

EXECUTIVE SUMMARY
ECONOMIC AND TAX REVENUE IMPACT ASSESSMENT
WINNIPEG ARTS COUNCIL
AND
WINNIPEG ARTS AND CULTURE COMMUNITY

GEORGETOWN NEWBURY GROUP (GNG)
FOR PROBE RESEARCH

Right Answers

Knowledge

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Part 1: The Winnipeg Arts Council Community:

- Total Manitoba-based spending by artists and culture organizations supported by WAC, as well as patrons, was estimated at \$125.4 million for 2019. Nearly all of this direct spending occurred in the City of Winnipeg.
- Winnipeg businesses and other Manitoba businesses provided goods and services totaling an estimated \$99.7 million of related spending. The remaining \$25.7 million went to suppliers outside of Manitoba.
- The Winnipeg economy, measured by Gross Domestic Product at Market Prices (GDP), grew by \$105 million due to this WAC-supported spending. This translates to a net monetary economic impact of \$0.83 for every dollar spent.
- Spending contributed \$71 million to wages and salaries in the city. This represents \$0.56 per dollar of spending and a 71% share of the net Winnipeg monetary economic impact.
- Winnipeg employment is enhanced due to WAC-supported organizations, artists and patrons by an estimated 1,971 person-years of employment. For every \$1 million in WAC-related expenditures, 15.7 person-years are added to the employment rolls.
- Each person-year of employment grew the Winnipeg economy by \$53,100.
- Estimated WAC-related tax revenue generated within the boundaries of the City of Winnipeg was \$38.6 million.
- The City of Winnipeg's estimated revenue inflow of \$4.7 million represents 12% of the total tax revenue generated within Winnipeg by WAC-supported artists, organizations and patrons.
- The estimated composition of the City of Winnipeg's \$4.7 million revenue inflow was:
 - Property taxes: \$2.54 million;
 - Business taxes: \$0.24 million;
 - Other revenue sources: \$1.92 million.

Part 2: The Broader Winnipeg Arts and Creative Industries as a Whole:

- The direct 2018 net value-added economic activity, measured by Real GDP, stood at \$1.6 billion. Over the previous ten years, the arts and creative industries in Winnipeg, as defined by Statistics Canada, increased their direct economic contribution by nearly \$300 million, a 22.2% increase.
- The arts and creative industries generated 37.6 million hours of work in Winnipeg in 2018. Over the previous decade, the total hours rose by more than 1.3 million, an increase of 3.7%.
- There were an estimated 23,900 jobs in the sector in 2018. Ten-year growth in jobs was nearly 1,900, representing an increase of 8.5%.
- In 2018, the average hours worked per job was 1,570. On a weekly basis, this translates to 30.2 hours per week. Based on a 40-hour work week, it is 76% of full-time equivalent work year.
- The 2018 estimate of 23,900 jobs converts to 18,100 full-time equivalent jobs, based on a standard 40-hour work week. The ten-year growth rate of full-time equivalent jobs in the sector was 3.7%.
- Labour productivity per hour worked was \$42.60. So, for every hour worked in the arts and creative industries, economic activity in the City of Winnipeg increased by close to \$43. Hour productivity increased by \$6.50 in the last ten years, a 17.9% increase.
- Labour productivity per job turns out to be \$67,000. Hence, for every job in the arts and creative industries, economic activity in the City of Winnipeg increased by \$67,000. Job productivity increased by \$7,500 in the last ten years, a 12.6% growth rate.
- Labour productivity per full-time equivalent job was \$88,600. Therefore, for every full-time equivalent job in the arts and creative industries, economic activity in the City of Winnipeg increased by \$88,600. Full-time equivalent job productivity increased by \$13,500 in the last ten years, a 17.9% increase.

INTRODUCTION:

The Georgetown Newbury Group (GNG) worked with Probe Research Inc. to develop economic and tax revenue impacts for expenditures related to the annual operational activities of Winnipeg artists and arts organizations associated with or supported by the Winnipeg Arts Council (WAC).

The overall impact assessment consists of three components:

- i) Winnipeg-based arts and culture organizations;
- ii) Winnipeg-based individual artists;
- iii) Non-ticket expenditures of attendees participating in arts and culture events (e.g. visits to museums, art galleries, cultural festivals, etc.).

The primary data for the WAC-supported community impact assessment were derived from four Probe Research surveys. They were:

1. A September 2019 Probe Research Omnibus survey of 1,000 Manitobans, with 600 respondents in Winnipeg and 400 from the remainder of the province;
2. A September 2019 Probe Research panel survey of 1,039 respondents (Winnipeg 829; Outside Winnipeg 210);
3. 40 arts and culture organizations located in Winnipeg (who are supported or funded by WAC);
4. 212 individual artists performing their craft in Winnipeg (who are supported or funded by WAC).

GNG engaged the Manitoba Bureau of Statistics (MBS), the central statistical agency for the Province of Manitoba, to develop the estimated total economic/tax revenue impacts to the Province of Manitoba. GNG provided MBS with the required expenditure information for its impact analysis and undertook the subsequent analytics and interpretation of the results.

The MBS analyses were produced using the MBS Economic Impact Assessment Model and the MBS Tax Revenue Impact Assessment Model. These models are the most comprehensive available and utilized economic information that is only available to MBS. These results cannot provide a complete or absolute measure of the impact of economic change. **Therefore, the economic impacts should be treated as general estimates only and never as absolutes.**

From MBS's Manitoba-level information, GNG estimated the economic and tax revenue contribution of the City of Winnipeg, for each of the three components:

- i) Winnipeg-based arts and culture organizations;
- ii) Winnipeg-based individual artists;
- iii) Non-ticket expenditures of attendees participating in arts and culture events (e.g. visits to museums, art galleries, cultural festivals, etc.).

In addition to the survey-based analysis of WAC-supported arts and culture spending, GNG produced an updated economic profile of the more broadly defined Winnipeg arts and creative industries sector as a whole. This allowed us to update data contained in the 2009 Prairie Research Associates (PRA) Inc. report, *Ticket to the Future Phase I: The Economic Impact of the Arts and Creative Industries in Winnipeg*. GNG utilized PRA's definition of the sector, consisting of thirteen individual NAICS components including the publishing, architectural and advertising industries as well as more traditional artistic sub-sectors. (The sector's description was provided in Appendix B of the PRA report.)

The updated arts and creative industries economic profile drew upon Statistics Canada's detailed Productivity Industry Database, located on its website (cf. Access our data; Economic Accounts;

Productivity Accounts). The latest data update of May 22, 2019 contains 2018 annual industry estimates and revised previous years data for variables such as Real Gross Domestic Product, hours worked and the number of jobs.

Unlike the study of WAC-supported arts spending, the arts and creative industries profile provides only the direct economic contribution of the sector. Not included are its “multiplier effects” that result from the purchase of goods and services from suppliers as well as consumer spending from generated wages and salaries.

“RANGE” ECONOMIC AND TAX REVENUE IMPACT ESTIMATES: LOW-MEDIUM-HIGH

The standard practice in economic impact assessments is to present them in the form of “point estimates”. That is a single estimate for particular economic or tax revenue variables. In the WAC study, GNG deemed this practice inappropriate for two reasons:

1. Non-ticket spending estimates (e.g. meals and beverages) by persons attending arts and culture events can be quite variable. This spending does fluctuate based on the type of event attended and the range of casual to formal dining. Therefore, the average and total spending estimates are influenced by the larger spenders.
2. The focus is on City of Winnipeg economic and tax revenue estimates. As a result, estimates have to be made on what percentage of the Manitoba-level estimates are applicable to the City of Winnipeg. Providing a range to the City of Winnipeg estimates is more informative to the reader than a simple number.

Three impact estimates - labeled low, medium and high - were developed, providing a likely range of the economic and tax revenue estimates attributable to the City of Winnipeg. Therefore, there were four range estimates developed (e.g. organizations, artists, patrons, total). The medium-level estimate, generally the centre of the range, was the most likely impact.

Based on the above, range estimates for the arts and creative industries profile also present low-medium-high estimates.

PART I: WAC’S ARTS AND CULTURE COMMUNITY

The total Winnipeg impact estimates combine the patron spending of Winnipeggers and those residing in other Manitoba locations with the spending of the 40 surveyed organizations and the 212 artists.

The range estimates for total Winnipeg impacts are:

- Direct spending in Manitoba: \$115.7 million to \$135.8 million
- Direct Manitoba business supply: \$92.9 million to \$107.0 million
- Winnipeg Gross Domestic Product at market prices: \$82.7 million to \$113.1 million
- Winnipeg labour income: \$56.1 million to \$75.4 million
- Total Winnipeg employment: 1,561 to 2,121 person-years
- Total tax collected in Winnipeg to all levels of government: \$31.6 million to \$41.6 million
- City of Winnipeg tax revenue: \$3.8 million to \$5.0 million

Appendix 1 provides the detailed Winnipeg range impact estimates for the components of organizations, artists, patrons and total.

Unfortunately, the range of economic and tax revenue impacts underestimates the total impact of Winnipeg's WAC-supported arts and culture spending. The reason for this is that not all organizations and artists associated with WAC responded to the two Probe Research surveys. The inclusion of the spending by these organizations and artists would more fully represent the community's contribution to Winnipeg's economy.

It was not statistically practical to develop "rough estimates" for the spending and employment of these non-responding organizations and artists. **Instead, the high estimates for spending by organizations and artists were employed to be a partial representation of the impact of the not-represented organizations and artists. For patron's spending impacts, the medium estimates were used.**

Report Table 1 provides the estimated Total Winnipeg Impacts, aggregating the three components' contributions to the City of Winnipeg's economy. Report Table 2 illustrates the role each of the components (organizations, artists, patrons) plays in the total.

REPORT TABLE 1: TOTAL WINNIPEG IMPACTS

TOTAL WINNIPEG ECONOMIC IMPACT ESTIMATES

	IMPACTS (\$000'S)
Total Expenditure	125,444
Direct Expenditure in Manitoba	125,444
Direct Manitoba Supply	99,720
Gross Manitoba Expenditure	147,427
Winnipeg GDP at Market Price	104,594
Winnipeg GDP at Basic Prices	97,977
Winnipeg Labour Income	70,579
Employment (Person-Years)	1,971

- Notes:
- (1) GDP at Market Prices is the total value of goods and services produced in the Manitoba economy.
 - (2) GDP at Basic Prices is the total value of goods and services produced by Manitoba industries. (i.e., GDP at Market Prices excluding taxes and subsidies on products)
 - (3) All economic impact estimates presented are in current dollars.
 - (4) Employment impacts are presented in terms of "person-years". A person-year is defined as one person being fully employed for a period of one year.
 - (5) Figures may not add to total due to rounding.

WINNIPEG GENERATED TAX REVENUE IMPACT ESTIMATES

	IMPACTS (\$000'S)
Income Taxes	
Individuals	3,091
Corporations	762
Other Direct Taxes	10,921
Indirect Taxes	1,929
Total Provincial Taxes	16,703
Winnipeg Local Taxes	4,700
Federal Taxes	17,205
Total Collected in Winnipeg	38,608

- Notes:
- (1) Other direct taxes includes Retail Sales Tax, Fuel Tax, Tobacco Tax, Liquor and Lotteries Corporation revenues, and other taxes.
 - (2) Indirect taxes include corporation taxes, Land Transfer Tax, and the Health and Education Levy.
 - (3) Tax revenue impacts are based on 2018/19 Manitoba budget estimates and 2016 income tax data.
 - (4) Figures may not add to total due to rounding.

Data Source: Georgetown Newbury Group: Manitoba Bureau of Statistics Economic Impact Assessment Model and Tax Revenue Impact Assessment Model

REPORT TABLE 2: WINNIPEG COMPONENTS IMPACTS

TOTAL WINNIPEG ECONOMIC IMPACT ESTIMATES (\$000'S)

	Organizations Impact	Artists Impact	Patrons Impact
Total Expenditure	62,777	6,624	56,043
Direct Expenditure in Manitoba	62,777	6,624	56,043
Direct Manitoba Supply	54,814	5,797	39,110
Gross Manitoba Expenditure	85,424	8,802	53,201
Winnipeg GDP at Market Price	65,206	6,967	32,421
Winnipeg GDP at Basic Prices	63,807	6,750	27,420
Winnipeg Labour Income	47,149	5,054	18,375
Employment (Person-Years)	1,114	280	577

- Notes:
- (1) GDP at Market Prices is the total value of goods and services produced in the Manitoba economy.
 - (2) GDP at Basic Prices is the total value of goods and services produced by Manitoba industries. (i.e., GDP at Market Prices excluding taxes and subsidies on products).
 - (3) All economic impact estimates presented are in current dollars.
 - (4) Employment impacts are presented in terms of "person-years". A person-year is defined as one person being fully employed for a period of one year.
 - (5) Figures may not add to total due to rounding.

WINNIPEG GENERATED TAX REVENUE IMPACT ESTIMATES (\$000'S)

	Organizations Impact	Artists Impact	Patrons Impact
Income Taxes			
Individuals	2,291	86	714
Corporations	454	49	259
Other Direct Taxes	4,432	863	5,626
Indirect Taxes	1,246	139	544
Total Provincial Taxes	8,424	1,136	7,143
Winnipeg Local Taxes	2,781	474	1,446
Federal Taxes	9,272	1,303	6,630
Total Collected in Winnipeg	20,476	2,913	15,219

- Notes:
- (1) Other direct taxes includes Retail Sales Tax, Fuel Tax, Tobacco Tax, Liquor and Lotteries Corporation revenues, and other taxes.
 - (2) Indirect taxes includes corporations taxes, Land Transfer Tax, and the Health and Education Levy.
 - (3) Tax revenue impacts are based on 2018/19 Manitoba budget estimates and 2016 income tax data.
 - (4) Figures may not add to total due to rounding.

Data Source: Georgetown Newbury Group: Manitoba Bureau of Statistics.
Economic Impact Assessment Model
Tax Revenue Impact Assessment Model

IMPACT HIGHLIGHTS:

Total Manitoba-based spending by WAC-supported arts and culture organizations, artists and patrons was estimated at \$125.4 million. Nearly all of this direct spending occurred in the City of Winnipeg. Winnipeg businesses and other Manitoba businesses provided goods and services totaling an estimated \$99.7 million of the arts and culture-related spending. The remaining \$25.7 million went to suppliers outside of Manitoba.

Based on this level of spending, the following are the economic and tax revenue impact estimates for the City of Winnipeg:

- The Winnipeg economy, as measured by Gross Domestic Product at Market Prices (GDP), grew by \$105 million. This translates to a net monetary impact to the economy of \$0.83, for every dollar spent.
- Arts and culture spending contributed \$71 million to the total wages and salaries in the city. This represents \$0.56 per dollar of spending and 71% of the net Winnipeg monetary economic impact.
- Total employment in Manitoba is enhanced due to the arts and culture community by an estimated 1,971 person-years of employment. For every \$1 million in arts and culture expenditures by artists, organizations and patrons, 15.7 person-years are added to the employment rolls.
- Each person-year of employment grew the Winnipeg economy by \$53,100.
- The estimated total tax revenue generated within the boundaries of the City of Winnipeg was \$38.6 million. The distribution among the three levels of government was:
 - Provincial government: \$16.7 million, driven by \$10.9 million in non-income taxes such as retail sale taxes;
 - Federal Government: \$17.2 million;
 - City of Winnipeg: \$4.7 million.
- The City of Winnipeg's estimated revenue inflow of \$4.7 million represents 12.0% of the total tax revenue generated within Winnipeg from WAC-supported arts and cultural endeavours.
- The 2019 City of Winnipeg budget documents state that 54% of the city's revenue comes from property taxes, 5.1% from business taxes and 40.9% from other sources. This implies, on average, the WAC-supported arts and culture community provides property taxes of \$2.54 million, business taxes of \$0.24 million, and \$1.92 million in other revenue sources.

The expenditures by arts organizations have the largest influence on the Winnipeg overall impact. Patron spending has the second largest contribution. Artists' contribution lags far behind in third place. The following are the component percent shares for the main economic and tax revenue variables:

	Organizations	Patrons	Artists
Direct expenditure in Manitoba	50%	45%	5%
Winnipeg Gross Domestic Product at Market Prices	62%	31%	7%
Winnipeg Labour Income	67%	26%	7%
Total Winnipeg Employment	57%	29%	14%
Provincial Tax Revenue	50%	43%	7%
Federal Tax Revenue	54%	39%	8%
Winnipeg Tax Revenue	59%	31%	10%
Total Tax Collected in Winnipeg	53%	39%	8%

PART II: WINNIPEG’S ARTS AND CREATIVE INDUSTRIES

The economic profile of the broader arts and creative industries as a whole reflects the most recent Statistics Canada information. As noted earlier, the industries included in the arts and creative industries sector mirror those of the Prairie Research Associates (PRA) Inc. report *Ticket to the Future Phase 1: The Economic Impact of the Arts and Creative Industries in Winnipeg*.

There are thirteen individual industrial components that constitute the arts and creative industries. The individual sub-components information can be viewed in Appendix II.

Three key economic indicators highlighting the direct contribution of the arts and creative industries are:

1. Real Gross Domestic Product, measured in 2012 chained dollars
2. Total number of hours worked
3. Number of jobs

It should be noted that the presented impacts of Winnipeg’s arts and creative industries refers only to their direct economic contribution. Not included are their “Multiplier Effects”. These additional economic benefits accrue from purchases of goods and services from their suppliers, as well as the consumer spending of the wages and salaries generated by the sector.

The City of Winnipeg estimates for the above three economic indicators were derived from Statistics Canada’s estimates at the Manitoba level for each of the thirteen sub-sectors, as defined in the PRA report. For each sub-sector (e.g. performing arts, spectator sports & related services, heritage institutions, architectural services, etc.), low-medium-high percent shares for the economic concentration within the boundaries of the City of Winnipeg were determined. The median estimates are the midpoint between the low and high impact estimates.

These low-medium-high percentages were individually applied to the Manitoba-level individual sub-sectors to produce the City of Winnipeg arts and creative industries estimates. Aggregating produced the City of Winnipeg total for each type of information variable.

The City of Winnipeg’s medium estimate for 2018 Real GDP for the arts and creative industries was \$1.6 billion (low \$1.49 billion, high \$1.71 billion). This represented 72% of the Manitoba Real GDP estimate of \$2.21 billion. In terms of the number of jobs, the Winnipeg estimate was 23,900 (low 22,200 jobs, high 25,500 jobs).

Using the medium estimate of direct hours worked of 37.6 million and assuming 2,080 hours is a full-time equivalent job (e.g. 40 hours per week for 52 weeks), there are 18,100 person-years of employment.

Winnipeg’s arts and creative industries have achieved considerable economic growth over the ten years period, 2008 to 2018. Appendix II also presents a summary of the Winnipeg-level estimates for 2008 and 2018.

ECONOMIC PROFILE HIGHLIGHTS:

Report Table 3 presents the medium level estimates for three key economic indicators. Also presented are 2018 estimates for full-time equivalent jobs and three measures of labour productivity.

Labour productivity is defined as the dollar value of economic output per unit of labour input. Economic output is measured by Real Gross Domestic Product. For labour input, there are three choices. In order of importance, they are hours worked, jobs and full-time equivalent jobs.

Report Table 3

Winnipeg Arts and Creative Industries Key Economic Indicators	2018 Level Medium Estimate	2008 to 2018 Growth Rate (%) Medium Estimate
Real GPD (millions of 2012 chained \$)	\$1.6 billion	22.2
Total Hours Worked	37.6 million	3.7
Number of Jobs	23,900	8.5
Full-Time Equivalent Jobs	18,100	3.7
Real GPD per Job	\$67,000	12.6
Real GDP per Full-time Equivalent Job	\$88,600	17.9
Real GDP per Hour Worked	\$42.60	17.9

- The direct net value-added economic activity, measured by Winnipeg Real GDP, stood at \$1.6 billion for 2018. Over the ten-year period, the arts and creative industries increased their direct economic contribution by nearly \$300 million. Total growth rate was 22.2% or an annual compound increase of 2.0%.
- The arts and creative industries generated 37.6 million hours of work. Over the ten-year period, the Winnipeg arts and creative industries hours worked rose by more than 1.3 million, a 3.7% rise.
- There were an estimated 23,900 jobs in the sector in 2018. Ten-year growth in jobs was nearly 1,900. This represented an overall increase of 8.5%.
- The medium estimate of average hours worked per job in 2018 was 1,570. On a weekly basis, this activity level translates to 30.2 hours per week. Based on a 40-hour work week, it is 76% of full-time equivalent work year.
- The 2018 medium estimate of 23,900 jobs converts to 18,100 full-time equivalent jobs, based on a standard 40-hour work week. The low and high estimates of full-time equivalent jobs are 16,800 and 19,300 respectively. The ten-year growth rate in full-time equivalent jobs was 3.7%.
- With 2018 Real GDP at \$1.6 billion and hours worked at 37,600 million, labour productivity per hour worked is \$42.60. So, for every hour worked in the arts and creative industries sector, economic activity in the City of Winnipeg increased by close to \$43. Labour hourly productivity increased by \$6.50 in the last ten years, a 17.9% increase.

- With 2018 Real GDP at \$1.6 billion and number of jobs at 23,900, labour productivity per job turns out to be \$67,000. Hence, for every job in the arts and creative industries sector, economic activity in the City of Winnipeg increased by \$67,000. Job productivity increased by \$7,500 in the last ten years, a 12.6% growth rate.
- With 2018 Real GDP at \$1.6 billion and number of full-time equivalent jobs estimated at 18,100, labour productivity per full-time equivalent job is \$88,600. Therefore, for every full-time equivalent job in the arts and creative industries sector, the economic activity in the City of Winnipeg increased by \$88,600. Full-time equivalent job productivity increased by \$13,500 in the last ten years, a 17.9% increase.

APPENDIX 1

**WAC-SUPPORTED ECONOMIC AND TAX REVENUE
IMPACT ASSESSMENT**

DETAILED TABLES

WINNIPEG IMPACTS FROM ARTS & CULTURE ORGANIZATIONS

TOTAL WINNIPEG ECONOMIC IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Total Expenditure	62,777	62,777	62,777
Direct Expenditure in Manitoba	62,777	62,777	62,777
Direct Manitoba Supply	54,814	54,814	54,814
Gross Manitoba Expenditure	85,424	85,424	85,424
Winnipeg GDP at Market Price	59,218	53,229	65,206
Winnipeg GDP at Basic Prices	57,947	52,087	63,807
Winnipeg Labour Income	42,819	38,489	47,149
Employment (Person-Years)			
Project Direct	715	643	787
Direct Suppliers	99	89	109
Indirect & Induced	197	177	217
Total Employment	1,011	909	1,114

- Notes:
- (1) GDP at Market Prices is the total value of goods and services produced in the Manitoba economy.
 - (2) GDP at Basic Prices is the total value of goods and services produced by Manitoba industries. (i.e., GDP at Market Prices excluding taxes and subsidies on products)
 - (3) All Economic impact estimates presented are in current dollars.
 - (4) Employment impacts are presented in terms of "Persons-Years". A Person-Year is defined as one person being fully employed for a period of one year.
 - (5) Figures may not add to total due to rounding.

WINNIPEG GENERATED TAX REVENUE IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Income Taxes			
Individuals	2,081	1,870	2,291
Corporations	413	371	454
Other Direct Taxes	4,025	3,618	4,432
Indirect Taxes	1,132	1,017	1,246
Total Provincial Taxes	7,650	6,876	8,424
Winnipeg Local Taxes	2,525	2,270	2,781
Federal Taxes	8,420	7,569	9,272
Total Collected in Winnipeg	18,596	16,715	20,476

- Notes:
- (1) Other Direct Taxes includes Retail Sales Tax, Fuel Tax, Tobacco Tax, Liquor and Lotteries Corporation Revenues, and Other Taxes.
 - (2) Indirect Taxes includes Corporations, Taxes, Land Transfer Tax, and the Health and Education Levy.
 - (3) Tax revenue impacts are based on 2018/19 Manitoba budget estimates and 2016 income tax data.
 - (4) Figures may not add to total due to rounding.

Data Source: Georgetown Newbury Group: Manitoba Bureau of Statistics.
 Economic Impact Assessment Model
 Tax Revenue Impact Assessment Model

WINNIPEG IMPACTS FROM ARTIST ACTIVITIES

TOTAL WINNIPEG ECONOMIC IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Total Expenditure	6,624	6,624	6,624
Direct Expenditure in Manitoba	6,624	6,624	6,624
Direct Manitoba Supply	5,797	5,797	5,797
Gross Manitoba Expenditure	8,802	8,802	8,802
Winnipeg GDP at Market Price	6,327	5,687	6,967
Winnipeg GDP at Basic Prices	6,130	5,510	6,750
Winnipeg Labour Income	4,590	4,126	5,054
Employment (Person-Years)			
Project Direct	222	200	245
Direct Suppliers	12	11	13
Indirect & Induced	20	18	22
Total Employment	255	229	280

- Notes:
- (1) GDP at Market Prices is the total value of goods and services produced in the Manitoba economy.
 - (2) GDP at Basic Prices is the total value of goods and services produced by Manitoba industries. (i.e., GDP at Market Prices excluding taxes and subsidies on products)
 - (3) All Economic impact estimates presented are in current dollars.
 - (4) Employment impacts are presented in terms of "Persons-Years". A Person-Year is defined as one person being fully employed for a period of one year.
 - (5) Figures may not add to total due to rounding.

WINNIPEG GENERATED TAX REVENUE IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Income Taxes			
Individuals	76	70	86
Corporations	43	40	49
Other Direct Taxes	766	705	863
Indirect Taxes	123	113	139
Total Provincial Taxes	1,009	928	1,136
Winnipeg Local Taxes	421	387	474
Federal Taxes	1,157	1,064	1,303
Total Collected in Winnipeg	2,586	2,378	2,913

- Notes:
- (1) Other Direct Taxes includes Retail Sales Tax, Fuel Tax, Tobacco Tax, Liquor and Lotteries Corporation Revenues, and Other Taxes.
 - (2) Indirect Taxes includes Corporations, Taxes, Land Transfer Tax, and the Health and Education Levy.
 - (3) Tax revenue impacts are based on 2018/19 Manitoba budget estimates and 2016 income tax data.
 - (4) Figures may not add to total due to rounding.

Data Source: Georgetown Newbury Group: Manitoba Bureau of Statistics.
 Economic Impact Assessment Model
 Tax Revenue Impact Assessment Model

WINNIPEG IMPACTS FROM PATRON SPENDING

TOTAL WINNIPEG ECONOMIC IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Total Expenditure	56,043	46,295	66,383
Direct Expenditure in Manitoba	56,043	46,295	66,383
Direct Manitoba Supply	39,110	32,251	46,378
Gross Manitoba Expenditure	53,201	43,920	63,043
Winnipeg GDP at Market Price	32,421	23,732	40,935
Winnipeg GDP at Basic Prices	27,420	20,043	34,663
Winnipeg Labour Income	18,375	13,454	23,195
Employment (Person-Years)	577	423	727

- Notes:
- (1) GDP at Market Prices is the total value of goods and services produced in the Manitoba economy.
 - (2) GDP at Basic Prices is the total value of goods and services produced by Manitoba industries. (i.e., GDP at Market Prices excluding taxes and subsidies on products)
 - (3) All Economic impact estimates presented are in current dollars.
 - (4) Employment impacts are presented in terms of "Persons-Years". A Person-Year is defined as one person being fully employed for a period of one year.
 - (5) Figures may not add to total due to rounding.

WINNIPEG GENERATED TAX REVENUE IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Income Taxes			
Individuals	714	582	861
Corporations	259	209	315
Other Direct Taxes	5,626	4,624	6,733
Indirect Taxes	544	447	651
Total Provincial Taxes	7,143	5,862	8,559
Winnipeg Local Taxes	1,446	1,184	1,736
Federal Taxes	6,630	5,441	7,944
Total Collected in Winnipeg	15,219	12,487	18,239

- Notes:
- (1) Other Direct Taxes includes Retail Sales Tax, Fuel Tax, Tobacco Tax, Liquor and Lotteries Corporation Revenues, and Other Taxes.
 - (2) Indirect Taxes includes Corporations, Taxes, Land Transfer Tax, and the Health and Education Levy.
 - (3) Tax revenue impacts are based on 2018/19 Manitoba budget estimates and 2016 income tax data.
 - (4) Figures may not add to total due to rounding.

Data Source: Georgetown Newbury Group: Manitoba Bureau of Statistics.
Economic Impact Assessment Model
Tax Revenue Impact Assessment Model

TOTAL WINNIPEG IMPACTS

TOTAL WINNIPEG ECONOMIC IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Total Expenditure	125,444	115,696	135,784
Direct Expenditure in Manitoba	125,444	115,696	135,784
Direct Manitoba Supply	99,720	92,861	106,989
Gross Manitoba Expenditure	147,427	138,145	157,268
Winnipeg GDP at Market Price	97,966	82,648	113,107
Winnipeg GDP at Basic Prices	91,497	77,641	105,221
Winnipeg Labour Income	65,785	56,069	75,399
Employment (Person-Years)	1,843	1,561	2,121

- Notes:
- (1) GDP at Market Prices is the total value of goods and services produced in the Manitoba economy.
 - (2) GDP at Basic Prices is the total value of goods and services produced by Manitoba industries. (i.e., GDP at Market Prices excluding taxes and subsidies on products)
 - (3) All Economic impact estimates presented are in current dollars.
 - (4) Employment impacts are presented in terms of "Persons-Years". A Person-Year is defined as one person being fully employed for a period of one year.
 - (5) Figures may not add to total due to rounding.

WINNIPEG GENERATED TAX REVENUE IMPACT ESTIMATES

(\$000'S)

	Medium Impact	Low Impact	High Impact
Income Taxes			
Individuals	2,871	2,522	3,238
Corporations	715	620	817
Other Direct Taxes	10,417	8,947	12,028
Indirect Taxes	1,799	1,577	2,036
Total Provincial Taxes	15,802	13,666	18,119
Winnipeg Local Taxes	4,392	3,841	4,990
Federal Taxes	16,207	14,073	18,519
Total Collected in Winnipeg	36,401	31,580	41,629

- Notes:
- (1) Other Direct Taxes includes Retail Sales Tax, Fuel Tax, Tobacco Tax, Liquor and Lotteries Corporation Revenues, and Other Taxes.
 - (2) Indirect Taxes includes Corporations, Taxes, Land Transfer Tax, and the Health and Education Levy.
 - (3) Tax revenue impacts are based on 2018/19 Manitoba budget estimates and 2016 income tax data.
 - (4) Figures may not add to total due to rounding.

Data Source: Georgetown Newbury Group: Manitoba Bureau of Statistics -Economic Impact Assessment Model and Tax Revenue Impact Assessment Model

APPENDIX 2

**ECONOMIC PROFILE SUMMARY
ARTS AND CREATIVE INDUSTRIES**

WINNIPEG ARTS & CREATIVE INDUSTRIES 2008 AND 2018

ESTIMATED WINNIPEG'S ECONOMIC CONTRIBUTION

(\$000'S)

	Medium Impact	Low Impact	High Impact
Real Gross Domestic Product			
2018	1,600	1,489	1,710
2008	1,309	1,218	1,399
Percent Change 2008 to 2018	22.2%	22.2%	22.3%
2018 Percent Share of Manitoba Total	72.3%	67.3%	77.3%
Number of Hours Worked			
2018	37,561	34,974	40,149
2008	36,234	33,728	38,739
Percent Change 2008 to 2018	3.7%	3.7%	3.6%
2018 Percent Share of Manitoba Total	72.6%	67.6%	77.6%
Number of Jobs			
2018	23,886	22,243	25,530
2008	22,010	20,491	23,529
Percent Change 2008 to 2018	8.5%	8.6%	8.5%
2018 Percent Share of Manitoba Total	72.7%	67.6%	77.7%
Number of Full-time Equivalent Jobs			
2018	18,058	16,815	19,302
2008	17,420	16,215	18,625
Percent Change 2008 to 2018	3.7%	3.7%	3.6%
2018 Percent Share of Manitoba Total	72.6%	67.6%	77.6%

Data Source: Georgetown Newbury Group; Statistics Canada

Table 2:									
Manitoba Arts and Creative Industries: Direct Real 2008 GDP at Basic Prices									
2012 Chained Dollar Millions									
NAICS Codes	Description	Manitoba	Winnipeg share of GDP			Winnipeg GDP Estimates			
		2008 Real Direct GDP							
		2012 Chained \$ Millions							
			Low	Medium	High	Low	Medium	High	
323	Printing manufacturing	294.1	65.0%	70.0%	75.0%	191.2	205.9	220.6	
451	Sporting goods, hobby, book & music stores	83.0	70.0%	75.0%	80.0%	58.1	62.3	66.4	
511	Publishing industries	261.4	65.0%	70.0%	75.0%	169.9	183.0	196.1	
512	Motion Picture and video industries	41.5	75.0%	80.0%	85.0%	31.1	33.2	35.3	
515	Broadcasting except internet	133.1	75.0%	80.0%	85.0%	99.8	106.5	113.1	
516	Internet publishing and broadcasting								
519	Other information	23.6	65.0%	70.0%	75.0%	15.3	16.5	17.7	
5413	Architectural, engineering & related services	224.8	65.0%	70.0%	75.0%	146.1	157.4	168.6	
5414	Specialized design services	29.2	70.0%	75.0%	80.0%	20.4	21.9	23.4	
5415	Computer system design & related services	253.2	70.0%	75.0%	80.0%	177.2	189.9	202.6	
5418	Advertising & related services	61.7	65.0%	70.0%	75.0%	50.1	43.2	46.3	
71A	Performing arts, spectator sports & related services and heritage institutions	154.5	70.0%	75.0%	80.0%	108.2	115.9	123.6	
813A	Grant-making, civic, professional & similar organizations	247.3	65.0%	70.0%	75.0%	160.7	173.1	185.5	
Arts & Creative industries Real GDP total		1,807.4	Winnipeg Real GDP			1,218.3	1,308.6	1,399.0	
			Winnipeg's share			67.4%	72.4%	77.4%	
All-industries Real GDP Total		51,668.8							
Arts & Creative industries share of All-industries total		3.5%							

Data Source: Statistics Canada Table 36-10-0402-01

Table 3:								
Manitoba Arts and Creative Industries: 2018 Direct Hours Worked in thousands of hours								
NAICS Codes	Description	Manitoba 2018 Hours Worked (000's)	Winnipeg share of Hours Worked			Winnipeg Hours Worked (000's)		
			Low	Medium	High	Low	Medium	High
323	Printing manufacturing	5,946.0	65.0%	70.0%	75.0%	3,864.9	4,162.2	4,459.5
451	Sporting goods, hobby, book & music stores	3,278.0	70.0%	75.0%	80.0%	2,294.6	2,458.5	2,622.4
511	Publishing industries	2,871.0	65.0%	70.0%	75.0%	1,866.2	2,009.7	2,153.3
512	Motion Picture and video industries	1,971.0	75.0%	80.0%	85.0%	1,478.3	1,576.8	1,675.4
515	Broadcasting except internet	1,712.0	75.0%	80.0%	85.0%	1,284.0	1,369.6	1,455.2
516	Internet publishing and broadcasting							
519	Other information	872.0	65.0%	70.0%	75.0%	566.8	610.4	654.0
5413	Architectural, engineering & related services	7,163.0	65.0%	70.0%	75.0%	4,656.0	5,014.1	5,372.3
5414	Specialized design services	1,270.0	70.0%	75.0%	80.0%	889.0	952.5	1,016.0
5415	Computer system design & related services	7,177.0	70.0%	75.0%	80.0%	5,023.9	5,382.8	5,741.6
5418	Advertising & related services	1,838.0	65.0%	70.0%	75.0%	1,194.7	1,286.6	1,378.5
71A	Performing arts, spectator sports & related services and heritage institutions	7,748.0	70.0%	75.0%	80.0%	5,423.6	5,811.0	6,198.4
813A	Grant-making, civic, professional & similar organizations	9,896.0	65.0%	70.0%	75.0%	6,432.4	6,927.2	7,422.0
Arts & Creative industries Hours Worked Total		51,742.0	Winnipeg Hours Worked			34,974.3	37,561.4	40,148.5
			Winnipeg's share			67.6%	72.6%	77.6%
All-industries Hours Worked Total		1,152,630.0						
Arts & Creative industries share of all-industries total		4.5%						

Data Source: Statistics Canada Table 36-10-0489-02

Table 4:								
Manitoba Arts and Creative Industries: 2008 Direct Hours Worked in thousands of hours								
NAICS Codes	Description	Manitoba 2008 Hours Worked (000's)	Winnipeg share of Hours Worked			Winnipeg Hours Worked 2008 Hours Worked (000's)		
			Low	Medium	High	Low	Medium	High
323	Printing manufacturing	8,140	65.0%	70.0%	75.0%	5,291.0	5,698.0	6,105.0
451	Sporting goods, hobby, book & music stores	3,561	70.0%	75.0%	80.0%	2,492.7	2,670.8	2,848.8
511	Publishing industries	4,781	65.0%	70.0%	75.0%	3,107.7	3,346.7	3,585.8
512	Motion Picture and video industries	1,212	75.0%	80.0%	85.0%	909.0	969.6	1,030.2
515	Broadcasting except internet	2,097	75.0%	80.0%	85.0%	1,572.8	1,677.6	1,782.5
516	Internet publishing and broadcasting							
519	Other information	492	65.0%	70.0%	75.0%	319.8	344.4	369.0
5413	Architectural, engineering & related services	4,951	65.0%	70.0%	75.0%	3,218.2	3,465.7	3,713.3
5414	Specialized design services	1,207	70.0%	75.0%	80.0%	844.9	905.3	965.6
5415	Computer system design & related services	5,746	70.0%	75.0%	80.0%	4,022.2	4,309.5	4,596.8
5418	Advertising & related services	1,498	65.0%	70.0%	75.0%	973.7	1,048.6	1,123.5
71A	Performing arts, spectator sports & related services and heritage institutions	6,027	70.0%	75.0%	80.0%	4,218.9	4,502.3	4,821.6
813A	Grant-making, civic, professional & similar organizations	10,396	65.0%	70.0%	75.0%	6,757.4	7,277.2	7,797.0
Arts & Creative industries Hours Worked total		50,108	Winnipeg Hours Worked			33,728.2	36,233.6	38,739.0
			Winnipeg's share			67.3%	72.3%	77.3%
All-industries Hours Worked Total		1,094,192						
Arts & Creative industries share of All-industries total		4.6%						

Data Source: Statistics Canada Table 36-10-0489-02

Table 5:								
Manitoba Arts and Creative Industries: Direct Employment 2018 - Number of Jobs								
NAICS Codes	Description	Manitoba 2018 Jobs	Winnipeg share of Jobs			Winnipeg Job Estimates 2018 Jobs		
			Low	Medium	High	Low	Medium	High
323	Printing manufacturing	3,175	65.0%	70.0%	75.0%	2,063.8	2,222.5	2,381.3
451	Sporting goods, hobby, book & music stores	2,400	70.0%	75.0%	80.0%	1,680.0	1,800.0	1,920.0
511	Publishing industries	1,815	65.0%	70.0%	75.0%	1,179.8	1,270.5	1,361.3
512	Motion Picture and video industries	1,265	75.0%	80.0%	85.0%	948.8	1,012.0	1,075.3
515	Broadcasting except internet	1,080	75.0%	80.0%	85.0%	810.0	864.0	918.0
516	Internet publishing and broadcasting							
519	Other information	750	65.0%	70.0%	75.0%	487.5	525.0	562.5
5413	Architectural, engineering & related services	3,845	65.0%	70.0%	75.0%	2,499.3	2,691.5	2,883.8
5414	Specialized design services	890	70.0%	75.0%	80.0%	623.0	667.5	712.0
5415	Computer system design & related services	3,990	70.0%	75.0%	80.0%	2,793.0	2,992.5	3,192.0
5418	Advertising & related services	1,220	65.0%	70.0%	75.0%	793.0	854.0	915.0
71A	Performing arts, spectator sports & related services and heritage institutions	5,575	70.0%	75.0%	80.0%	3,902.5	4,181.3	4,460.0
813A	Grant-making, civic, professional & similar organizations	6,865	65.0%	70.0%	75.0%	4,462.3	4,805.5	5,148.8
Arts & Creative industries Jobs total		32,870.0	Winnipeg Hours Worked			22,242.8	23,886.3	25,529.8
			Winnipeg's share			67.7%	72.7%	77.7%
All-industries Jobs Total		683,395.0						
Arts & Creative industries share of All-industries total		4.8%						

Data Source: Statistics Canada Table 36-10-0402-01

Table 6:								
Manitoba Arts and Creative Industries: Direct Employment 2008 Number of Jobs								
NAICS Codes	Description	Manitoba 2008 Jobs	Winnipeg share of Jobs			Winnipeg Employment Estimates		
			Low	Medium	High	Low	Medium	High
323	Printing manufacturing	4,115	65.0%	70.0%	75.0%	2,674.8	2,880.5	3,086.3
451	Sporting goods, hobby, book & music stores	2,630	70.0%	75.0%	80.0%	1,841.0	1,972.5	2,104.0
511	Publishing industries	2,825	65.0%	70.0%	75.0%	1,836.3	1,977.5	2,118.8
512	Motion Picture and video industries	765	75.0%	80.0%	85.0%	573.8	612.0	650.3
515	Broadcasting except internet	1,230	75.0%	80.0%	85.0%	922.5	984.0	1,045.5
516	Internet publishing and broadcasting							
519	Other information	415	65.0%	70.0%	75.0%	269.8	290.5	311.3
5413	Architectural, engineering & related services	2,640	65.0%	70.0%	75.0%	1,716.0	1,848.0	1,980.0
5414	Specialized design services	760	70.0%	75.0%	80.0%	532.0	570.0	608.0
5415	Computer system design & related services	3,070	70.0%	75.0%	80.0%	2,149.0	2,302.5	2,456.0
5418	Advertising & related services	930	65.0%	70.0%	75.0%	604.5	651.0	697.5
71A	Performing arts, spectator sports & related services and heritage institutions	4,490	70.0%	75.0%	80.0%	3,143.0	3,367.5	3,592.0
813A	Grant-making, civic, professional & similar organizations	6,505	65.0%	70.0%	75.0%	4,228.3	4,553.5	4,878.8
Arts & Creative industries Employment total		30,375.0	Winnipeg Jobs			20,490.8	22,009.5	23,528.3
			Winnipeg's share of Manitoba's total			67.5%	72.5%	77.5%
All-industries Employment Total		632,405						
Arts & Creative industries share of All-industries Employment total		4.8%						

Data Source: Statistics Canada Table 36-10-0489-01

Table 7:									
Manitoba Arts and Creative Industries: Direct Real 2018 GDP at Basic Prices									
2012 Chained Dollar Millions									
NAICS Codes	Description	Manitoba	Winnipeg share of GDP			Winnipeg GDP Estimates			
		2018 Real Direct GDP							
		2012 Chained \$ Millions							
			Low	Medium	High	Low	Medium	High	
323	Printing manufacturing	257.2	65.0%	70.0%	75.0%	167.2	180.0	192.9	
451	Sporting goods, hobby, book & music stores	102.0	70.0%	75.0%	80.0%	71.4	76.5	81.6	
511	Publishing industries	171.9	65.0%	70.0%	75.0%	111.7	120.3	128.9	
512	Motion Picture and video industries	42.5	75.0%	80.0%	85.0%	31.9	34.0	36.1	
515	Broadcasting except internet	139.6	75.0%	80.0%	85.0%	104.7	111.7	118.7	
516	Internet publishing and broadcasting								
519	Other information	40.7	65.0%	70.0%	75.0%	26.5	28.5	30.5	
5413	Architectural, engineering & related services	521.6	65.0%	70.0%	75.0%	339.0	365.1	391.2	
5414	Specialized design services	22.8	70.0%	75.0%	80.0%	16.0	17.1	18.2	
5415	Computer system design & related services	306.1	70.0%	75.0%	80.0%	214.3	229.6	244.9	
5418	Advertising & related services	73.5	65.0%	70.0%	75.0%	47.8	51.5	55.1	
71A	Performing arts, spectator sports & related services and heritage institutions	216.2	70.0%	75.0%	80.0%	151.3	162.2	173.0	
813A	Grant-making, civic, professional & similar organizations	319.0	65.0%	70.0%	75.0%	207.4	223.3	239.3	
Arts & Creative industries Real GDP total		2,213.1	Winnipeg Real GDP			1,489.1	1,599.7	1,710.4	
			Winnipeg's share			67.3%	72.3%	77.3%	
All-industries Real GDP Total		62,732.1							
Arts & Creative industries share of All-industries total		3.5%							

Data Source: Statistics Canada Table 36-10-0402-01