artisanal Production
- Applied Arts
- Live Performing Arts
- Festivals, Events and Cultural Celebrations
- Writing and Publishing
- Audiovisual and Digital Media
- Music and Sound Recording
- Sports and Recreation
- Community Cultural Organizations and Societies
- Other

These segments were then mapped to NAICS categories.

As the figure below illustrates, there was quite an uneven distribution of survey respondents across the various segments or 'NAICS codes'. The vast majority of respondents were in the NAICS 71 category (Arts, Entertainment and Recreation), whereas NAICS 51 (Information and Cultural Industries) was severely under-represented in the survey. For example, according to data from Niagara Economic Development, in 2010 there were a total of 718 cultural businesses and organizations in Niagara, with 486 in NAICS 71 and 232 in NAICS 51. Given that there was a low response rate to the survey for NAICS 51, these survey responses were not used in the economic impact analysis since the results would be too weak. The response rate from the survey for NAICS 71 was stronger and these results were therefore used as part of the economic impact analysis. The NAICS 71 (Arts, Entertainment and Recreation) category also included all 84 freelance and independent professionals responding to the survey.

The relative under-representation of NAICS 51 (Information and Cultural Services) largely contributes to Nordicity's reliance on secondary data, rather than survey data, for the economic impact analysis in Section 4 below. However, the survey data still provide interesting insights into the structure of the cultural sector in Niagara. Figure 5 shows the NAICS respondent totals.

Figure 5: Respondent Representivity, by NAICS Code



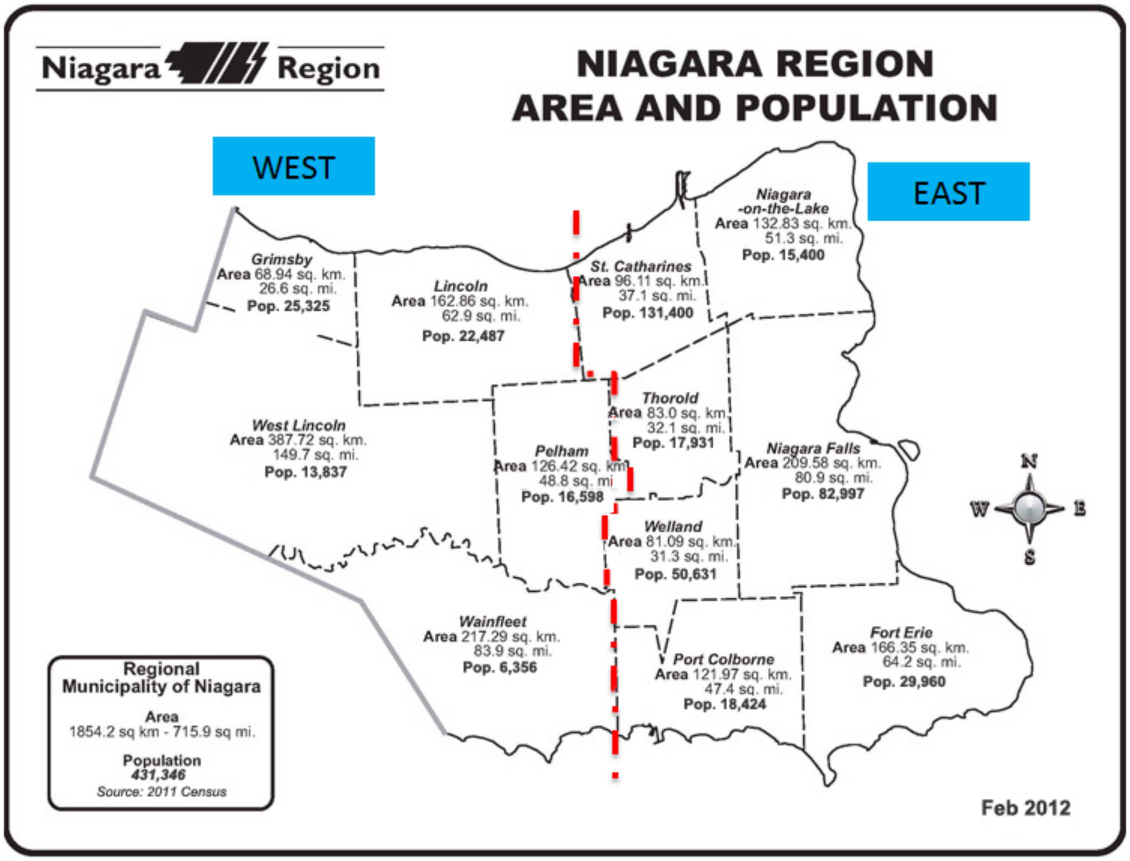
Source: Nordicity online data collection tool; n=208

3.2.1 Regional Breakouts of Respondents

The research team also conducted some analysis of responses by type and cluster. The analysis delineated cultural sector clusters by East-West and Rural-Urban.

The map below shows the division using a red division line between the Eastern (St. Catharines, Niagara-on-the-Lake, Thorold, Niagara Falls, Welland, Port Colborne and Fort Erie) and the Western areas (Grimsby, Lincoln, West Lincoln, Pelham and Wainfleet). It is important to note that further breakdown of respondents by municipality cannot be made due to low response rates in certain individual municipalities.

Figure 6: Niagara's East-West Delineation



Source: Niagara Region Website: Niagara Region Map, Area and Population.

The Eastern municipalities have the most respondents compared to the Western municipalities. There were no respondents for two of the respondent type categories in the Western municipalities (Educational institution and Association or Alliance). The proportions of respondent types are illustrated in the figures below. Over 50% of Eastern respondents were responding on behalf of a cultural organization or business.

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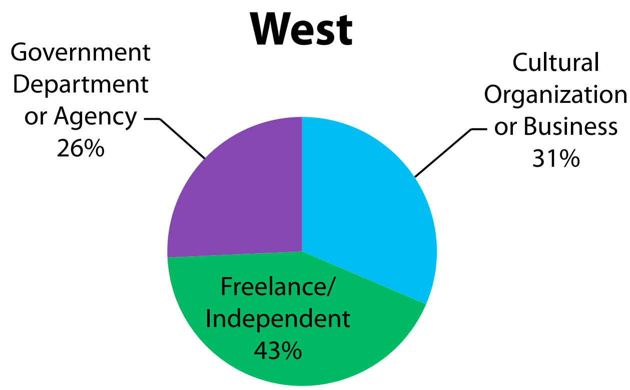
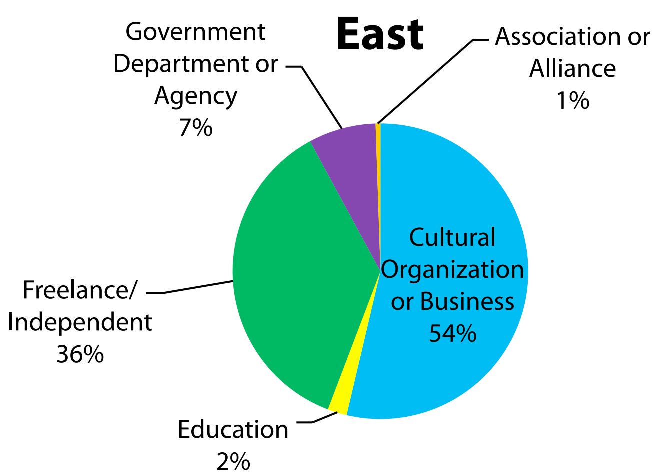
Figure 7: Respondent Categories (East-West)





Source: Nordicity online data collection tool; n=35 (West); n=190 (East)

The project team also conducted regional breakout analyses using a 'rural' vs. 'urban' categorization of municipalities, based on each municipality's designation within the Niagara's subdivision designation.[25] Municipalities categorized as cities are: Niagara Falls, Port Colborne, St. Catharines, Thorold and Welland. The following towns are designated as rural: Fort Erie, Grimsby, Lincoln, Niagara-on-the-Lake and Pelham. The townships are: Wainfleet and West Lincoln.

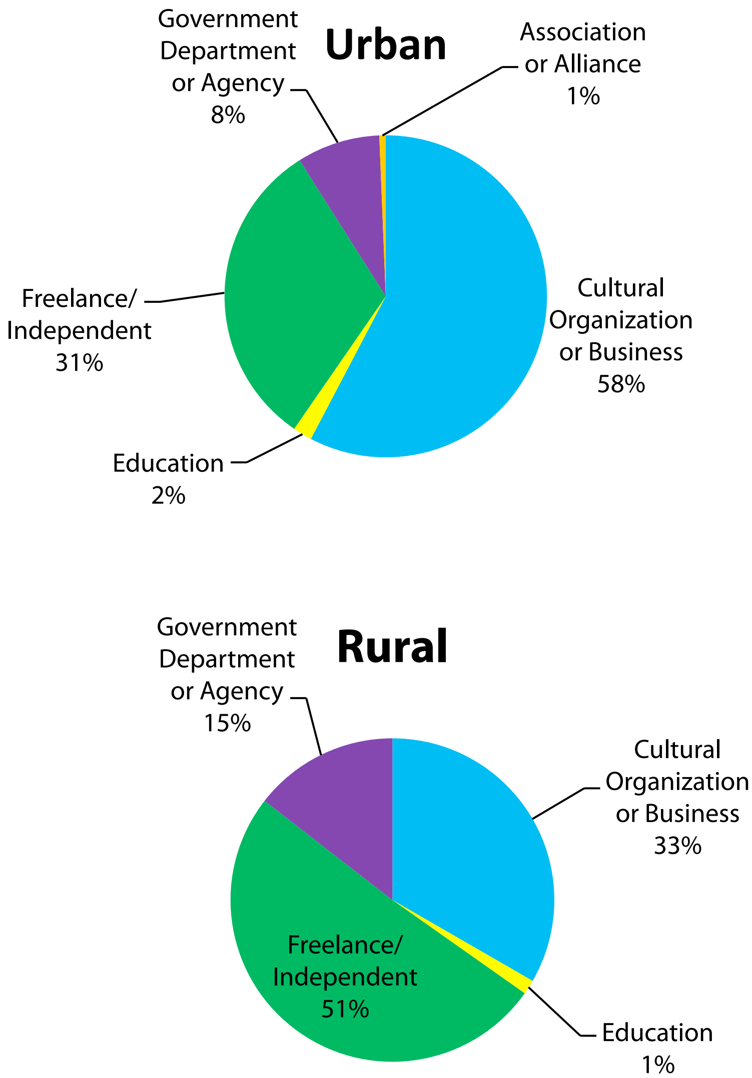
The respondent types for rural and urban municipalities are illustrated in Figure 8. Urban municipalities have the largest number of respondents (n=156) while also having the most respondents in every category of respondent types. These figures indicate that there is a higher concentration of cultural activity in the larger urban areas of Niagara.

Cultural organizations and/or businesses are located in urban areas (58%) more frequently than rural areas (33%), reflecting the general tendency for organizations and businesses to establish themselves in locations where they can have easy access to key suppliers and support businesses as well as other businesses and organizations with whom to collaborate. In addition, the urban centres offer access to a larger audience as they are in areas of population concentration for both residents and visitors.

On the other hand, there is a higher concentration of independent artists and freelancers in the rural municipalities (51%) compared to the urban municipalities (31%). These figures may indicate that freelancers are more mobile, working across multiple municipalities, and may not need to be located in urban centres. In addition, most freelancers or independent artists do not have a storefront but rather their own atelier/studios located in their own homes. The flexible and transportable nature of the freelance and independent artist's work means they are able to choose between the urban and rural areas without losing business or the ability to work effectively.

[25] Designations are: City, Town or Township. In our categorization, 'urban' includes all municipalities designated as cities while 'rural 'includes those designated as towns and townships. While somewhat arbitrary, this categorization is meant to assist in explaining differences in the nature of responses and response rates found in the study. Municipalities may self-designate in this regard, and these designations do not always reflect common assumptions. The distinctions are not always evident, e.g., the Town of Fort Erie (designated as 'rural') has a much larger population than the City of Port Colborne (designated as 'urban').

Figure 8: Respondent Categories (Urban and Rural)

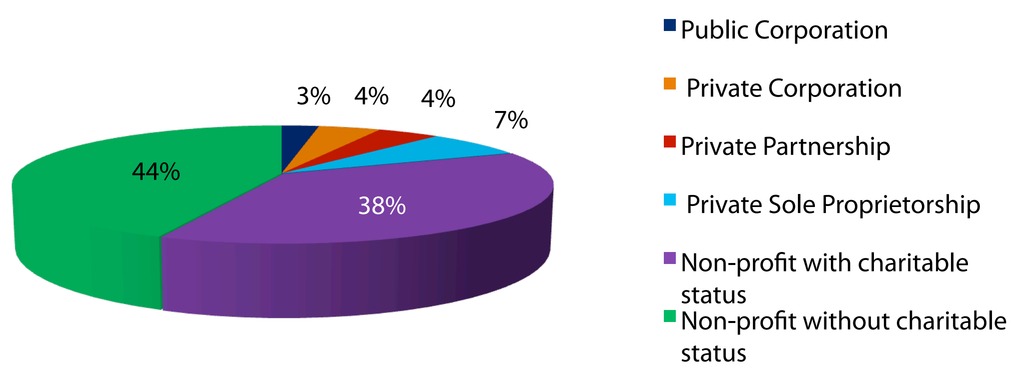


Source: Nordicity online data collection tool; n=156 (Urban); n=69 (Rural)

3.3 Cultural Organization or Business Profile

The cultural sector in Niagara is primarily composed of non-profit organizations (82% of respondent organizations/businesses), most of which do not have charitable status, as evidenced by the results presented in Figure 9, below. On the other hand, there are very few public corporations in Niagara's cultural sector.[26]

Figure 9: Organizational Structure of Cultural Business or Organization



Source: Nordicity online data collection tool; n=112

Respondent organizations were also asked to indicate the number of years that they have been in operation in the cultural sector in Niagara. The average age reported by organizations was 28 years (based on 112 responses to that question). This figure indicates that the cultural sector in Niagara is quite mature and established. These results also indicate

[26] As per the Canadian Revenue Agency and the Income Tax Act an organization can only register as a non-profit (non-charitable status) if it is (primarily):

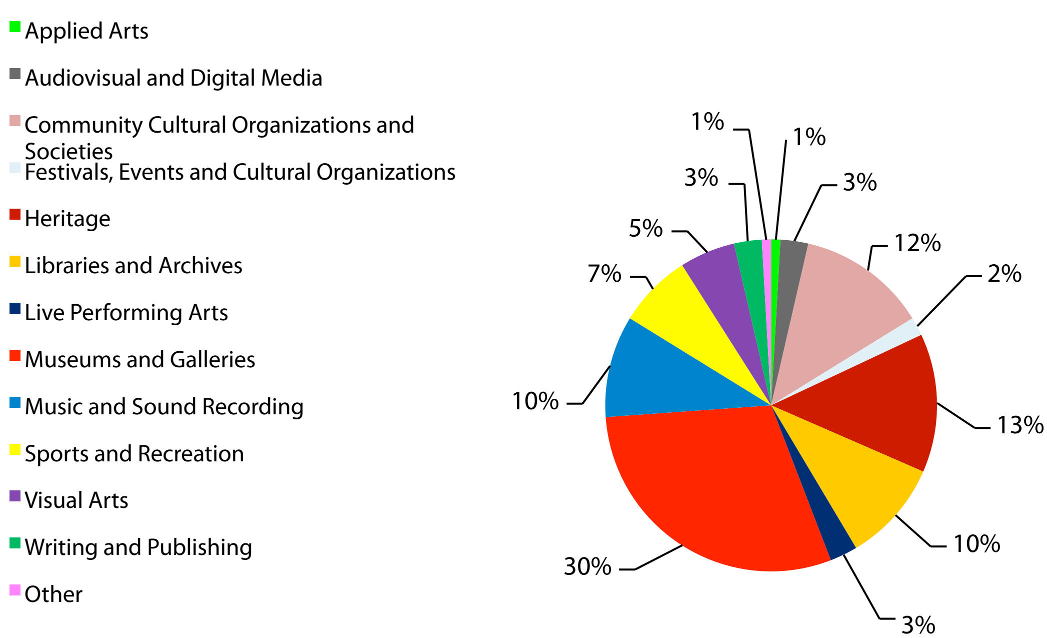
- "Organized exclusively for social welfare, civic improvement, pleasure, recreation or any other purpose except profit"
- "Does not distribute or otherwise make available for the personal benefit of a member any of its income unless the member is an association which has as its primary purpose and function the promotion of amateur athletics in Canada".

A non-profit can achieve charitable status if the organization either operates for "the relief of poverty", "the advancement of education", "the advancement of religion" or, "other purposes that benefit the community in a way that the law says is charitable". Frequently, cultural organizations do qualify as they are deemed to provide a benefit to the community, cultural education and teaching, etc.

that the sector is fairly stable and has proven itself to be relatively sustainable. That said, such a high average organizational age also indicates that there is little growth in the sector with very few new cultural organizations or businesses establishing themselves in the region.

With regard to which cultural sector segments are most active in Niagara, the figure below shows the primary cultural segments in which respondent organizations operate. The largest share of business and organization respondents identified their primary areas of activity were in "Museums and Galleries" and "Heritage", indicating that these segments are core components of Niagara's cultural sector.

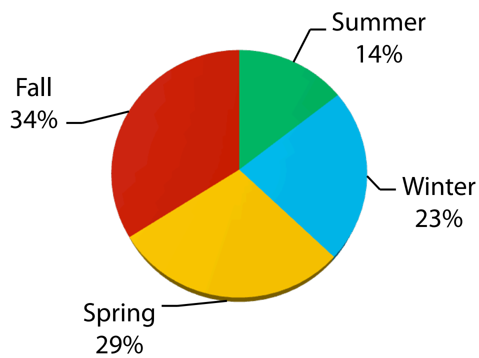
Figure 10: Business and Organization Primary Cultural Segment



Source: Nordicity online data collection tool; n=111

Many cultural businesses and organizations have a defined operating season. For example, many performing arts organizations operate on a seasonal basis where they only present their cultural offerings for a select period of time during the year and use the rest of the year for planning and production. Similarly, some sports or recreational organizations (such as outdoor water sports) are limited by seasonal weather patterns. In addition, many cultural businesses and organizations in Niagara only operate at full staffing levels during the tourist season, relying on a skeleton staff in the off season in order to better manage operating costs during times when they may not receive much demand for their products or services. Survey respondents in the business/organization category were asked to indicate whether or not they operate on a seasonal basis. In total, about one third of cultural organizations or businesses surveyed indicated that they follow an operating season. Of those, the majority operated in the fall and spring months, as illustrated in the chart below.[27] These results illustrate the strength of the industry as a potential destination in the fall and spring months. The mostly even distribution of the operating seasons (even the winter is almost a quarter of the 97 respondents) also shows an opportunity for making Niagara into a four-season destination.

Figure 11: Operating Season for Cultural Business or Organization



Source: Nordicity online data collection tool; n=97

The length of operating seasons varied greatly among respondent organizations. That said, the majority of organizations indicated that their operating season was somewhere between 9-10 months long, followed by 7-8 months and six months (see Table 2 below). Very few organizations indicated that they had an operating season of five months or less.

Table 2: Operating Season for Cultural Business or Organization

	Respondent Total (Frequency)
Less than one month	1
1-2 months	2
3-5 months	1
6 months	7
7-8 months	6
9-10 months	9

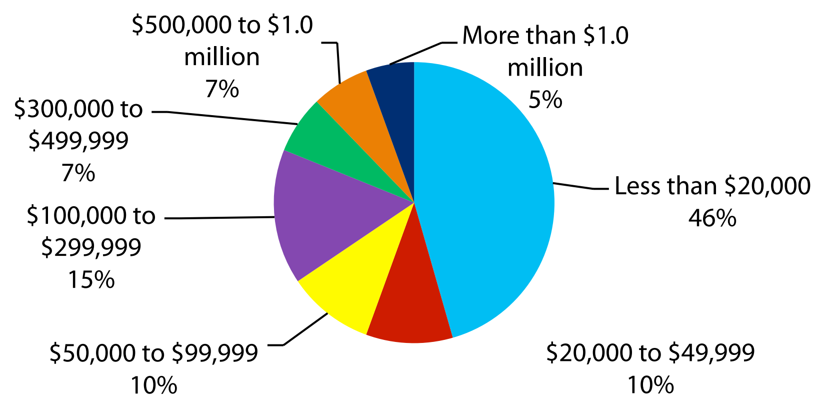
Source: Nordicity online data collection tool; n=26

[27] Please note that respondents could select more than one month, which means that there is likely some double counting.

3.3.1 Financial Profile of Cultural Businesses and Organizations[28]

Financial information was a significant part of the survey questionnaire and businesses and organizations gave detailed responses of their breakdown of income and expenses.[29] Two-thirds of respondent organizations or businesses had a total operating income of less than $100,000, the majority of which reported an income of less than $20,000 (46%), indicating that the cultural sector in Niagara is primarily composed of small- or micro-sized organizations (based on income). In most cases, organizations reported having expenses that roughly equate to their annual operating revenue, as illustrated in Figures 12 and 13, below. This alignment of operating expenses and income is consistent with the structure of most cultural organizations in Niagara, which are primarily non-profit organizations. The 46% of respondents operating in the less than $20,000 income bracket illustrate that many organizations are operating on very small budgets to offer their programs and services, which can have a number of implications. For example, many organizations indicated that they did not have any paid employees, meaning that their organizations rely entirely on volunteer human resources. This reality illustrates just how important volunteerism is to the survival and sustainability of Niagara's cultural sector.

Figure 12: Operating Income for Fiscal-Year (FYE) 2011[30]



[28] Please note that the figures presented in this section do not include figures for freelancers or individual artists.

[29] Note: The terminology used in the survey was 'income' since the survey also was administered to individuals who worked as freelancers and made an income rather than revenue. The term 'income' coincides with the standard Statistics Canada business income definition and therefore is more comprehensive than the use of 'revenues', given that 'income' also includes grants/subsidies, etc.

[30] Please note that this chart only represents results for cultural businesses and organizations and does not include data from freelancers and individual artists.

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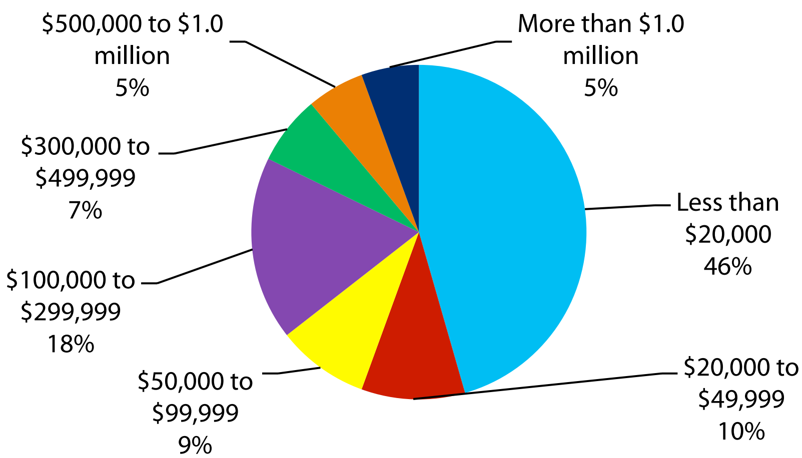
Source: Nordicity online data collection tool; n=90

Figure 13: Operating Expenses for FYE 2011

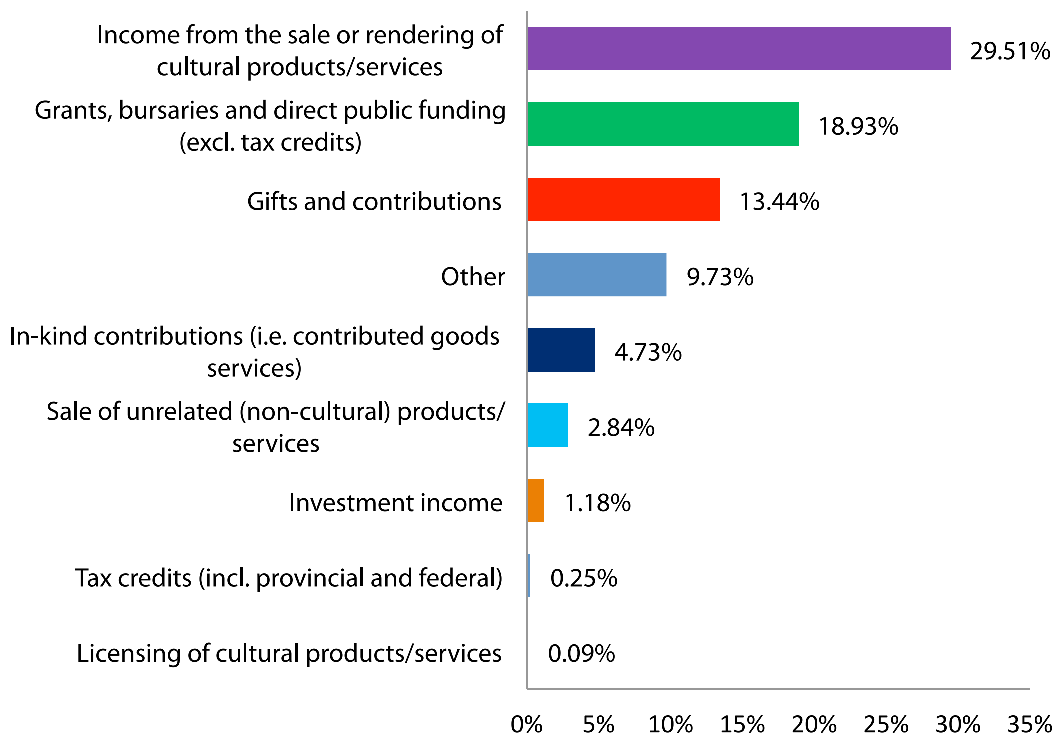


Source: Nordicity online data collection tool; n=90

The various sources of operating income for cultural businesses and organizations are illustrated in Figure 14 below. On average, the largest share (percentage) of income comes from the sale or rendering of cultural products or services (29.5%). The next highest average share (percentage) of income for businesses and organizations comes from 'grants, bursaries and direct public funding' (18.9%),[31] followed by 'gifts and contributions' (13.4%). These results indicate just how dependent cultural organizations and businesses in Niagara are on public funding and other sources of public and private contributions (e.g. donations, in-kind donations, corporate sponsorships, etc.). Public and private support is and will continue to be vital to the health and vibrancy of Niagara's cultural sector. Without these public funds, the Niagara cultural sector would be without almost a third (32.4%) of their operating income.

[31] Excluding tax credits.

Figure 14: Breakdown of Operating Income for Cultural Organizations or Businesses (average share of total operating income)



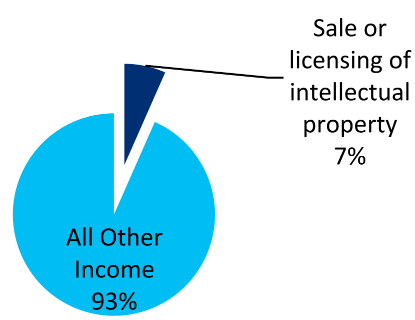
Source: Nordicity online data collection tool; mode n=102[32]
Note: % do not sum to 100% because the number of total respondents varied according to the specific category. Thus, % is calculated using different totals.

Licensing is an almost negligible source of income for cultural businesses and organizations in Niagara. Indeed, Figure 15 below shows the average proportion of income that business and organization respondents earn from the sale or licensing of intellectual property vis-à-vis all other sources of income. The sale and licensing of intellectual property contributes an average of 7% to the overall total operating income for cultural businesses and organizations in Niagara. These figures indicate that there might not be a great deal of original intellectual property being developed in the region.

[32] The mode is used when there is a difference in the number of respondents for each question. The mode uses only the most frequent number of complete responses to a particular question.

Earnings and investments in intellectual property is a commonly used KPI to describe an industry or sector's health, development and success. While intellectual property is an imperfect performance indicator for sectoral innovation, the survey asked respondents to estimate the income from sale and licensing of IP to determine how much income the sale of copyrights and other license fees and royalties may contribute to income. The 7% reported by cultural organizations is quite small compared to other industries such as engineering and agriculture, for example, where more activities in that sector may drive IP – like sale of design plans or plant chemicals/pesticides or modified seeds in the agricultural sector. It also indicates that the cultural sector in Niagara has a relatively small number of businesses that would typically produce high levels of intellectual property such as architectural firms and media and entertainment businesses.

Figure 15: Income from Sale and Licensing of Intellectual Property vs. All other income



Source: Nordicity online data collection tool; mode n=102

Respondent organizations were also asked to provide a breakdown of their operating expenses according to type of activity. As shown in the figure below, 'Wages, salaries and employee benefits'[33] constitutes the biggest expenditure for cultural businesses and organizations in Niagara, while the overhead costs for facilities represents the second largest portion of expenses (14.6% and 10.8%, respectively).

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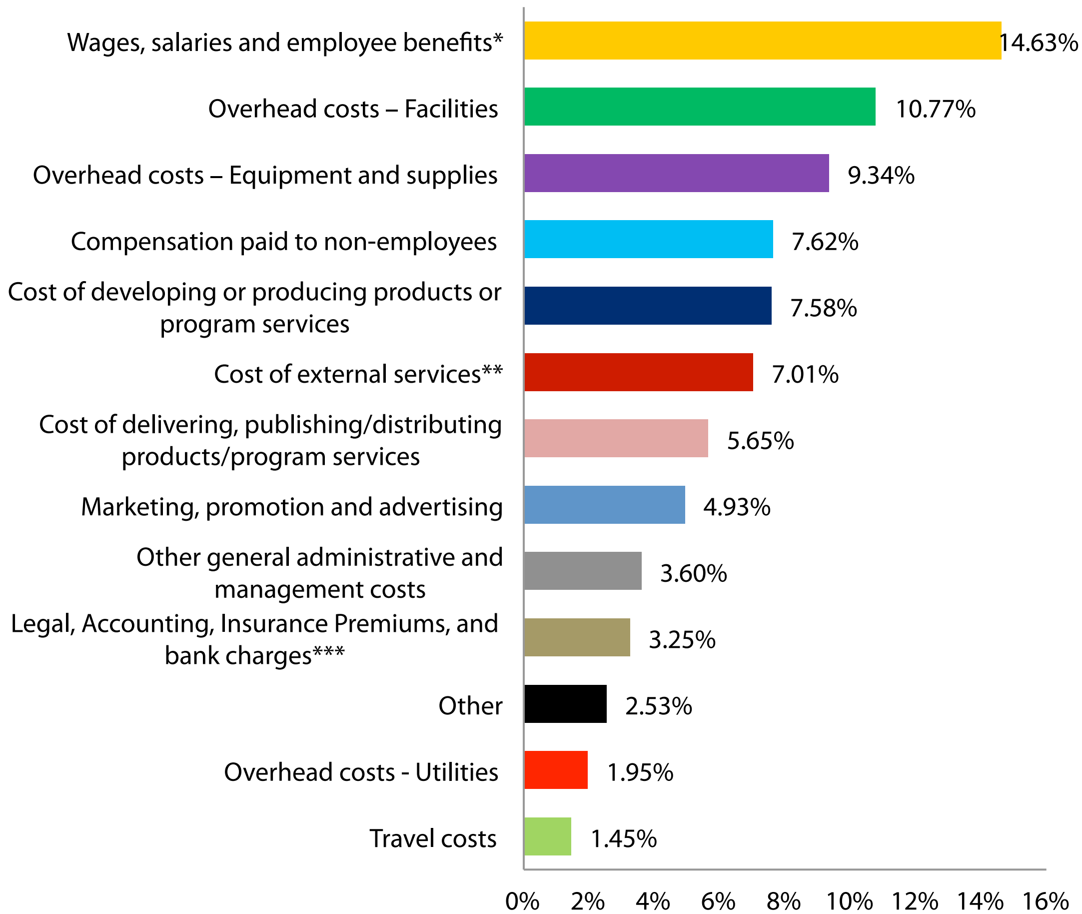
[33] Excluding fees paid to freelancers.

Figure 16: Breakdown of Operating Expenses for Cultural Organizations or Businesses (average share of total operating expenses)



*Excludes fees paid to freelancers
**E.g. outsourced professional, technical or program-related services
***Excluding interest payments

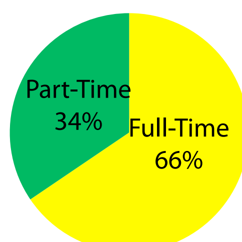
Source: Nordicity online data collection tool; mode n=102
Note: % do not sum to 100% because respondent totals vary across questions. Thus, % is calculated using different totals.

3.3.2 Profile of the Cultural Workforce

As discussed in the Economic Impact Analysis in Section 4, Niagara's cultural sector employs a total of almost 6,000 jobs, on the basis of the NAICS codes defined in Section 1.3 above.

Based on the responses provided to the survey, the majority of cultural workers in businesses and organizations appear to be employed on a full-time basis. The figure below shows the percentage of the survey workforce that is full-time and part-time. The percentages represent the total workforce reported; and therefore include seasonal, contract and permanent cultural and non-cultural workers. From the survey, 32 businesses reported they did not have any paid employees (including themselves). Almost 70% of the respondents who indicated that they did not have any paid employees were non-profits without charitable status and they were from all cultural segments. Once again, this figure indicates just how critical volunteerism is to the health and sustainability of cultural businesses and organizations in Niagara. It may also indicate that organizations are relying more heavily on freelance professionals who can complete work on an as-needed basis rather than maintaining a full or part-time workforce which requires significant overhead.

Figure 17: Percentage of workforce Full-time vs. Part-time (Cultural and Non-cultural workers)



Source: Nordicity online data collection tool; mode n=51

In addition, cultural businesses and organizations indicated that they employed approximately 203 independent or freelance professionals in a cultural occupation in 2011. Out of 50 businesses responding to this question, 35 answered that they did not employ any freelance professionals in 2011. In terms of employment of independent or freelance professionals for non-cultural occupations, out of the 51 cultural businesses and organizations who responded to this question, 47 answered that they did not employ any of these individuals, while four businesses indicated that they employed approximately 27 independent or freelance professionals in a non-cultural occupation in 2011.

The majority of the workforce - as reported by respondent businesses and organizations - have a Bachelor's Degree as the highest level of education acquired. The full distribution of

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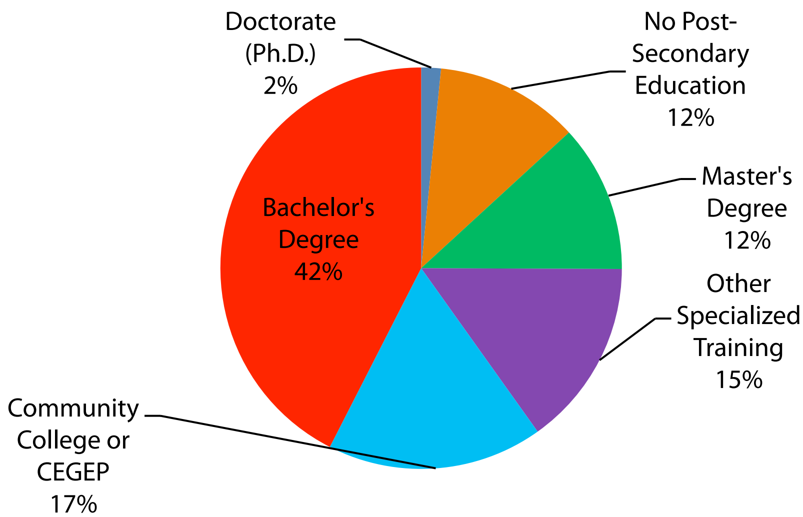
the level of education for cultural workers in Niagara is displayed in the figure below. This figure indicates that, on average, 73% of workers employed in the cultural workforce in Niagara have some form of post-secondary education (12%+2%+42%+17%). According to the Niagara Workforce Planning Board policy brief, only 19% of Niagara's workforce holds a 'university certificate, diploma, or degree'.[34] The provincial average for the same qualifications is 29%.[35] In light of these statistics, we can see that Niagara's cultural sector is a relatively highly educated workforce.

Figure 18: Average % of employees, by highest level of education attained



Source: Nordicity online data collection tool; mode n=49 n=50 n= 51

3.4 Profile of Independent Artists and/or Freelance Professionals

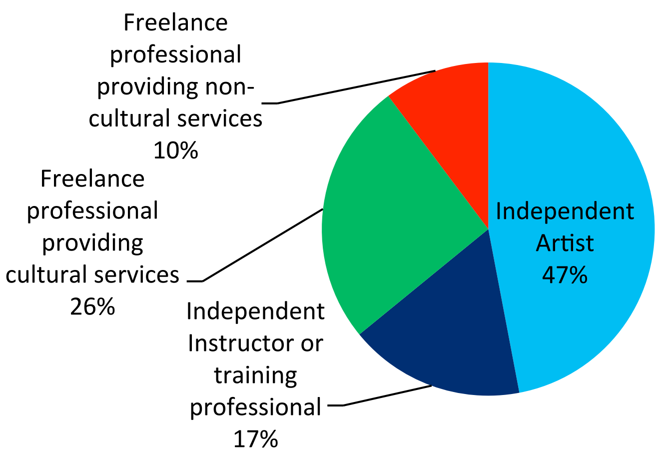
A total of 84 survey respondents indicated that they were freelance professionals or independent artists. Respondents indicated that the average number of years they had been working as an independent artist or freelance professional in the cultural sector in Niagara was just over 18 years. Again, this figure illustrates that the cultural sector in Niagara is quite mature and well established. This longevity may be both a strength and a weakness. On the one hand, it indicates that there is enough employment and opportunity in the region for

[34] Niagara Workforce Planning Board , Policy Brief #8 (prepared by en Scholtens and Doug Hagar) November 2010. Accessed April 12, 2013: http://www.brocku.ca/webfm_send/15381.
[35] Ibid.

independent artists and freelancers to maintain long sustainable careers in the region. On the other hand, it also indicates that there are fewer emerging professionals and artists establishing themselves in Niagara.

Freelance professionals in Niagara's cultural sector work in a number of different capacities. The figure below demonstrates the types of different freelance professionals based on whether they were providing cultural or non-cultural services, and on whether they self-categorized as an independent artist, independent instructor or other type of freelance professional. The majority of 'freelancer' respondents identified themselves as independent artists, which includes preforming artists, visual artists, musicians and others.

Figure 19: Freelancer type: Categories



Source: Nordicity online data collection tool; n=117
*Note that some respondents identified themselves as operating in more than one category.

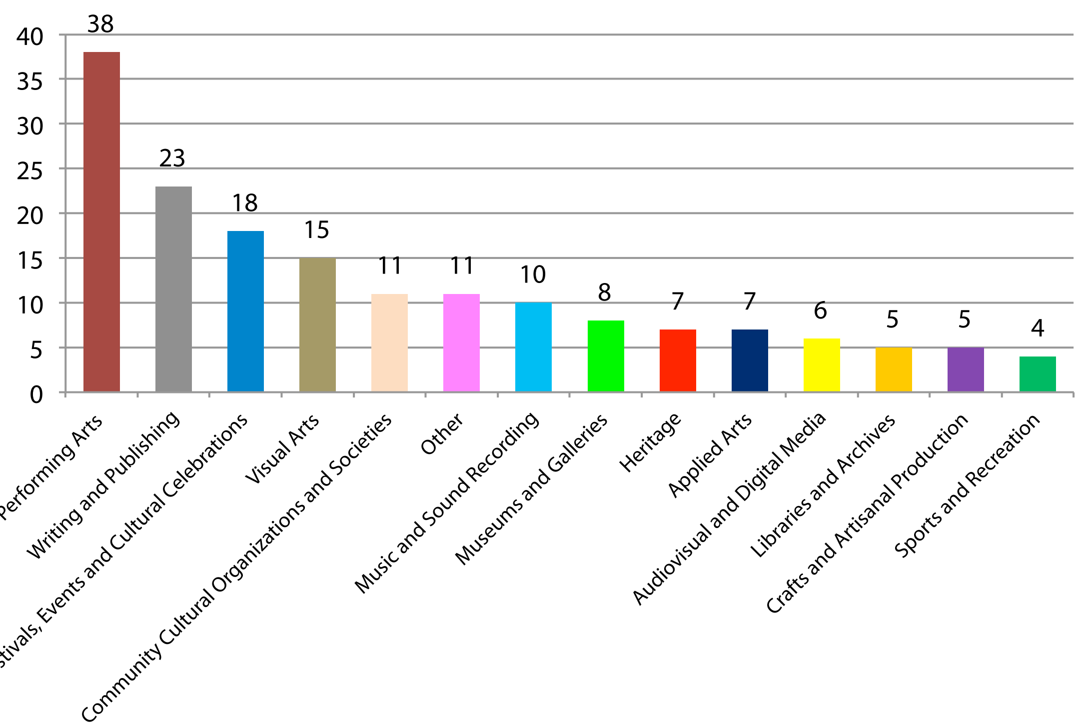
Freelancers reported that, on average, they worked on just over 106 cultural engagements in 2011(n=33). This fairly high number of engagements indicates that freelancers in Niagara are busy and very active.[36] It may also indicate that there is a high reliance in the sector on freelance labour which can be used on an 'as-needed' basis. By relying more heavily on freelance labour, cultural organizations and businesses can manage their costs within limited budgets by avoiding high overhead costs related to supporting wages for a larger core staff. While respondents were not asked to specify what types of engagements were included in this number, it may include anything from a contribution to a periodical

[36] In this context a cultural engagement means a contract or project for which a freelance professional was hired to complete by a cultural organization or business.

publication (i.e. newspaper or magazine), freelance production work for a performing arts production, or freelance work on a museum exhibition or program development. The average number of engagements reported by freelancers that indicated that they work as an independent instructor or training professional was just over 41 in 2011 (n=10).

Freelancers were also asked to identify the cultural segments where they are most active. Due to the nature of freelance work in the cultural sector, respondents were able to select several different cultural segments that apply to them. Overall, there was a higher frequency of freelancers and independent professionals who indicated they were active in the 'Live Performing Arts' and 'writing and publishing' segments'. The figure below illustrates which segments of the cultural sector are the most active for freelance and independent professionals.

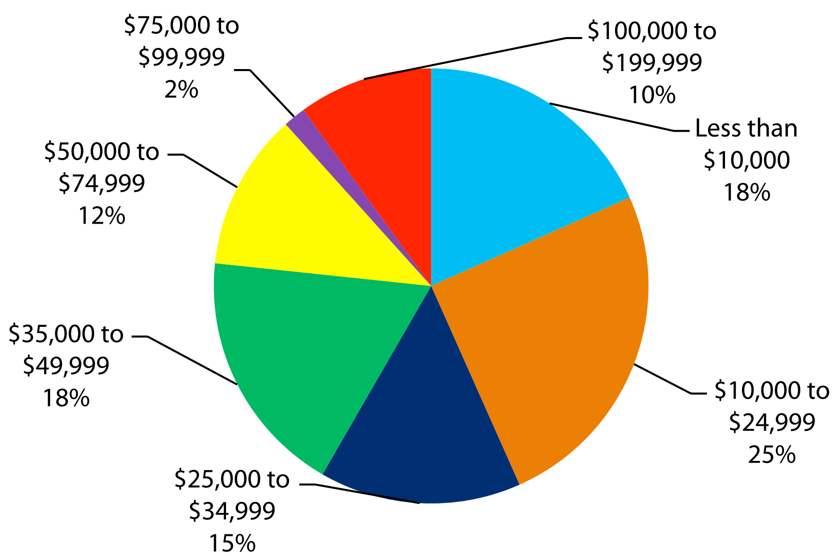
Figure 20: Freelancer type: Cultural Segments (number of engagements)



Source: Nordicity online data collection tool; n=219

Freelancers and independent artists were also asked to report on their total income from 2011 – including any income from their work as a freelancer or artist and any other source of income (e.g., additional employment). In total, about 58% of respondents reported they earned $35,000 or less. Statistics Canada data for Ontario in 2011 broke down average weekly earnings by industry. For the 'Arts, entertainment and recreation' industry, the average weekly earnings is $532.85.[37] As a yearly income, this adjusts to about $27,700.[38] For 'Information and cultural industries', average weekly earnings are $1,134.03– that is approximately $58,970 annually.[39] The freelancers in the survey earn modestly more than their 'Arts, entertainment and recreation' compatriots but 60% less than those in the 'Information and cultural industries'. Freelancer and independent artists in Niagara's cultural sector, on the whole, are earning less than in every other industry except for the 'Arts, entertainment and recreation' and the 'Accommodation and food service' industries.[40]

Figure 21: Freelancer Reported Income



Source: Nordicity online data collection tool; n=60

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[37] Statistics Canada. (2013). "Earnings, average weekly, by industry, monthly (Ontario)". Accessed April 9, 2013 from: http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/labor93g-eng.htm

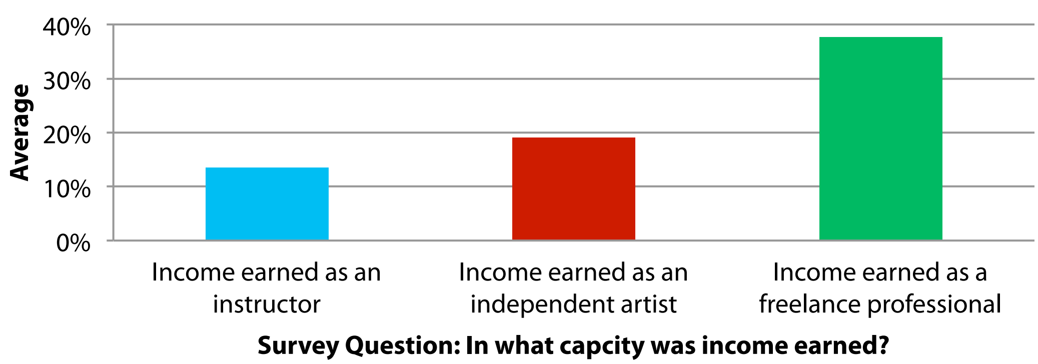
[38] Ibid.

[39] Ibid.

[40] Listed by Statistics Canada in the CANSIM table 281-0028.

Respondents were also asked to report the percentage of their total income in 2011 that came from work in the cultural sector as a freelance professional and/or independent artist. The average percentage of total income attributed to work as a freelancer was almost 35%, indicating that freelancers and independent artists heavily subsidize their work with additional sources of income like additional employment. This means that the earnings of a freelancer or independent artist in Niagara are not enough to live on for the average citizen of Niagara. This is a weakness inherent in the cultural sector since the nature of the cultural sector is an 'ebb and flow' of interest in cultural goods and services and not always a steady stream of income. Ten respondents indicated that they did not earn any income from their work as an independent artist, freelance professional or independent instructor in the cultural sector in 2011. The figure below illustrates the average percentage of income earned by freelancers for their work as a freelance professional, independent artist and/or independent instructor in 2011. [41]

Figure 22: Average of Total Income Earned as a Freelancer in the cultural sector



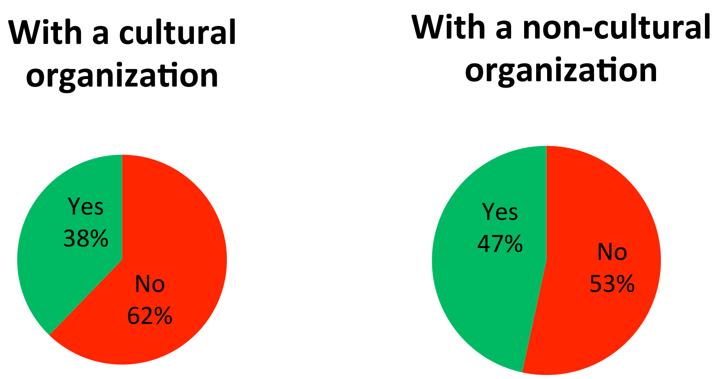
Source: Nordicity online data collection tool; income earned as an instructor n=55, income earned as an independent artist n=54, income earned as a freelance professional n=55

As seen above in Figure 22, many freelancers and independent artists in Niagara have to supplement their income with other part-time, full-time, seasonal or contract employment; either with a cultural organization or with a non-cultural organization, potentially with both (see Figure 23 below). Indeed, 38% of respondents indicated that they were employed by a

[41] Please note that some respondents may have reported income from more than one of these activities as they may have worked as an independent artist, freelance professional and independent instructor or any combination thereof during FYE 2011.

cultural organization and 47% indicated that they were employed by a non-cultural organization.[42]

Figure 23: Freelancers Maintaining other Employment

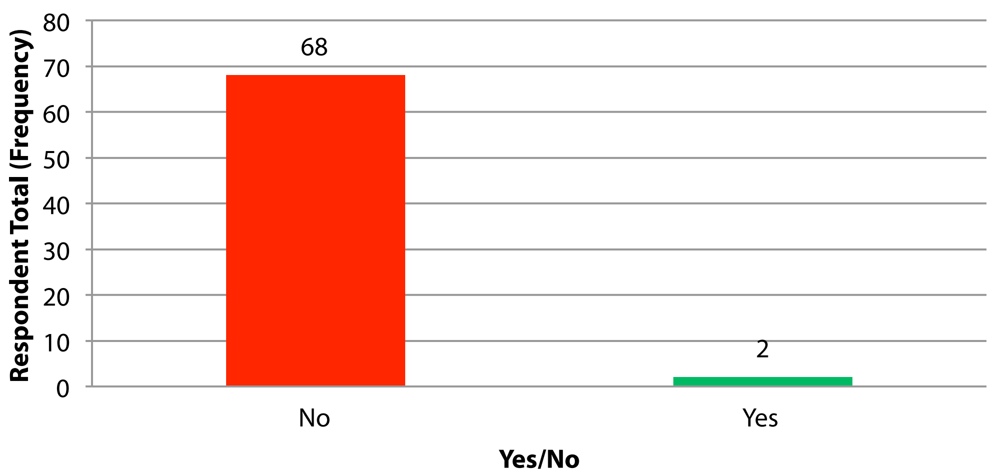


Source: Nordicity online data collection tool; with a cultural organization n=90, with a non-cultural organization n=88

Very few independent or freelance cultural workers access public funding to support their cultural profession. As Figure 24 shows, only two respondents indicated that they received government assistance in their capacity as a freelance or independent artist. Given the importance of public funding to the cultural sector and for individual workers, this should be studied further.

[42] Please note that because of the way the questions were designed these figures cannot be viewed as additive. Some respondents may have responded "yes" or "no" to both questions or may have answered "yes" to one question but "no" to the other. As such, it is not possible to deduce the total percentage of respondents who did or did not seek employment beyond their freelance work.

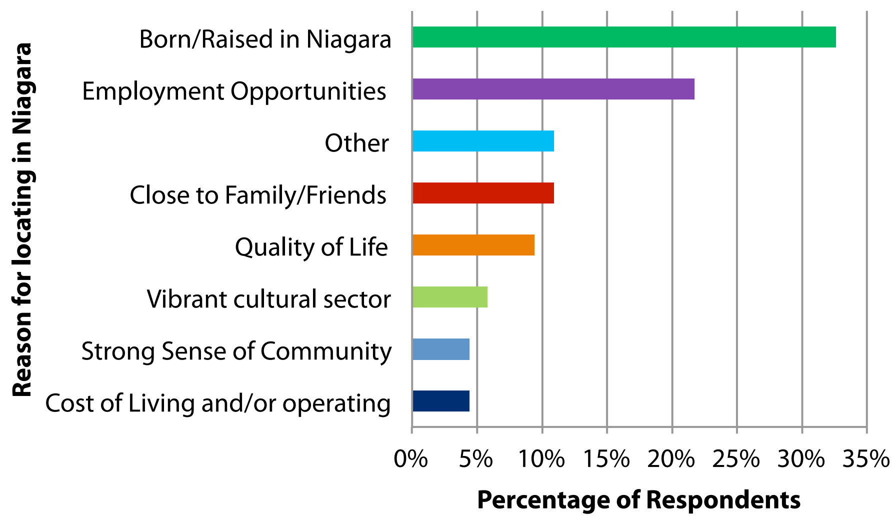
Figure 24: Respondents that Received Government Assistance as a Freelancer



Source: Nordicity online data collection tool; n=70

Most freelancers indicated that their reason for being in Niagara was that they were born and/or raised in Niagara. However, 'employment opportunities' was also frequently selected as a reason for being located in Niagara, which likely indicates that there are a number of freelancer opportunities in the region and surrounding areas. It could also indicate that these individuals found another source of employment in Niagara that allows them to supplement their freelance income. Also, very few respondents answered that their primary reason for being located in Niagara was the vibrant cultural sector or the sense of community. These results highlight a key opportunity for the Niagara Region and its partners to improve the visibility of Niagara as a place to locate due to its rich offerings of cultural experiences and vibrancy. Figure 25 illustrates the full breakdown of reasons why freelancer respondents indicated they are located in Niagara.

Figure 25: What brought the Freelancer Respondent to Niagara



Source: Nordicity online data collection tool; n=138

3.5 Perspectives on the Cultural Sector in Niagara: Qualitative Survey Questions

The survey asked respondents to offer their thoughts and insights on the vitality of the cultural sector in Niagara. The results of these questions are presented below.

Live Performing Arts and Sports and Recreation are deemed 'Extremely Active' in Niagara

Most survey respondents indicated that the 'Live Performing Arts' and 'Sports and Recreation' segments of the cultural sector are 'Extremely Active' in Niagara (61 respondents and 68 respondents, respectively). In addition, 'Festivals, Events and Cultural Celebrations' were identified as 'Very Active' by 71 respondents. On the other hand, respondents indicated that 'Writing and Publishing' and 'Music and Sound Recording' are segments that are 'Not at all Active' in Niagara (39 and 28 respondents selected 'Not at all Active' for these segments respectively). This perception is likely a reflection that the performing arts and sports and recreation segments have the most media coverage of all sub-sectors as well as the fact that the survey occurred during the peak of performing arts and sports season. This relatively intense media coverage for live performing arts and sports at the community level (and the GTA for performing arts) could be expanded to the Niagara regional level to build regional audiences.

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Table 3: Active or Not: Segments of Cultural Sector

	Respondent Total (Frequency)
Live Performing Arts: Extremely Active	61
Sports and Recreation': Extremely Active	68
Festivals, Events and Cultural Celebrations: Very Active	71
Writing and Publishing: Not at all Active	39
Music and Sound Recording: Not at all Active	28

Source: Nordicity online data collection tool

Financial support is deemed an 'Extremely Limiting' factor for the success and development of the cultural sector in Niagara

Respondents were also asked to identify the most significant factors limiting the success and development of the cultural sector in Niagara. Of the 13 factors listed in the survey, most respondents agreed that 'level of financial support for the sector from the Regional government' (60 respondents selected this factor as extremely limiting) and 'level of financial support for the sector from the Federal government' (53 respondents) were both 'Extremely Limiting' factors.[43] On the other hand, the 'Value of the Canadian Dollar', 'Availability of skilled cultural professionals', and 'Level of tourism in your Municipality' were all identified as 'not at all limiting' by a large proportion of respondents (37, 22 and 27 respondents, respectively). These results indicate that there is a need for greater financial support from all levels of government among cultural organizations in Niagara.

[43] A question about levels of Municipal financial support was also asked, but did not have a significant response rate.

Table 4: Financial Support: Rating of Limitations

	Respondent Total (Frequency)
Level of financial support for the sector from the Regional government: Extremely Limiting	60
Level of financial support for the sector from the Federal government: Extremely Limiting	53
Value of the Canadian Dollar: Not at all limiting	37
Level of tourism in your Municipality: Not at all limiting	27
Availability of skilled cultural professionals: Not at all limiting	22

Source: Nordicity online data collection tool

Public participation in cultural products, services or activities has slightly increased over the last five years

Finally, respondents were asked to comment on their perception of public participation in cultural products, services or activities in Niagara over the last five years. The table below illustrates the distribution of responses for this question. There were 58 respondents who agreed that public participation has slightly increased over the last five years.

Table 5: Perception of public participation in cultural products, services or activities in Niagara over the last five years

	Respondent Total (Frequency)
Don't know	16
Greatly decreased	18
Slightly decreased	24
Slightly increased	58
Greatly increased	23
Stayed the same	21

Source: Nordicity online data collection tool