The Economic Impacts of Indigenous Art in Canada

Estimating Impacts and Identifying Opportunities

PREPARED BY BIG RIVER ANALYTICS
JUNE 19, 2020

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Acknowledgement

We would like to acknowledge and thank the Indigenous artists from across Canada and members of the Indigenous Arts Economy Project Advisory Group for participating in the project. They were generous with their time, insights, and stories. We'd also like to thank Indigenous Services Canada for their support in undertaking this work.

Specifically, we would like to thank Advisory Group members and guests for their input and participation in the project:

Dawn Setford, *Aboriginal Arts Collective of Canada and Pass the Feather*

Raymond Sewell, *Artist*

Claire Marchand, *Canada Council for the Arts*

Samuel Generoux, *Canadian Heritage*

Rowena House, *Craft Council of Newfoundland and Labrador*

Jonathan Dewar, *First Nations Information Governance Centre*

Colby Delorme, *Imagination Group*

Sage Paul-Cardinal, *Indigenous Fashion Week Toronto*

Jesse Wente, *Indigenous Screen Office*

Charlie G. Sark, *UPEI*

Alysa Procida, *Inuit Art Foundation*

Christian Spence, *Inuit Tapiriit Kanatami*

Kevin Loring, *National Arts Centre*

Tara Saunders , *Indigenous Tourism Association Canada*

John Christou, *National Film Board*

Johanna Tiemessen, *NWT Arts*

Sandra Sutter, *Métis Musician*

Sally Webster, *Elder & Guest*

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1. Executive Summary

The purpose of this study is to estimate the total economic impact of Indigenous art in Canada, and to identify how Indigenous art could play a larger role in contributing to the economic well-being of Indigenous peoples. Indigenous art is central to the culture and spirituality of Indigenous peoples, and it is key to the cultural preservation and resurgence, communication, and expression of First Nations, Métis, and Inuit in Canada. Given the intrinsic and social value of Indigenous art, solely examining the economic impact of artistic activities will unavoidably understate its overall importance.

To estimate the economic impact of Indigenous art, it is useful to consider artistic endeavours as a production process like any other industry. When artistic endeavours are viewed from this lens, established economic methods can be applied to estimate and value artistic activities and outputs in terms of employment and Gross Domestic Product (GDP).

Indigenous artists produce art for a variety of reasons. In studying the economic impact of the Indigenous art economy, we focus on those artists who produce art for income or consumption. **Production for income** refers to art produced for sale, either as the artist's sole source of income or to supplement the artist's income. **Production for consumption** refers to art produced for the artist themselves or the artist's family's direct use. Although there are many employment opportunities and roles in the broader arts sector, economic impact assessments focus on incremental impacts directly attributable to artistic production, that is, income derived from the sale of art, dollars spent on supplies, materials, or other inputs required to produce art, and the downstream impacts of that income further circulating in the economy (Watson et al., 2007).

In this report, we model the production of art for either consumption or income to measure the economic impacts of the Indigenous arts economy. We estimate economic impacts of art in two different ways, by measuring the:

- Total economic impact, that is the indirect, direct, and induced impacts of Indigenous art to GDP; and
- Full-time equivalent (FTEs) jobs that can be attributed to the Indigenous arts economy.

Additionally, we draw on qualitative research to interpret and contextualize our quantitative estimates. Specifically, we draw on Case Study interviews conducted with 23 Indigenous artists and industry leaders across Canada[1], as well as direction from the project's Advisory Group. Our research method and approach were informed by a literature review, previous work completed on the Inuit arts economy, engagement with artists, and by the advice of the project's Advisory Group. The Advisory Group was composed of artists, executives, experts, and government officials in the Indigenous arts sector. Qualitative research served to contextualize our findings, as well as to identify ways to expand opportunities for Indigenous artists to benefit economically from their art.

[1] **Note:** Please refer to Appendix A4 for the biographies and contact information of some of our Case Study participants.

We find that Indigenous art contributed just over $1 billion to the Canadian economy in 2018 (Table E1). Indigenous artists directly earned (net of expenses) a total of $486 million by selling and distributing traditional arts and crafts, by producing film, theatre, music, and other performances, by creating fine arts and other visual arts, by writing and publishing, and by engaging in other artistic pursuits. To create these works, Indigenous artists and other industry participants purchased a number of inputs, including materials, tools, stage bookings, shipping fees, and rentals, among other goods and services[2]. These investments, and the economic activity spurred by them led to an additional $385 million in GDP. In other words, the creativity of Indigenous artists indirectly contributed $385 million to the income of other businesses and individuals across the country. Finally, artists, art companies, and those employed in the production of artistic inputs induced an additional $148 million of economic activity by spending their income and profits on unrelated goods and services, such as food, retail, or entertainment.

Table E1: GDP impacts of Indigenous art, in millions of dollars, by Indigenous identity group, 2018.

Identity	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
First Nations	364	579	678
Métis	93	211	247
Inuit	30	89	104
TOTAL	**486**	**871**	**1,019**

Source: Author's Own Calculations, Big River Analytics 2019 Survey of Artists, Consumers, Retailers, and Wholesalers of Indigenous Art, 2016 Census of Population, 2017 Aboriginal Peoples Survey

By identity group, we see in Table E1 that the total economic impact of First Nations art is estimated at $678 million in 2018. The total economic impact of Métis art and Inuit art are estimated at $247 million and $104 million respectively in 2018. In 2015, Big River Analytics estimated the size of the Inuit arts economy to be $87.2 million (Big River Analytics, 2016). We estimate the economic impacts of Inuit art has increased by 19% over the past three years.

Across identity groups, we estimate that the production and sale of Indigenous art created or supported a total of 23,390 FTE jobs in Canada in 2018 (Table E2). The majority (14,620) of these FTEs are direct, in that they stem from payments made to artists net of expenses. In other words, we estimate that there are an equivalent of 14,620 FTE positions supported by the sale Indigenous art, and an additional 5,830 FTEs were made possible through the demand for inputs to artists production. Additionally, the economic activity, including the money spent by artists and people earning income by providing support services and goods to artists, supports 2,940 FTEs in other sectors and industries.

[2]**Note:** The broader arts sector, including, for example, positions at the Canada Council of the Arts, are not captured by these calculations.

Table E2: Direct, indirect, and induced FTE impacts of Indigenous art, by identity, 2018.

Identity	Direct FTE Impact	Direct & Indirect FTE Impacts	Direct, Indirect, and Induced FTE Impacts
First Nations	11,020	14,120	16,070
Métis	2,710	4,610	5,320
Inuit	910	1,850	2,150
TOTAL	**14,620**	**20,450**	**23,390**

Source: Author's Own Calculations, Big River Analytics 2019 Survey of Artists, Consumers, Retailers, and Wholesalers of Indigenous Art, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

We know that there were actually over three times as many artists producing art for income in 2018 who collectively contribute to the total employment and GDP impacts of Indigenous art (see Table E3). We estimate that a total of 244,340 artists are producing art for themselves or for their family's direct use, and 44,840 artists are producing art for sale. Over three quarters of these artists produce art part time and have other sources of income. Of the Indigenous artists producing art for income, on either a full or part time basis, 65.2% are women. That difference widens further when looking at artists producing art for consumption where women represent 70.8% of Indigenous artists producing art for consumption across identity groups.

Table E3: Number of Indigenous artists by identity group and activity, 2018.

Identity	Income	Consumption
First Nations	26,650	130,760
Métis	13,320	101,410
Inuit	5,240	14,710
TOTAL	**44,840**	**244,340**

Note: Total is less than sum of identity groups since individuals may identify as part of multiple identity groups. An individual may also produce art for both income and consumption. In this instance, they are counted under both categories.
Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Across identity groups, Indigenous artists who produce art for income overwhelmingly use direct-to-consumer sales as their primary distribution channel. In other words, Indigenous artists sell 94.0% of their work directly to their customers, rather than relying on retailers or wholesalers to generate sales (see Table E4).

Table E4: Aggregate percentage share of sales by distribution channel for artists who produce art for income, by identity group.

Identity	Direct (%)	Retail (%)	Wholesale (%)
First Nations	93.7	5.2	1.1
Métis	96.7	2.6	0.1
Inuit	92.2	3.9	4.0
TOTAL	**94.0**	**4.7**	**1.3**

Source: Big River Analytics 2019 Survey of Indigenous Artists, Consumers, Retailers, and Wholesalers, Author's Own Calculations

Of the artistic media groupings explored, visual arts and crafts had the highest total and direct economic impact relative to performing arts and film, media, writing, and publishing, which both contributed similar direct GDP impacts ($139 and $129 million respectively) (see Table E5). Visual arts and crafts also showed the largest indirect impact ($204 million), followed by performing arts ($130 million), then film and media ($51 million). Induced impacts were smaller for all media groups, ranging from $72 million for visual arts and crafts, to $30 million for film, media, writing and publishing.

Table E5: Total, direct, indirect, and induced impacts, GDP in millions of dollars, by media group, 2018.

Media Group	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
Visual arts and crafts	218	422	494
Performing arts	139	269	315
Film, media, writing & publishing	129	180	210
TOTAL	**486**	**871**	**1,019**

Source: Author's Own Calculations, Big River Analytics 2019 Survey of Artists, Consumers, Retailers, and Wholesalers of Indigenous Art, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

The economic impact of Indigenous art is one facet of its overall impact. Our qualitative research highlighted key considerations for interpreting these estimates. First, the economic impact of Indigenous arts is large, and part of an even larger Indigenous arts sector that likewise contributes to the Canadian economy. Second, our estimates are likely conservative, as many Indigenous artists incur costs, and generate economic activity through non-monetary exchanges, like barter and trade. Third, Indigenous artists' relationships to art, including using art to generate income, are diverse. Many artists view the economic benefits of their art as one small component of the broad social, intrinsic, cultural, spiritual, and health benefits of their artistic practice. Fourth, although artists are diverse in their motivations, for many individuals and communities, Indigenous art provides an important source of income and economic activity, for instance, in rural and remote communities, where other forms of employment and income are limited. Lastly, the Indigenous arts economy is large, but has even greater potential should the systemic barriers currently in place be eliminated.

Our research identified a number of opportunities for stakeholders, including government, to expand the Indigenous arts economy for the benefit of Indigenous peoples. Many opportunities, in particular, legislative changes or the creation of new legal mechanisms, would have implications that extend far beyond the economic impacts of Indigenous art. Given the central importance of art to Indigenous peoples, cultures, and communities, our recommendation is that these opportunities be considered and more fully developed with the broader social and cultural benefits of Indigenous art in mind and with the input and direct participation of Indigenous peoples.

We identified opportunities under three broad categories:

1. Unlocking economic benefits for Indigenous artists.

Here, we identify opportunities to connect artists with additional information and resources to increase the opportunities they have to benefit economically from their art. This includes connecting artists with mentors, programs, or individuals to help them navigate selling art while increasing access to resources like funding, low cost studio spaces, or spaces for collaboration. Case Study participants and Advisory Group members shared that change is required to existing programming and funding as it can be difficult for artists to access.

2. Increasing public awareness of Indigenous art and fostering a consumer culture that values Indigenous art; and

This category discusses the need to foster a consumer culture that values Indigenous art. In particular, we stress the need to raise the public's awareness and understanding of Indigenous art and culture, and the costs of inauthentic arts. Inauthentic Indigenous art is assumed to capture huge shares of the Indigenous arts market in Canada, thereby diverting economic benefits away from Indigenous artists. We discuss opportunities to increase the visibility of Indigenous art and culture, enable consumers to make more informed choices, promote the sale of authentic goods, and better respond to the prevalence of inauthentic Indigenous art on the market.

3. Addressing systemic barriers that continue to hinder Indigenous artists.

Lastly, we discuss changes that could address systemic barriers Indigenous artists face. Specific opportunities identified by Case Study participants and Advisory Group members included the equal treatment of Indigenous culture in legislation, addressing the inability of artists to benefit from the resale of their art; creating new or modifying existing tax codes to resolve tax disincentives; enabling the sale of art made from seal fur and other harvested materials to reach international markets; and creating more opportunities for Indigenous peoples to be supported in leadership roles in government, arts organizations, and other decision making bodies.

The economic impact of Indigenous art is only one facet of its overall impact. Understanding the current and identifying potential economic impact of Indigenous art matters wherein it can provide decision makers and advocates with the tools and information to help foster an environment that is more conducive to Indigenous peoples benefiting economically and socio-culturally from their art. Additionally, identifying opportunities to enhance the economic impact of Indigenous art can lay the foundation for increased economic inclusion and improved economic well-being of Indigenous peoples that is grounded in the strength and resilience of Indigenous cultures. Expanding the Indigenous arts economy can also lead to broader desirable social outcomes, supporting reconciliation with Indigenous peoples, and has the potential to reimagine Canada's cultural identity to more fully acknowledge, uphold, and value the contribution of Indigenous peoples and cultures.

2. Introduction

The purpose of this study is to estimate the total economic impact[3] of Indigenous art in Canada, and to identify how Indigenous art could play a larger role in contributing to the economic well-being of Indigenous peoples. Indigenous art is central to the culture of Indigenous peoples, and key to the cultural preservation and resurgence, communication, and expression of First Nations, Métis, and Inuit in Canada. Given the intrinsic social and spiritual value of Indigenous art, solely examining the economic contribution of artistic activities will unavoidably understate its importance.

Indigenous artists have been producing art since time immemorial, and the Indigenous arts economy long predates contact and the arrival of settlers (Canada Council for the Arts, 2008; Le Dressay, Lavalle, and Reeves, 2010). Indigenous peoples produced art for their own personal or communities' use and enjoyment. Art and cultural output were also produced for trade with neighbouring communities, or to be redistributed through communities' governance structures and cultural events, like the Potlatch ("Potlatch", n.d.). What many refer to as "art" in the Euro Western paradigm of fine art are in fact practices integral to or that have emerged from Indigenous peoples' spiritual and cultural fabric.

Indigenous artistic practice, along with any economic activity it spurred, was severely disrupted with the arrival of settlers and the establishment of colonial policies. In some instances, Indigenous art and inputs to Indigenous art were more actively traded in response to settler and European demand. In other instances, art and cultural practices were treated with hostility, outrightly banned, or appropriated for the use and benefit of colonial society (Truth and Reconciliation Commission of Canada, 2015). Additionally, systemic barriers were established that continue to impact Indigenous peoples' capacity to benefit economically from their artistic endeavours. Today, there is a growing market for and interest in purchasing Indigenous art and experiencing Indigenous culture from both Indigenous and non-Indigenous consumers, domestically and internationally.

The economic impact of Indigenous art is only one facet of its overall impact. Understanding the current and identifying the potential to increase the economic impact of Indigenous art can provide decision makers and advocates with the tools and information to help foster an environment that is more conducive to Indigenous peoples benefiting economically and socio-culturally from their art. Additionally, identifying opportunities to enhance the economic impact of Indigenous art can lay the foundation for increased economic inclusion and improved economic well-being of Indigenous peoples that is grounded in the strength and resilience of Indigenous cultures. Expanding the Indigenous arts economy can also lead to broader desirable social outcomes, supporting reconciliation with Indigenous peoples, and has the potential to reimagine Canada's cultural identity to more fully acknowledge, uphold, and value the contribution of Indigenous peoples and cultures.

[3] **Note:** In other words, the extent to which Indigenous peoples' artistic endeavors are a source of employment and contribute to national GDP.

2.1 Project Approach

This project builds on a previous study completed by Big River Analytics on the economic impact of the Inuit arts economy (see Big River Analytics, 2017) by extending the scope of the assessment to include Métis and First Nations art being produced across Canada. We also draw on qualitative research to interpret and contextualize our quantitative estimates. Specifically, we draw on Case Study interviews conducted with 23 Indigenous artists and industry leaders across Canada.

Our research method and approach were informed by a literature review, previous work completed on the Inuit arts economy, engagement with artists to test survey questions and assumptions, and by the advice of the project's Advisory Group. The Advisory Group was composed of artists, executives, experts, and government officials in the Indigenous arts sector.

A review of the literature shows that there are few studies that assess the economic impact of the arts and/or culture industries in Canada. No studies were found that estimate the economic impact of Indigenous arts nationally in Canada. The regional or media-specific reports that do exist rely on administrative data associated with government funding, meaning that individuals and organizations not receiving funding are excluded from the analysis (Big River Analytics, 2019). As such, our approach modifies and builds on the methodology applied to Inuit art in 2017 to capture the impacts of all Indigenous art in Canada.

2.2 Who Did We Listen to and What Did We Hear?

For the purposes of this report, the term Indigenous is a collective noun that refers to First Nations, Métis, and Inuit, the original inhabitants of the land that is commonly called Canada.[4] Where possible, we use specific community names in addition to or instead of these collective nouns.

In order to produce estimates of the economic impact of Indigenous art and to identify opportunities to enhance its economic impacts, we relied on information, advice, and guidance from a number of sources. Our primary sources of information include:

1. Conducting a national survey of over 8,800 artists, consumers, and wholesalers and retailers of Indigenous art;
2. Accessing detailed tables from the 2016 Census of Population and the 2017 Aboriginal Peoples Survey (APS);
3. Seeking the advice and expertise of the project's multi-sector Advisory Group; and
4. Speaking to artists and industry leaders directly (hereafter: "Case Study participants").

Findings from each source are integrated throughout the report. A separate methodological report is available, which details our approach to data collection and analysis.

[4] **Note:** Refer to Appendix A.2 for maps of culturally relevant geographies by identity group.

Before we continue, we want to acknowledge and center some of the conversations we had with Indigenous artists across Canada. First, it is important to highlight that the interviews we conducted were purposefully semi-structured: participants were encouraged to share openly and to speak to the issues or topics they felt were relevant and important. Artists spoke at length about their motivations for making art, the influence of their families and ancestors, the challenges they faced in forging new paths, their hesitation with the very concept of being an "artist", the power of art to heal, build community, identity, and purpose, the responsibility art brings, and much, much more.

When asked "Do you feel there are appropriate infrastructure, policies, legislation, and programs in place to support Indigenous arts in Canada?" artists were often unapologetically political, refusing to be specific to the economic focus of the project. Instead, many artists demanded that attention be paid to the broader socio-economic, historical, and political context that Indigenous artists, Indigenous people, and Indigenous communities have and continue to resist and move through.

The artists we spoke with often defied the categorizations that are so useful when approaching a study of this kind from an economic perspective. Many of the artists we engaged are interdisciplinary, identify and interact with traditional and contemporary approaches to art in diverse ways, and their inputs and processes were not always readily quantifiable from an economic perspective.

We draw on these conversations and share insights, stories, and quotes from artists throughout the report in an attempt to do justice to the rich, very human, very personal, and often very political context in which Indigenous art is created.

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

3. Economic Impact Assessment Findings

Indigenous artists produce art for a variety of reasons. These reasons may be spiritual, cultural, economic, or personal among others. In studying the impact of the Indigenous art economy, we focus on those artists who produce art for income or for consumption. Production for income refers to art produced for sale, either as the artist's sole source of income or to supplement the artist's income. Production for consumption refers to art produced for the artist themselves or the artist's family's direct use. In this report, we model the production of art for either consumption or income to measure the economic impacts of the Indigenous arts economy.

We estimate economic impacts of art in two different ways, by measuring the:

- Total economic impact in terms of GDP, that is the indirect, direct, and induced impacts of Indigenous art; and
- Number of full-time equivalent (FTEs) jobs that can be attributed to the Indigenous arts economy.

Estimating the economic impact of Indigenous art begins with determining the number and types of artists. We then identify the relevant inputs and processes through which art is created for each artistic medium. Lastly, we value the inputs, outputs, and supporting activities in artistic production to model the creation of art and its supporting activities as an economic process.

Where appropriate, we draw connections between our findings and additional information collected through Case Study interviews, Advisory Group meetings, and primary and secondary data sources. We follow our primary impact assessment findings with a discussion of trends and differences within the Indigenous arts economy, including a discussion of differences across artistic media and the socio-demographic characteristics of artists themselves. For many of the findings in Sections 3 and 4, we present additional detailed charts and tables by identity group and by geographic region in Appendix A2.

3.1 Direct, Indirect, Induced, and Total Economic Impact of Indigenous Art

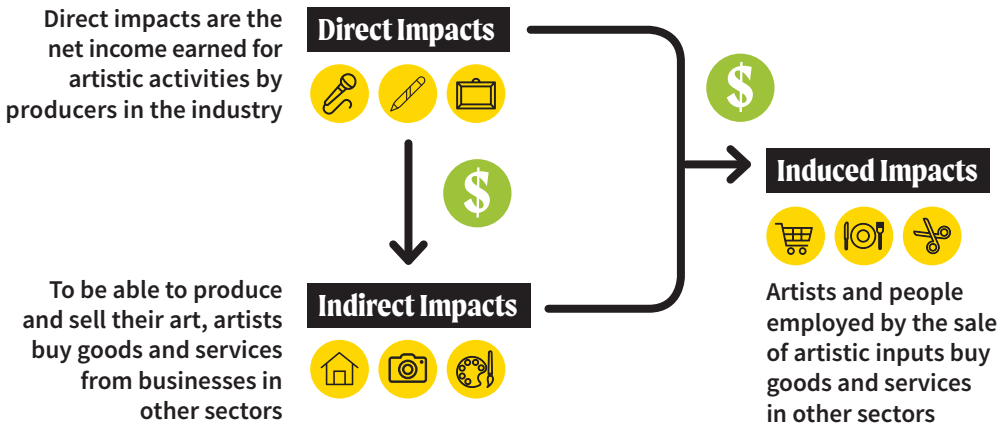
The total economic impact of the Indigenous arts economy includes the direct, indirect, and induced impacts of Indigenous art produced by First Nations, Métis, and Inuit artists for production or for consumption (illustrated in Figure 3.1).

The total economic impact is the sum of the:

- Net income earned by First Nations, Métis, and Inuit artists, that is income earned by selling their art net of all art related expenses. These are direct impacts, as these earnings are only possible from the sales or consumption of their art;

- Money artists and producers spent purchasing goods and services needed to make art. These are indirect impacts, as they would not have been purchased otherwise, were there not a demand for the art to be produced; and
- Money that artists and producers of inputs who were directly and indirectly involved in the creation of art went on to spend on goods in services in other sectors. These are induced impacts, as artists and producers' disposable income is only made possible by the demand for art and its inputs.

Figure 3.1: Types of impacts included in economic impact assessments



Source: Big River Analytics, 2019 Adaptation

3.1.1 Indigenous Artists Producing for Income or Consumption

An accurate estimate of the number of Indigenous artists is needed to understand the size of the Indigenous arts economy. Table 3.1.1 shows the number of First Nations, Métis, and Inuit artists who produced art for income or for consumption in 2018. Across identity groups, we can see that many more artists are producing art for consumption rather than to generate an income. According to our estimates, 244,340 artists are producing art for themselves or for their family's direct use, and 44,840 artists are producing art for sale.

Table 3.1.1: Number of Indigenous artists by identity group and activity, 2018.

Identity	Income	Consumption
First Nations	26,650	130,760
Métis	13,320	101,410
Inuit	5,240	14,710
TOTAL	**44,840**	**244,340**

Note: Total is less than sum of identity groups since individuals may identify as part of multiple identity groups. An individual may also produce art for both income and consumption. In this instance, they are counted under both categories.
Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

In 2016, we estimated the number of Inuit artists producing art for consumption to be 9,420 and for income to be 4,230 (Big River Analytics, 2017). Our most recent estimates presented in Table 3.1.1 show a substantial increase over the past few years.

Advisory Group members highlighted the larger proportion of individuals producing for consumption versus income may be reflective of the cultural and spiritual importance of Indigenous art. Case Study participants echoed this finding, as, although many did produce art for sale, they often shared that their artistic production was driven by cultural, political, and personal, rather than economic, motives.

Of Indigenous artists who produce art for either income or consumption across identity groups, the majority are women. Of the Indigenous artists who produce art for income, 65.2% are women. That difference widens further when looking at artists producing art for consumption where women represent 70.8% of Indigenous artists producing art for consumption across identity groups. This difference is most pronounced among Inuit, where 81.6% of Inuk artists producing art for consumption are women.

Detailed tables on the number of Indigenous artists by activity and by region can be found in Appendix A2.

3.1.2 Total Economic Impacts of Indigenous Art

With the estimated number of artists in hand, we can turn to modelling the artistic production process. Table 3.1.2 outlines the economic impact (or GDP), in millions of dollars, of Indigenous art, by Indigenous identity group in 2018.

Indigenous art contributed approximately $1 billion to the Canadian economy in 2018. Indigenous artists directly earned (net of expenses) a total of $486 million by selling and distributing traditional arts and crafts, by producing film, theatre, music, and other performances, by creating fine arts and other visual arts, by writing and publishing, and by engaging in other artistic pursuits. To create these works, Indigenous artists and other industry participants invested in a number of inputs, including materials, tools, stage bookings, shipping, and rentals, among other goods and services.[5] These investments, and the economic activity spurred by them, led to $385 million in indirect GDP. In other words, the creativity of Indigenous artists indirectly contributed $385 million to the income of other businesses and individuals across the country. Finally, artists, art companies, and those employed in the production of artistic inputs induced an additional $148 million of economic activity by spending their income and profits on unrelated goods and services, such as food, retail, or entertainment.

[5] **Note:** The broader arts sector, including, for example, positions at the Canada Council of the Arts, are not captured by these calculations.

Table 3.1.2: GDP impacts of Indigenous art, in millions of dollars, by Indigenous identity group, 2018.

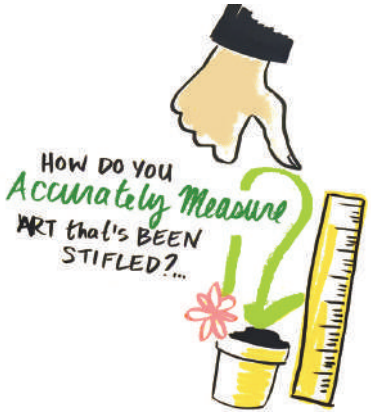
Identity	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
First Nations	364	579	678
Métis	93	211	247
Inuit	30	89	104
TOTAL	**486**	**871**	**1,019**

Source: Author's Own Calculations, Big River Analytics 2019 Survey of Artists, Consumers, Retailers, and Wholesalers of Indigenous Art, 2016 Census of Population, 2017 Aboriginal Peoples Survey

By identity group, we see in Table 3.1.2 that the total economic impact of First Nations art is estimated at $678 million in 2018. The total economic impact of Métis art and Inuit art are estimated at $247 million and $104 million respectively in 2018. In 2015, Big River Analytics estimated the size of the Inuit arts economy to be $87.2 million (Big River Analytics, 2016), a 19% increase in total economic impacts over the past three years.

In sum, the estimated economic impact of Indigenous art is large, and Case Study participants and Advisory Group members shared enthusiastically about the potential of Indigenous art to serve as an alternative, sustainable economy in Canada. Beyond the numbers, they highlighted the need to interpret economic estimates within the broader historical and contemporary contexts in which Indigenous art is produced. In particular, the estimates presented in Table 3.1.2 reflect the efforts and success of Indigenous artists to revitalize traditions that were relentlessly pushed to the brink by colonialism (Noisecat, 2019).

The Indigenous arts economy and arts sector have been historically underfunded, appropriated for the benefit of others, or sidelined. As such, we surmise that the Indigenous arts economy is a source of economic activity that is currently largely untapped. We expect that the removal of systemic barriers[6] that have resulted in economic exclusion would allow for the Indigenous arts economy to continue to grow and expand, with the potential to become an economy that excites people, one that brings people together, and one that amplifies culture.



Source: Advisory Group Meeting #3 Graphic Recording by Jordana Globerman, 2019

Summary

Considerations:

The Indigenous arts economy is large but has even greater potential. The Indigenous arts economy and arts sector have been historically underfunded, appropriated for the benefit of others, or sidelined. Removing systemic barriers and achieving equity for Indigenous artists would enhance untapped economic opportunities for Indigenous peoples.

[6]**Note:** Our discussions with Case Study participants and the Advisory Group shone a light on the systemic barriers that impact Indigenous artists. These are explored throughout the report, and specific recommendations pertaining to those conversations are presented in Section 5.0.

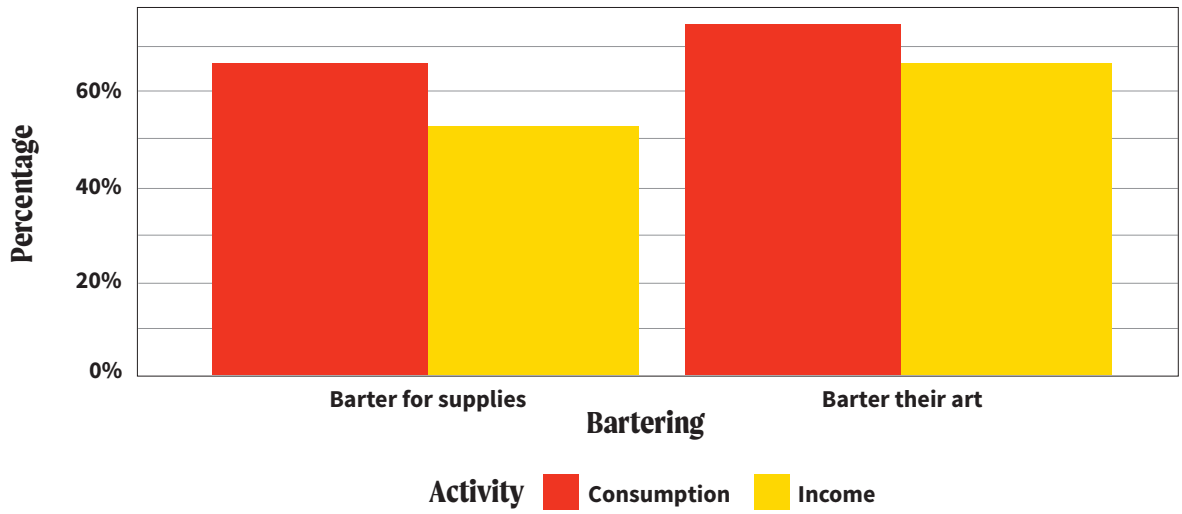
3.1.3 Interpreting Economic Impacts & Related Opportunities

Running parallel to Table 3.1.2 is a discussion on how to unpack and contextualize the numbers, guided by our primary data collection as well as our conversations with the Advisory Group and Case Study participants. To start, our estimates of the total economic impact of Indigenous art can be thought of as a lower bound, conservative estimate for two reasons: barter and trade, and harvested materials.

In effect, both survey respondents and Case Study participants shared that they barter and trade for the inputs and supplies used to produce art, as well as the output of their artistic production. For Case Study participants working in visual arts in particular, trading materials is prevalent within families. This is relevant to our discussion of economic impacts because materials and art acquired or sold through barter and trade[7] are difficult to quantify in terms of either income generated, or costs associated with the production of art but constitute an economic benefit to artists and the arts economy.

Figure 3.1.3 explores the extent to which Indigenous artists[8] barter and trade in the production and distribution of their art. By activity, artists who produce art for consumption are more likely to trade or barter their art than those artists who produce art for income. In effect, 65.1% of Indigenous artists who produce art for income trade or barter their art, compared to 74.0% of Indigenous artists who produce art for consumption. Artists who produce art for consumption are also more likely than those who produce art for income to barter for supplies: 66.1% to 52.7% respectively.

Figure 3.1.3: Percentage of Indigenous Artists Who Trade or Barter their Art or Supplies, and Average Percentage of Total Value of Supplies Obtained by Trade or Barter, by Activity.



Source: Big River Analytics 2019 Survey of Indigenous Artists, Consumers, and Retailers and Wholesalers, Author's Own Calculations

[7] **Note:** To barter and trade is to exchange goods and services without the use of money.
[8] **Note:** The data presented in Figure 3.1.3 captures survey respondents rather than Case Study participant insights.

Source: Advisory Group Meeting #3 Graphic Recording by Jordana Globerman, 2019

> **"I'm lucky to have access to my traditional territory, and to know hunters and trappers I can purchase or trade materials with, but not everyone does."**
>
> *— Talitha Tolles*

Source: Big River Analytics 2019 Case Study Interview

In addition, Indigenous artists use art materials and supplies that are not readily acquired through the market economy, which makes them difficult to value in terms of their costs. For instance, several Case Study participants mentioned that they use traditional materials, including materials harvested from the land, in their art. When these materials are purchased, the associated impacts are more readily computed in economic estimates. When individuals harvest these inputs themselves, however, the economic impact of those materials needs to account for any associated costs. For example, this could include the gas or transportation costs required for artists to go gather materials. Case Study participants and Advisory Group members confirmed artists are likely to underestimate the full costs of things like gas or materials that are associated with harvesting materials. Many Indigenous people understand time spent on the land gathering materials or travelling to their home community to learn their craft as invaluable, a spiritual, family, or cultural practice that they may not price or categorize as a cost associated with artistic production.

When considering the economic impacts of Indigenous art, Advisory Group Members and Case Study participants stressed the need to ground impacts at the level of the individuals and communities producing art. Namely, they stressed the need to ensure that the economic benefits of Indigenous art are only valued in so much as they translate to direct benefits and improvements in the quality of life of Indigenous peoples.

Looking at the individual level, art constitutes an important source of income, in particular in regions where employment opportunities are limited. The majority of Indigenous artists are earning income from their art, as well as other sources, and Indigenous artists' relationship to art as a means to generate income are diverse. Indigenous artists who produce art for income make, on average, $10,842 from selling their art (see Table 3.1.3) net of costs.[9] One quarter (24.3%) of artists producing art for income were full-time artists, that is, they had no other form of income. Artists who produce art full-time make a net average income of $32,674.

Table 3.1.3: Mean Net Earnings and Art Activities as Sole Source of Income, Indigenous Artists who Produced Art for Income, 2018.

Identity	First Nations	Métis	Inuit	All
Average net income from art ($)	13,673	6,986	5,646	10,842
Average net income from art for full-time artists ($)	40,244	10,388	8,957	32,674
Percentage with art activities as sole source if income ($)	29.1	16.0	21.8	24.3

Note: Full-time artists are defined as individuals who produced art as their sole source of income and who produced art for sale on a weekly basis, or who were employed in an occupation related to film, media, writing, or publishing.
Source: Author's Own Calculations, Big River Analytics 2019 Survey of Artists, Consumers, Retailers, and Wholesalers of Indigenous Art, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Our findings align with other studies exploring the income and employment of Indigenous artists. The 2019 Aboriginal Peoples Television Network (APTN) study on Indigenous music also found that, annually, almost half (47%) of income earned by Indigenous music artists derives from non-music work (APTN, 2019). Stories from Case Study interviews echoed our analysis, as many participants referred to having multiple sources of income, and, generally, are maintaining a full-time job unrelated to their art.

For rural or remote communities, the economic impacts of art are important economic drivers and sources of local income and employment. From a local economy perspective, induced impacts are those dollars entering a region from outside, and the business-to-business activities that result. In this way, induced impacts are important for the overall economic wellbeing of a community. When there are limited sources of income entering a region from outside, the local economy is primarily supporting the basic needs of its residents. When, for instance, Indigenous artists and those who sell goods and services to artists for the production of their art, go on to use parts of their earnings in purchasing goods and services, they support the growth of additional local businesses like barbers or retail jobs. As such, the production and sale of Indigenous art is an important source of income for the individuals who sell art, but also particularly valuable for rural and remote communities where local businesses that are supported by the reinvestment of a portion of those outside dollars.

[9] **Note:** Grant dollars are captured in these figures as artists would have included them in their estimates of their total income in either our survey, the APS, or the Census.

Indigenous artists have diverse motivations for producing art that extend far beyond the economic benefits a sale may provide. For many, systemic poverty is viewed as a primary barrier to producing art, for others, art is a pathway out of poverty, or at least, a pathway to temporary relief from poverty. For some, income simply enables more artistic production but is not the core motivator for their artistic practice. And a number of artists view art as one of the few endeavours in an exchange-based economy that allows them to gain the income they need in a manner that is aligned with their values and culture.

Advisory Group members shared stories of artists, in rural, northern, and urban settings who rely on the income from the production of art to provide for theirs and their family's needs. Individuals shared stories of art being sold significantly underpriced, not even covering the cost of materials, because of a need to survive. Others still shared that art directly enabled their family or community to survive as access to traditional food sources continue to dwindle. Enhancing the economic impact of Indigenous art should acknowledge the differential role that income from art plays for individuals and communities and respond to the broader social and economic conditions Indigenous peoples face.

Source: Advisory Group Meeting #3 Graphic Recording by Jordana Globerman, 2019

Summary

Considerations:

- The estimated indirect economic impact of Indigenous art is large, but a conservative estimate because artists incur costs and produce additional economic benefits that aren't easily quantified, through barter and trade or harvesting.
- Indigenous art is an important source of income and economic activity for many individuals and communities, particularly in the face of systemic poverty.
- The Indigenous arts economy is an important economic driver and source of local income and employment for rural or remote communities.
- Indigenous artists' relationship to art as a means to generate income were diverse. The majority of Indigenous artists earn income from multiple sources. Full time artists make more, on average, from their art than artists with multiple income sources.
- Many Case Study participants underscored systemic poverty as a barrier in the production of art.
- Enhancing the economic impact of Indigenous art should acknowledge the differential role that income from art plays for individuals and communities and respond to the broader social and economic conditions Indigenous peoples face.

3.2 Employment Impacts of the Indigenous Arts Economy

Having looked at and discussed total economic impact in terms of GDP, our second measure of the economic impacts of the Indigenous arts economy is the employment that can be attributed to the production of art, expressed in terms of full-time equivalent jobs (FTEs).[10] In the context of the Indigenous arts economy:

- Direct FTEs from visual and performing artists were estimated using the average net art income ($32,394) earned by "full-time" artists; that is, artists who produced art for income every week and who did not have any other source of income. Direct FTEs from artists in film, media, writing, and publishing were estimated to be the number of Indigenous artists employed in such occupations, according to the 2016 Census.
- Indirect FTEs were estimated by constructing an indirect jobs multiplier (per million dollars of output) for Indigenous artists, based on artists' supply expenditures.
- Induced FTEs were estimated using the full-year earnings ($50,529) implied by the average weekly earnings for Canadian full-time service-sector employees estimated by Statistics Canada's Labour Force Survey (LFS) in 2018; the induced GDP impact was divided by this FTE cost to obtain the induced FTE impact.

Across identity groups, we estimate that the production and sale of Indigenous art created or supported a total of 23,390 FTE jobs in Canada in 2018 (Table 3.2.1). The majority (14,620) of these FTEs are direct, in that they stem from payments made to artists net of expenses. In other words, we estimate that there are an equivalent of 14,620 FTE positions supported by the sale Indigenous art, and an additional 5,830 FTEs were made possible through the demand for inputs to artists production.

Additionally, the economic activity, including the money spent by artists and people earning income by providing support services and goods to artists, supports 2,940 FTEs in other sectors and industries. We know that there were actually over three times as many artists producing art for income in 2018 (see Table 3.2.1) who collectively contribute to the total employment and GDP impacts of Indigenous art. The much lower number of FTEs relative to the total number of artists is driven by the part-time nature of the work for many artists, three quarters of whom have other sources of income, and the overall low average income of Indigenous artists.

Table E2: Direct, indirect, and induced FTE impacts of Indigenous art, by identity, 2018.

Identity	Direct FTE Impact	Direct & Indirect FTE Impacts	Direct, Indirect, and Induced FTE Impacts
First Nations	11,020	14,120	16,070
Métis	2,710	4,610	5,320
Inuit	910	1,850	2,150
TOTAL	**14,620**	**20,450**	**23,390**

Source: Author's Own Calculations, Big River Analytics 2019 Survey of Artists, Consumers, Retailers, and Wholesalers of Indigenous Art, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

[10]**Note:** One FTE is generally equivalent to one person working full-time and is the ratio of total hours worked in a given period of time, to the maximum number of workable hours in that same period.

When we consider the indirect and induced impacts of the Indigenous arts economy, we see that 5,830 FTEs were indirectly created or supported across identity groups, and 2,940 FTEs can be attributed to induced impacts. As a reminder, the indirect impacts include jobs held at retailers and wholesalers, or jobs created at art venues, but not jobs held in the wider arts sector.

With regards to the wider arts sector, occupations related to arts and culture[11] employ 457,660 people in total, 11,940 of whom are Indigenous. Arts occupations account for 2.5% of employment in Canada overall and 1.6% of Indigenous employment (Census, 2016). These include, for instance, employment at organizations that promote the arts, and other corporate and administrative services. Our estimates capture these broader sector-wide economic contributions when:

1. Artists incur direct costs utilizing these services to produce or distribute art, for instance, paying fees for renting a space.
2. The individual employed in the arts sector identifies themselves to be an artist, either in the APS or by identifying an occupation related to film, media, writing, and publishing in the 2016 Census. For instance, an individual employed in the film or theatre industry may or may not identify themselves and their role in the industry as being an artist.

Advisory Group members shared how the rise of Indigenous organizations and the increasing number of Indigenous people in leadership positions in the arts sector have been important in creating more opportunities for Indigenous artists to access funding and reach new audiences. Notwithstanding, the lack of Indigenous representation in leadership positions at Crown Corporations like Telefilm, or funding organizations like Canada Council for the Arts, remains a concern for Case Study participants and the Advisory Group. Case Study participants and the Advisory Group consistently underscored the fact that the government's work, when it comes to upholding Indigenous art in Canada and ensuring Indigenous artists benefit from their art, is the work of decolonization. This change is being achieved by Indigenous peoples within existing organizations but can likewise be facilitated by enabling the creation of more Indigenous-led organizations.

Summary

Considerations:

- The economic impact of Indigenous art is large, and part of an even larger Indigenous arts sector that likewise contributes to the Canadian economy.
- Getting Indigenous people in leadership positions or supporting the growth of more Indigenous arts organizations in the broader art sector can, in turn, enhance the economic impact of Indigenous art.

Source: Advisory Group Meeting #3 Graphic Recording by Jordana Globerman, 2019

[11] **Note:** Occupations are classified using the National Occupations Classification (NOC) codes.

4. Trends & Differences within the Indigenous Arts Economy

The Indigenous arts economy is diverse, with individuals producing art full time, part time, or as a hobby. Art is created for a range of reasons, including connecting with culture and spirituality, and as an avenue for self-expression. To better understand some of these differences, we examine:

4.1: Differences in artists' use of distribution channels, including online platforms;
4.2: Differences in economic impacts by artistic media group; and
4.3: Trends in the characteristics of artists over time.

4.1 Distribution Channels

For some artists, making a piece of art is only part of the puzzle. Once completed, an artist needs to consider if the piece will be used either for their own consumption (or the consumption of family and friends), or if the piece will be sold or traded for income or other supplies. If an artist chooses to sell their work for income, then they must consider how and where to sell it. The way in which an artist chooses to sell their work is what we refer to as a distribution channel. We consider three distribution channels: direct-to-consumer, retail, and wholesale.

Across identity groups, Indigenous artists who produce art for income overwhelmingly use direct-to-consumer sales as their primary distribution channel. In other words, Indigenous artists sell 94.0% of their work directly to their customers, rather than relying on retailers or wholesalers to generate sales (see Table 4.1).

Table E4: Aggregate percentage share of sales by distribution channel for artists who produce art for income, by identity group.

Identity	Direct (%)	Retail (%)	Wholesale (%)
First Nations	93.7	5.2	1.1
Métis	96.7	2.6	0.1
Inuit	92.2	3.9	4.0
TOTAL	**94.0**	**4.7**	**1.3**

Source: Big River Analytics 2019 Survey of Indigenous Artists, Consumers, Retailers, and Wholesalers, Author's Own Calculations

Direct-to-consumer sales for Inuit artists are lower than those of First Nations and Métis artists, but they have increased relative to 2016 (BRA, 2017). In 2016, the percentage share of direct-to-consumer sales for Inuit was 66.9% and has increased to 92.2% for 2018. Of the three identity groups, Inuit artists consistently use wholesale at a higher rate than other distribution channels, reflecting the longstanding, albeit fading, tradition of selling to collectives and co-ops.

4.1.1 Discussion: Online Distribution Channels

The overwhelming reliance on direct-to-consumer sales was echoed by Case Study participants, who rarely mentioned interactions with retailers or wholesalers. While some of the artists we spoke to participate in art festivals, powwows, markets, and events, most rely on word of mouth and social media to promote and sell their work.

> **"Facebook, Twitter, blogs, website, I have it all. Instagram, Tumblr... everything that you could possibly imagine in terms of promotion online. Social media is of huge importance for anyone trying to sell their art or let it be known that they have art."** *— Tara Audibert*
>
> **Source:** Big River Analytics 2019 Case Study Interview

The rise of social media as a direct-to-consumer sale platform can be traced back at least to October 2010, when Facebook introduced "Groups", or pages that can be created by individuals related to a particular topic. In February 2015, Groups instituted a formalized process for the sale of goods and services, increasing their effectiveness as a sales platform. Following the success of these "buy and sell" Groups, Facebook launched Facebook Marketplace in 2016, which further formalized the process (Constine, 2016). Although Facebook was one of the first social media platforms to facilitate these types of sales, many Case Study participants now rely almost exclusively on Instagram for their direct-to-consumer sales and maintain neither an active Facebook page nor a website.

In order to estimate the prevalence and nature of direct-to-consumer sales, we collected data from a number of Facebook Groups between February 2019 and January 2020 (see our Methodological Report for more details). Table 4.1.1 summarizes the aggregate Facebook sales of clothing and footwear, jewelry, and visual art in Canada over that time period. In total, $147,165 worth of sales were conducted through these sites, and the average price of an item sold was $75.39. This suggests that Facebook Groups is primarily used by individuals selling smaller scale or lower value pieces, compared to retailers or wholesalers that are more commonly used for the purchase or sale of high value art.

Table 4.1.1: Facebook Sales by Type of Art, Canada, 2018.

Category	Total	Average Price
Clothing & Footwear	$73,273	$125.90
Jewelry	$16,013	$39.25
Visual Art	$57,878	$60.14
TOTAL	**$147,165**	**$75.39**

Source: Big River Analytics Primary Data Collection (see Methodological Report), Facebook, Author's Own Calculations

Unlike buy and sell groups, transactions that occur in Facebook Marketplace occur between individuals and are not centralized in one place online. Sales made on Instagram are likewise not centralized, and likely occur through user-to-artist Direct Messages. Speaking with Case Study participants and Advisory Group members suggested that a high volume of art, and art that is, on average, of higher value would be exchanged through Direct Messages rather than posts on Facebook Groups. Given these two limitations, we expect that our estimates of the volume and value of social media sales are a lower bound.

Although not used for the purchase of inputs or sale of art directly, performing artists likewise utilize social media platforms. In their 2019 study on Indigenous music, the APTN found that "most artists surveyed use social media (83%) and word-of-mouth (80%) to promote their work. These media are much more widely utilized than more "traditional" (and often paid) marketing tools such as radio or newspaper ads, event listings or posters. Only a minority (42%) have a website that is used to promote their music." (APTN, 2019).

By and large, this reliance on social media indicates the importance of digital entrepreneurial literacy for those artists who are interested in making an income with their art. Case Study participants who engage with these platforms successfully stressed that this requires both training and time to be effective. Additionally, for those artists living in rural or remote communities, the shift away from retailers and wholesalers and towards online distribution reinforces the need for expanded connectivity services across Canada that ensure the digital divide does not place additional barriers on to artists.

Finally, it's important to highlight that, for some Case Study participants, online marketing and social media present unique challenges, including discriminatory policies and shipping constraints. For example, one participant faced barriers to selling and marketing their sealskin pieces on Facebook due to policies that target and limit the sale of sealskin products, regardless of origin. Likewise, the Advisory Group discussed the impact of national and international policies or campaigns on access to traditional materials. Continuing the sealskin example, a decline in the fur industry as a whole, coupled with widespread marketing campaigns denigrating sealskin and seal hunting, has had severe repercussions on demand for sealskin products made by Inuit artists. Shrinking demand has translated into a decline in seal hunting, and as a result, thriving seal populations have decimated the cod population in Newfoundland and Labrador (Bissett, 2019). Developing responses that support the sale of traditionally harvested seal fur to international markets or promoting these products to domestic consumers can revive the broader economy supporting hunting, harvesting, and use of traditional materials.

Summary

Considerations:

- The vast majority of Indigenous artists rely on direct-to-consumer sales as a primary distribution channel, thereby managing the marketing, sales, and shipping or distribution of their products. Case Study interviews suggest that social media platforms are a critical avenue for these sales.
- The reliance on social media indicates the importance of digital entrepreneurial literacy for those artists who are interested in making an income with their art.

Opportunities:

1. Connecting artists to resources that allow them to be effective in the digital sphere. For example, funding Indigenous-run mentorship and apprenticeship programs designed for digital marketing, and specifically social media marketing, website development, accounting, distribution, and other entrepreneurial best practices.
2. Investing in connectivity in rural and remote communities across Canada, with the goal of eliminating the digital divide that hinders artists' access to markets.
3. Advocating for or working with Facebook, Instagram, and Etsy among other organizations to take decisive action in response to the sale of inauthentic art on their platforms.
4. Promote the sale and purchase of authentic products that use traditionally harvested materials both nationally and internationally.

Digital Spaces for Collaboration

"My name is Tenille Campbell. I'm Dene from English River First Nation and I'm Métis from Red River Métis and the Batoche area of Saskatchewan. I am a photographer, founder of sweetmoon photography, and have been doing that for about 10 years. I'm a writer with a published book called #IndianLove: Poems published in 2017. I'm a grad student at the University of Saskatchewan teaching a course this year while also finishing my PhD. And I'm a blogger. I started a blog called tea&bannock which is a collective of eight Indigenous women photographers in Canada."

Growing up, Tenille Campbell saw herself in works from Indigenous authors, poets, and writers from across the country. Today, she is a poetry voice of the North. An Indigenous woman, mother, self-taught photographer, writer, poet, and academic, she is creating novel online spaces that challenge the status quo of colonial systems and narratives. Tenille spoke to us about technology in the Indigenous arts community, and the creation of online spaces for collaboration.

"For me identifying as an Indigenous artist is just an obvious state of walking through this world."

Tenille founded the photo-journalistic blog and online collective tea&bannock to connect with other Indigenous women photographers in the male dominated field of photography. She saw a need for female Indigenous photographers like herself to share their stories, with the aim of creating Indigenous photography, for Indigenous people, shot by Indigenous people. For Tenille, the platform allowed her to showcase the diversity and variations of true Indigenous existence, to hold her own space, and have her own voice. The largest impact tea&bannock has had for the online community is creating the safe space and opportunities for Indigenous women to connect and recognize their similarities.

Tenille explained how digital platforms can be used to reclaim a safe space to connect, share, and advocate online about issues that range from the personal to political. Community, including community online, exists to heal, share experiences, hold space for authenticity, and find support.

"I love technology. My platform in a lot of ways is based in technology, with digital cameras, vlogging, creating online spaces and navigating those online spaces - into native spaces like native Twitter and native Instagram and tea&bannock. These are all native spaces that we've taken over and created in this very trippy online world, and I'm here for it. I love it. I advocate for it. I don't think there's any negativity. I don't think being present online takes you away from being present from your culture at home. I think you can do both."

Tenille views photography and poetry as two channels for storytelling. If storytelling is an age-old tool, it is being practiced through these new mediums, and modern technology allows its spread across physical distance. Tenille's online groups have also often translated to the physical world in the form of meetups and mentorship opportunities.

Digital spaces for collaboration and building community can also be valuable for connecting Indigenous youth with elders, and those on-reserve with those off-reserve in cities or other communities. This can be especially useful for communicating and sharing between those with more or less access to lands and traditional practices.

"I think using those online tools and using these digital spaces is part of navigating our culture to a place where we can still connect with our youth and our elders to creating a bridge to making sure our culture - I'm not going to say dies out, our culture will never die out - that our culture continues to grow in a good way. And continues to reach other people."

Other Case Study participants mentioned using social media to connect and collaborate with other artists, support and mentor emerging artists, for sales and commissions, and to identify inauthentic arts and crafts. While online spaces are limited to interactions through a screen, the platforms can facilitate relationships across geographically distant communities and Nations and lead to in-person connections. Tenille encourages other Indigenous artists to create their own spaces if they see a gap or need to be filled, both off and online.

It should be noted that, for digital spaces in the Indigenous arts community to continue to grow, widespread access to technology and to the internet is required in every community, no matter how remote.

Source: Big River Analytics Case Study Interview, 2019

4.2 Economic Impacts by Artistic Media Group

The production processes, inputs, and distribution channels used by artists vary substantially across artistic media groups. As such, we have categorized each media under groupings that share characteristics as defined by the literature (Nordicity, 2014; Conference Board of Canada, 2008). We estimate the differences in total, direct, indirect, and induced impacts by media group in Table 4.2.

Table E5: Total, direct, indirect, and induced impacts, GDP in millions of dollars, by media group, 2018.

Media Group	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
Visual arts and crafts	218	422	494
Performing arts	139	269	315
Film, media, writing & publishing	129	180	210
TOTAL	**486**	**871**	**1,019**

Source: Author's Own Calculations, Big River Analytics 2019 Survey of Artists, Consumers, Retailers, and Wholesalers of Indigenous Art, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Of the three media groupings, visual arts and crafts had the highest total economic impact ($494 million), followed by performing arts ($315 million), and film, media, writing, and publishing ($210 million) (see Table 4.2.1). A study conducted by the Aboriginal Peoples Television Network (APTN) found that Indigenous music contributed a total of almost $78 million to Canada's economy (GDP) in 2018 (APTN, 2019).

4.2.1 Discussion: Differences between Artistic Media Groups

To better interpret the results presented in Table 4.2, we spoke with artists and Advisory Group members about the differences in experience between artists in each media group.

4.2.1.1 Visual Arts and Crafts

> **"I don't usually introduce myself as an artist. In introducing myself as a craftsperson, I'm honouring my grandparents and my mom for what they taught me."** *— Case Study Participant*

Source: Big River Analytics 2019 Case Study Interview

Visual arts and crafts includes arts and crafts such as carvings and sculptures, clothing and footwear, jewellery, and print graphics. Some visual artists are able to sell and reproduce their design or replicate their work through the use of print. For many of the Case Study participants we »

spoke with, traditional[12] visual arts and crafts (including beading, sewing, and carving) are an opportunity to connect deeply with culture and community. Within that perspective, creating a singular piece is often the end goal, rather than earning an income. Visual arts and crafts can be labour intensive. Several Case Study participants shared that they spend many hours creating a single, unique piece of work. Unlike a recording artist or an author, whose work can be replicated and sold many times at a low marginal cost, artists producing visual arts and crafts, for the most part, invest their time and are paid once for each piece of art they produce (BRA, 2017).

Many Case Study participants expressed frustration at the tension that can exist between traditional ways of production, and market incentives to scale and modernize production as a means to lower costs and maximize profits. For those who can or want to reproduce their art, Advisory Group members shared insights into different models for the sale and reproduction of art and art designs. For example, an artist can sell an image outright for reproduction, or can choose to retain rights to royalties. The Advisory Group stressed that the costs and benefits of these different types of legal arrangements need to be more widely disseminated to artists who may be considering them.

Additionally, access to physical space (in particular spaces equipped with tools and other materials) was highlighted as a very tangible barrier to many Case Study participants' work. Financing physical, Indigenous spaces and infrastructure for artists and community to gather, create, and collaborate would enhance the creative opportunities of many artists.

"I know that I have to make 8 bracelets to cover costs, and anything above that is paying my wage. But it's hard to get people to understand pricing when they do something that's more time consuming. We worked hard for my mom to understand what to charge, and that if people aren't willing to pay that price, to go look somewhere else."

— Case Study Participant

Source: Big River Analytics 2019 Case Study Interview

Artists in this media group regularly expressed the challenges they've faced in pricing their work. Time and material inputs should translate into the final price of a product, but lack of awareness and information in the non-Indigenous population, paired with a flooding of inauthentic goods, act as invisible hands that can force artists to lower their prices. In fact, more than other artists, visual artists and craftspeople expressed the impact of inauthentic art. Participants noted that often inauthentic pieces are reproduced on a mass scale, bearing no ties to culture or tradition, and sold at much cheaper prices than authentic work, thereby undercutting the market price and reinforcing consumers' misconceptions of Indigenous art and culture. Simultaneously, non-Indigenous consumers, accustomed to the cost of these inauthentic goods, regularly engage in forms of tokenism, appropriation, and racism, including bartering with Indigenous artists and pressuring them to lower or defend their prices.

[12] **Note:** Artists we spoke with are also using traditional forms of media such as beading, sewing, and carving to create highly contemporary pieces.

There is no silver bullet to address the prevalence of inauthentic Indigenous art and to create a culture that places more value (in an economic, but also broader sense) on Indigenous art. These two objectives also extend well beyond their economic repercussions for Indigenous artists, and specific actions should be developed with a fuller consideration to the social, intrinsic, and cultural values of art, and be defined, prioritized, and led by Indigenous peoples.

That said, connecting artists with mentors and resources on business development can enable artists to determine pricing processes that better reflect the effort and true cost associated with their production. Running parallel to these initiatives, eliminating inauthentic Indigenous goods from the market through regulation, creating incentives for retailers and wholesalers to only sell authentic art, and raising awareness of and appreciation for Indigenous art and culture among non-Indigenous consumers, would all serve to redirect the economic benefits of Indigenous art back to Indigenous artists and communities.

On the side of the consumer, any fear of appropriation, actual appropriation, lack of awareness, and inability to make informed consumer decisions could be countered with more exposure to Indigenous culture through cultural events and arts festivals led by Indigenous people, through programs or curriculum changes in school systems, and appropriate information and marketing campaigns. In particular, there is a need to ensure that consumers understand the costs and negative impacts of purchasing inauthentic Indigenous art and are readily able to distinguish between art that is produced by Indigenous peoples and inauthentic and appropriated pieces. Increasing support and funding directly available to arts organizations and Indigenous artists can facilitate this cultural shift. A more fulsome discussion of authentication and inauthentic art is included in Appendix A1.

4.2.1.2 Performing Arts

> **"We're using a contemporary medium to talk about Indigeneity. When people think of Indigenous art, they think of paintings, of carvings, of regalia. Burlesque is like what? How does it fit into all of that?"**
>
> *— Sparkle Plenty*

Source: Big River Analytics 2019 Case Study Interview

Performing arts includes performances, live and recorded, such as acting, theatre, dance, and music. Given the nature of performance art, geographic location was identified as an important consideration for artists in accessing the stages and audiences they need to sustain their income. For one participant, moving to an urban setting was an opportunity to access more gigs, and simultaneously, meant moving towards increased competition and a disconnection from their community and culture. Many spoke to the stress and mental health challenges that a geographical relocation can induce for artists, and that these challenges and costs should not be understated. As a result, artists identified Indigenous spaces for artistic collaboration and co-creation, as an opportunity to better support and engage Indigenous performing artists.

The performing artists we spoke with were unique in the relationship they had with their audience relative to other media groups. The nature of performance means that artists are highly visible to their audience, and as a result, performance artists spoke more than others about tokenism. Similar to opportunities identified for visual arts and crafts, raising awareness of and appreciation for Indigenous art and culture among non-Indigenous audiences would serve to address some of the concerns raised by performance artists.

Finally, although the performing artists we spoke with generally seemed encouraged by the demand for their work by non-Indigenous audiences and non-Indigenous producers and stages, the key question raised was one of creative voice and ownership. Who, ultimately, is holding the pen and who ultimately 'owns' and benefits from the output? A lack of Indigenous representation in performance art organizations was identified as a significant concern and barrier, as was the lack of mentorship opportunities to grow a career into these roles. Consequently, investment into mentorship programs, and commitment to representation in art organizations are tangible avenues to clear the way for artists in this media group.

Youth Mentorship & Entrepreneurship

"My name is Chief Lady Bird. That's the spirit name I was given in ceremony, and the name that I go by in my art practice. I come from Rama First Nation and Moosedeer Point First Nation. I sit in the Eagle Clan, and am an Anishinaabe woman, whose pronouns are she/her."

At 18, Chief Lady Bird moved to Toronto to attend the Ontario College of Art and Design (OCAD) and complete her Bachelor of Fine Art in Drawing and Painting, with a minor in Indigenous Visual Culture. She graduated in 2015, and has been freelancing ever since, producing public art installations and participating in numerous exhibitions. As an artist, her practice has the capacity to shapeshift to respond to and meet Indigenous movements across Turtle Island. As an activist, Chief Lady Bird can best be described as a mentor for at-risk youth and emerging artists living in Toronto. We spoke to her about her journey as an artist, her experience of art entrepreneurship, and the importance of mentorship within an urban context.

"I need to create to live and survive. For me it's a form of "survivance", which is a concept created by Gerald Vizenor that goes beyond survival."

Today, Chief Lady Bird is a successful business owner and artist, but she did not learn the entrepreneurial skills that have helped her reach her professional goals in school. Unable to access saturated courses, Chief Lady Bird turned instead to collaboration with the Indigenous arts community, and external training through the Business in the Streets program.

"I was left graduating without those skills and was forced to learn them myself. The way I was able to was through collaboration within the Indigenous arts community because there is that sense of lateral love and [a] want to uplift each other that we just have naturally that is part of our teachings and part of our culture."

Chief Lady Bird now makes a point to share what she learned about art entrepreneurship with others in the Indigenous arts community looking to develop their business acumen. She believes community building and mentorship for Indigenous artists in urban settings are driven by the disconnection from and reclaiming of culture, and identifies long-lasting and consistent relationships as key characteristics for mentorship programs.

In particular, Chief Lady Bird sees a strong need for mentorship opportunities for Indigenous youth in cities. To satisfy this need, Chief Lady Bird previously collaborated to create a program which provided mentorship opportunities to young Indigenous artists. The stereotype of not being able to survive as an artist is often instilled onto young artists, both Indigenous and non-Indigenous. While the challenging realities of this career path should not be diminished, the work of young Indigenous artists is too important to discourage them.

"I always tell young people, if this is what you want you can do it, but you have to put the work in because there are a lot of forces out there that are going to try to tear you down. And that's also why we try to build up a sense of community and mentorship too. So we can stand behind them and support them. It's the same way that our ancestors are always standing and walking behind us."

While Chief Lady Bird and other artists are running their own mentorship programs to satisfy a need in the Indigenous arts community, there remains a need for reliable, consistent, and sustainable funding for long-lasting Indigenous-led mentorship programs. Funding should reflect the true value of Indigenous art, which is often undervalued and underfunded relative to non-Indigenous art.

Source: Big River Analytics Case Study Interview, 2019

4.2.1.3 Film, Media, Writing, and Publishing

> **"I hear a lot of talk about the importance of getting Indigenous people to play Indigenous characters, trans to play trans characters. I certainly think that's better. But I think it's more important to have Indigenous folks writing and directing, rather than having their faces put on someone else's story."** *— Smith Purdy*

Source: Big River Analytics 2019 Case Study Interview

With regards to film, media, writing, and publishing, Advisory Group members expressed particular concern about data collection. In sum, data on Indigenous film and screen media is not adequately collected at the national level,[13] which is reflective of the broader systematic treatment of Indigenous film in Canada. For instance, the 1991 Broadcasting Act states that the Canadian broadcasting system should "through its programming and the employment opportunities arising out of its operations, serve the needs and interests, and reflect the circumstances and aspirations, of Canadian men, women and children, including equal rights, the linguistic duality and multicultural and multiracial nature of Canadian society and the special place of aboriginal peoples within that society" (Broadcasting Act, 1991). Yet, apart from the APTN, only a select couple broadcasting bodies in Canada exist that produce Indigenous content on-screen. Examined further, some Indigenous filmmakers, such as francophone Indigenous filmmakers, face even more challenges relative to their anglophone counterparts, including less access to funding and exposure.

Opportunity exists in legislating equal inclusion of Indigenous content in Acts that outline similar requirements for French and English content, as a means to compel more Indigenous broadcasting. For example, there could be license requirements that require producers to connect with Indigenous artists. Changes in legislation could ensure equitable data collection, including total expenditures on Indigenous content, enabling advocates to more effectively promote equity for Indigenous content.

Additionally, Advisory Group members noted that the capacity of a filmmaker to access budgets required to produce large projects is a function of their experience in producing projects of similar size in the past. Given the systemic under-representation of Indigenous people in film, the funding structure creates a negative loop, whereby lack of funding limits Indigenous filmmakers in producing large projects, which then further limits access to funding. Finally, the Advisory identified tax incentives as an opportunity for Indigenous artists both for the film industry and other media groups. In particular, the establishment of appropriate tax breaks for productions on and off-territory.

[13] **Note:** This includes data on budgets for Indigenous content from national broadcasters, or, would involve developing a definition of Indigenous films, and seeking production costs and expenditures data from all productions in a given year.

Summary

Considerations:

- The production processes, inputs, and distribution channels used by artists differ substantially by media group.
- In general, visual artists highlighted that a lack of consumer awareness of Indigenous art makes visual arts and crafts more susceptible to underpricing, as well as to inauthentic reproduction.
- Performance artists equally stressed the importance of a consumer culture that understands and values Indigenous work, in addition to a need for Indigenous collaborative spaces.
- Advisory Group members highlighted that legislative protections on the intellectual property of artists vary by media type, and were not designed with considerations of Indigenous art, governance, or culture in mind. Indigenous film in particular does not get equal treatment in arts and culture related legislation.

Opportunities:

1. Develop awareness campaigns, in collaboration with Indigenous artists, to:
    a. strengthen national awareness and value of authentic Indigenous art, including awareness of authentication mechanisms, and
    b. strengthen international awareness and value of authentic Indigenous art, through trade missions abroad, or by promoting authentic art to tourists and foreign buyers.
2. Develop regulation with teeth to de-incentivize the sale of inauthentic art in Canada, including by online retailers;
3. Promote retailers and wholesalers to take action and responsibility over selling only authentic art;
4. Compile and distribute critical information for artists, including information pertaining to legislation, contracts, and the advantages of sale models, including royalty models, among others;
5. Develop or increase funding to support mentorship opportunities for artists;
6. Ensure the equal treatment of Indigenous culture in legislation; and
7. Enhance benefits through tax incentives, for instance, reducing taxation on traditional arts and cultural products, or ensuring appropriate tax breaks are in place for productions on and off-territory.

4.3 Trends in the Characteristics of Indigenous Artists Over Time

Because no previous studies share the scope of this project, we are unable to estimate changes in the composition, characteristics, and economic impacts of Indigenous artists over time, apart from Inuit art. To get a sense of what these changes in economic impacts might be, we examine data from the 2012 and 2017 Aboriginal Peoples Survey (APS) collected from Inuit and Métis and First Nations who are not living on reservations producing art for either income or consumption. Using data from the APS, we explore changes in the age and mean total income of Indigenous artists (excluding First Nations living on reservations between 2011 and 2016.

[14] **Note:** The 2012 and 2017 Aboriginal Peoples Survey is not enumerated on reservations.

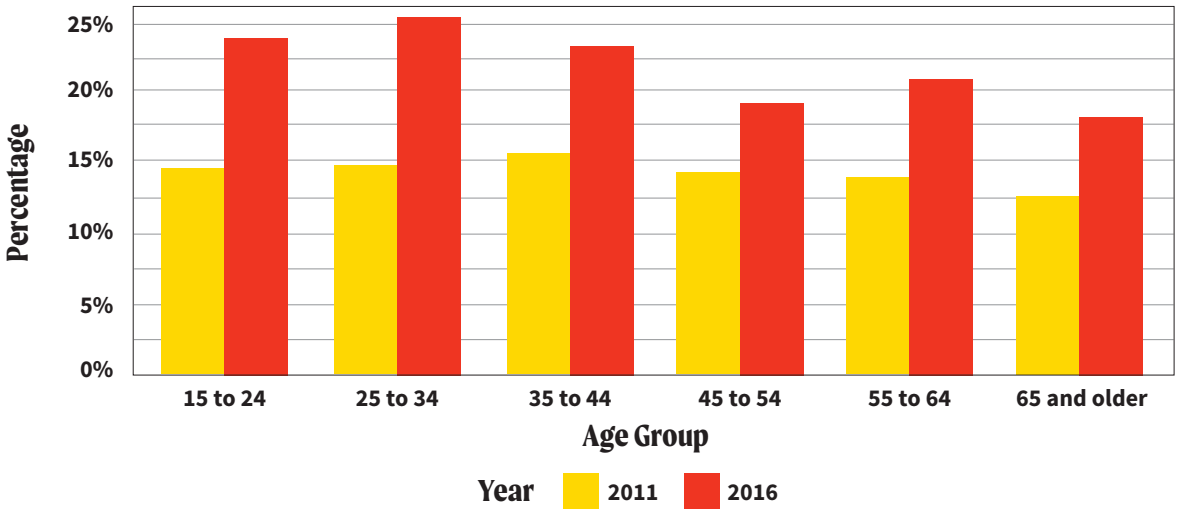
4.3.1 Age Distribution of Indigenous Artists Over Time

In 2016, the median age of Indigenous artists producing art for consumption is 38 and for income is 41. Artists tend to be slightly younger than the rest of the Indigenous population whose median age is 41.

Figure 4.3.1a presents the percentage of individuals producing art for consumption (as a percentage of the total population in each age group) in 2011 and 2016. Across all age groups, there is a higher percentage of individuals producing art for consumption in 2016 than there were in 2011. The largest increases in the proportion of individuals producing art for consumption occurred among the three youngest age groups (increasing between 8.4 percentage points and 10.5 percentage points from 2011 to 2016). The smallest increase took place in the 45 to 54 age group, at 4.6 percentage points.

Overall, in 2016 there is strong participation in the production of art for consumption across all age groups, but Indigenous people ages 15 to 44 are displaying the most engagement, relative to those who are 45 and older. Indigenous artists producing art for consumption were on average slightly younger with a median age of 38 in 2016 relative to 39 in 2011.

Figure 4.3.1a: Percentage of Individuals Within Each Age Group Producing Art for Consumption, Indigenous Artists in Canada, excluding First Nations living on reservations, 2011 & 2016.

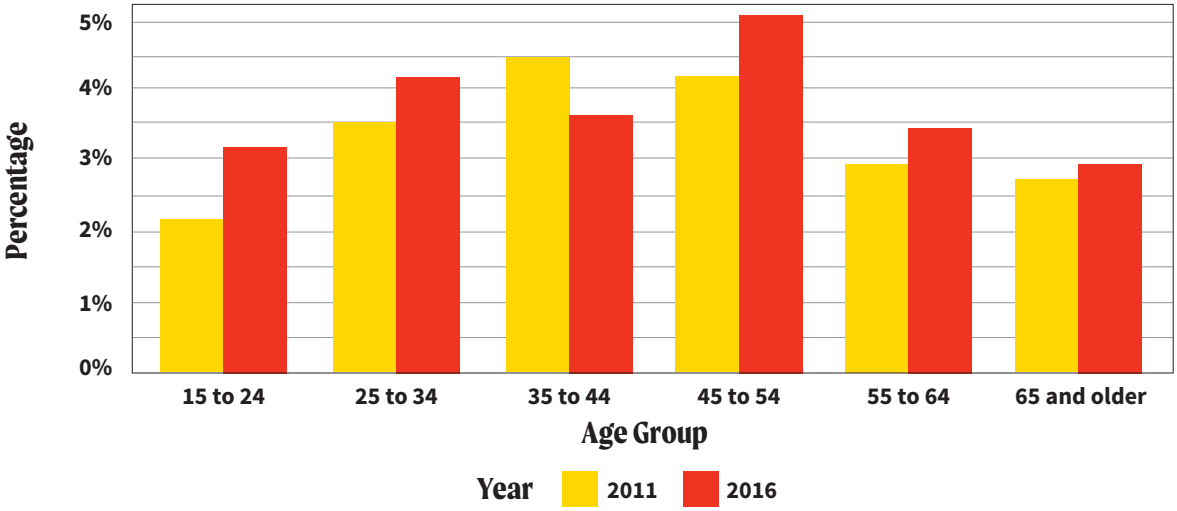


Source: 2012 Aboriginal Peoples Survey, 2017 Aboriginal Peoples Survey, Author's Own Calculations

A smaller proportion of individuals produce art for income relative to consumption. Figure 4.3.1b shows the proportion of individuals producing art for income, as a percentage of the total population in each age group, in 2011 and 2016. There were increases in the share of individuals producing art for income from 2011 to 2016 across age groups, except for 35 to 44 year olds, who saw a decrease in numbers. The largest increases were in the 15 to 24 age group and the 45 to 54 age group (both experienced an increase of 0.9 percentage points).

Producing art for income is most common among 45 to 54 year olds (5.1%). The youngest (15 to 24) and oldest (65 and older) age groups had the lowest percentage of individuals producing art for income in 2016 at 2.9% and 3.1%, respectively. The median age of artists producing art for income in 2016 was 41, older than the median age of 37 in 2011.

Figure 4.3.1b: Percentage of Individuals Within Each Age Group Producing Art for Income, Indigenous Artists in Canada, excluding First Nations living on reservations, 2011 & 2016.



Source: 2012 Aboriginal Peoples Survey, 2017 Aboriginal Peoples Survey, Author's Own Calculations

This data offers some insights into how artists' experiences of the Indigenous arts economy differ by their age. For example, we note the dip in production of art for income between 2011 and 2016 by Indigenous artists ages 35 to 44. While it is difficult to attribute this decrease to any one factor, we highlight that Case Study participants of all genders described the challenges of balancing art production and raising a family. In part this was attributed to a shift in priorities, the amount of time required to raise children, or additional financial pressure. As a result, one participant stressed the importance of considering parents in the development of any art-based opportunities, including the need for children to be accepted in art spaces.

> **"Understanding that often Indigenous artists are also parents is important to note.There's no separation between motherhood and art. As an artist it's about first and foremost creating those safe spaces where childcare is accessible, where breastfeeding is accessible, where kid safe foods are accessible. Just these little things that a lot of people don't think about."** — *Tenille Campbell*

Source: Big River Analytics 2019 Case Study Interview

The increase in Indigenous youth producing art for consumption and for income from 2011 and 2016 suggests that more Indigenous youth are being driven to produce art and to engage with their creativity, their voice, and their cultural traditions. Case Study participants spoke to the importance of continuing to support opportunities that allow Indigenous youth to connect with elders or other cultural teachers. Discussions with Case Study participants also suggest that young artists face particular sets of challenges when trying to launch their careers. For example, young artists may be susceptible to being overlooked for grant funding in favour of more established artists that can guarantee a "return on investment".[15]

Summary

Considerations:

- Artists of all ages are engaged in the production of art.
- The significant increase in young artists in 2016 relative to 2011 suggests a larger share of programs or services should be directed towards young artists.
- Young Indigenous artists face a particular set of challenges relative to other artists. In particular, young artists are often expected to compete with more established artists for funding, severely impacting their ability to launch their career.

There is an opportunity to support young Indigenous artists by:

1. Developing mentorship or career matching programs for young Indigenous artists to gain access to critical information and skills to grow their artistic career, if desired;
2. Ensuring the accessibility of grant funding for early-stage career artists who may not yet have extensive portfolios;
3. Continuing to support Indigenous organizations and programs that connect youth with elders;
4. Financing spaces for collaboration and studio spaces for youth; and
5. Expanding commissions for public art installations, including murals, in public spaces and public buildings across cities in Canada.

The reduction in production of art for income between 2011 and 2016 by Indigenous artists ages 35 to 44 additionally suggests that there are opportunities to support artists by:

1. Exploring avenues for funding targeted at new parents working in the arts sector, and
2. Considering the barriers to childcare that may be prevalent in art spaces.

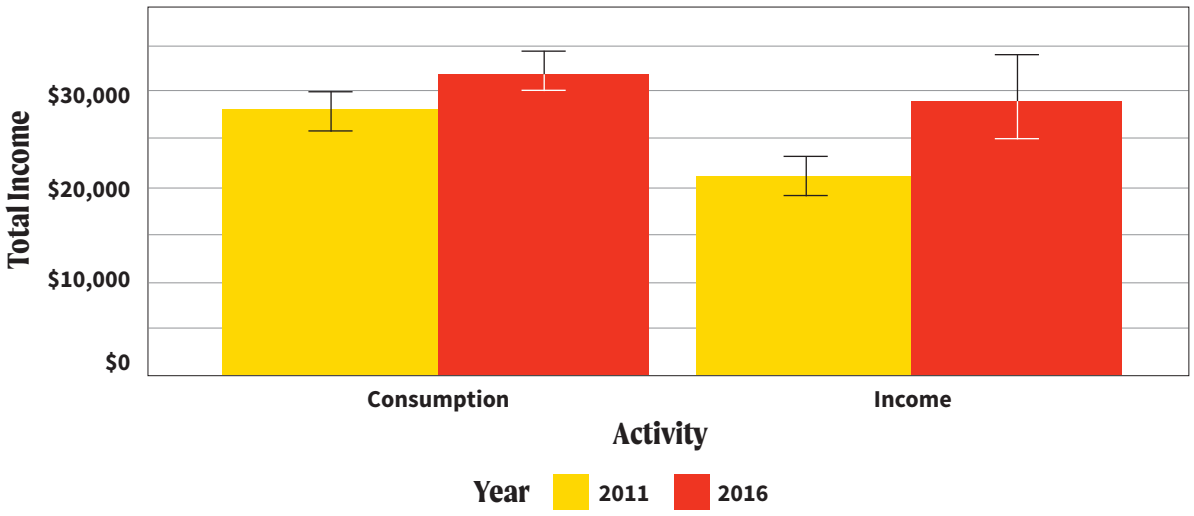
[15] **Note:** Unfortunately, when art is viewed as a business, then funders look for safe investments.

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

4.3.2 Income Distribution of Indigenous Artists Over Time

Although we are unable to estimate the change in the direct impacts of Indigenous art over time, we are able to observe differences in the total income of artists who produce art for income or consumption and who live off-reserve between 2011 and 2016. Total income, that is income from art and other sources, varies between artists who produce for consumption and income, and between age groups. Overall, Indigenous artists who produce for consumption off-reserve earn an average income of $32,000 and those who produce for income off-reserve earn an average income of $29,000 from all sources (see Figure 4.3.2a).

Figure 4.3.2a: Mean Total Income of Indigenous Artists, excluding First Nations living on reservations, by Activity, 2011 & 2016.

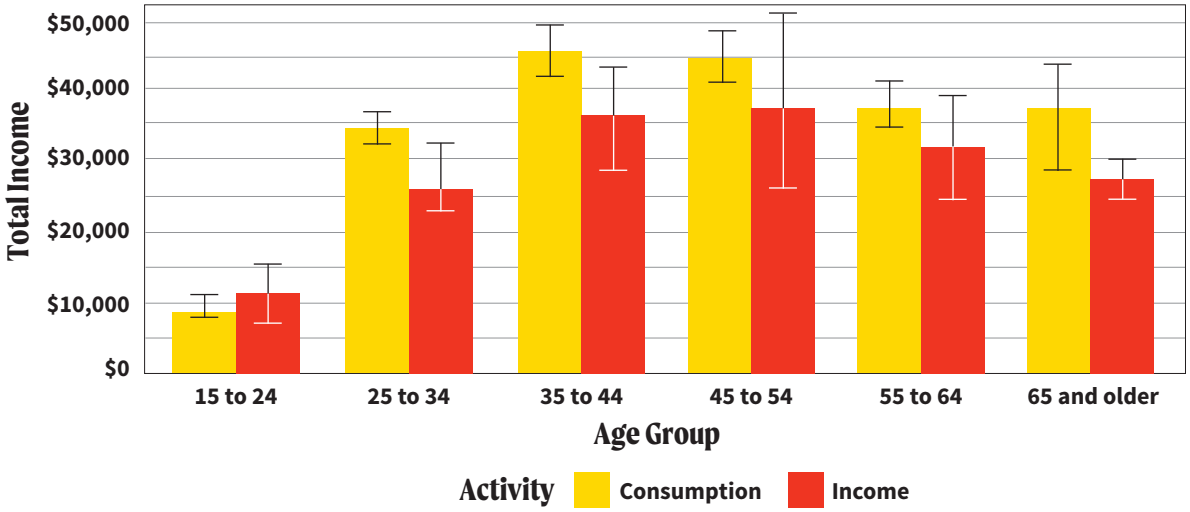


Source: 2012 Aboriginal Peoples Survey, 2017 Aboriginal Peoples Survey

Relative to 2011, both artist types are on average earning more total income, although artists producing art for income saw larger overall increases (+38.1%) to their income than those who are producing for consumption (+14.3%). This is relative to a 22.6% increase in income for Indigenous people not producing art at all, and an average increase in employment income for all Canadians over the same period of 10.2%. Although Indigenous artists' income has increased and increased at a faster rate than non-Indigenous Canadians, their income is still low relative to average incomes in Canada overall.

Indigenous artists' income also varies substantially depending on their age. Figure 4.3.2b shows the total income of artists who produce art for income and consumption by age group.

Figure 4.3.2b: Mean Total Income of Indigenous Artists, excluding First Nations living on reservations, by Activity and Age Group, 2016.



Source: 2012 Aboriginal Peoples Survey, 2017 Aboriginal Peoples Survey

Indigenous artists producing for consumption aged 35 to 44 ($46,000) and 45 to 54 ($45,000) have the highest average income of all artists, corresponding with peak working years for most individuals in the labour market. Indigenous artists producing for consumption make more income across all age categories with the exception of young artists (age 15 to 24).

Case Advisory group members shared the importance of funding for artists to be able to expand their production or take the next step in their career as an artist including to cover some of the upfront costs of starting an art business, or to support marketing spends. Looking to funding specifically, Advisory Group members and Case Study participants shared insights into the role that grant funding plays for some Indigenous artists' capacity to earn income. Overall, Case Study participants expressed varying levels of engagement with art organizations and funding programs. While some participants rely exclusively on grants to support their ability to create, many have never accessed funding having submitted one or more applications throughout their career. Similarly, in their 2019 study on Indigenous music, the APTN found that more than five in ten (55%) artists have never received funding for some aspect of their music career (APTN, 2019).

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

In general, Case Study participants described granting applications as a long, uncertain, and strenuous process. On a systems-level, participants consistently noted that granting systems are colonial structures that were not designed with Indigenous artists in mind. Grant applications are often experienced as an endless maze filled with twists, turns, and dead ends. In particular, writing standards and the requirement to submit applications in either French or English[16] were raised as a primary barrier to accessing funding.

> **"Art is business, no matter how much you want to separate the two. You want to get paid for your work, and you should get paid for your work..."** *— Tenille Campbell*
>
> **Source:** Big River Analytics 2019 Case Study Interview

Given the nature of grant applications, many artists consider them too risky of a time investment, especially given their lived experience of low success rates in the past despite the potential funding could hold for them to scale or develop their art business. An overhaul of the granting system in Canada is deemed pertinent, particularly as it relates to grant application design, application requirements, and spending restrictions.

Case Study participants and Advisory Group members shared that many artists face barriers in trying to access existing programming or funding geared at Indigenous artists. Be it complicated web interfaces, biography and picture requirements, or lengthy forms, accessibility needs to stay top of mind when developing new and existing programs and funding opportunities. Although costly, many felt that organizations should invest in individuals being available to connect with and help artists navigate business development or to support in-person and telephone grant applications.

[16] **Note:** Those Case Study participants who experienced the most success with grants were quick to name university education as an explanation.

"Writing strength shouldn't hinder someone's ability to access funds to create art. If you're visual artist and you have a hard time putting into words why your project is important, and how the funding will be allocated, or whatever business plan and thinking goes into it, if you're still making great art and you have folks who help you distribute it, you should be able to connect to funding." *— iskwē (waseskwan iskwew)*

Source: Big River Analytics 2019 Case Study Interview

Finally, we heard from Advisory Group members the role that a national artist's resale right could play in increasing the income and share of profits earned by Indigenous artists and their communities. This sentiment was echoed by the 2019 review of the Copyright Act by the Standing Committee on Industry, Science and Technology (Standing Committee on Industry, Science and Technology, 2019, p.5), and has long been advocated by Canadian Artists Representation - Le Front des Artistes Canadiens (CARFAC). According to CARFAC, at least 93 other countries imbue Artists Resale Rights to visual artists, enabling them to continue to benefit as the full value of their artwork grows alongside their reputation. Indigenous artists are estimated to lose out on a large share of profits from secondary markets, as many artists live in isolated northern communities and rely on retailers and wholesalers to connect them with buyers (CARFAC, n.d.).

Summary

Considerations:

• Indigenous artists' income has increased and increased at a faster rate than non-Indigenous Canadians, but their income is still low relative to average incomes in Canada overall.

Opportunities:

1. Increase access to resources, like funding, low cost studio spaces, or spaces for collaboration. In particular:
    a. Addressing systemic barriers to funding, decolonize the funding process, or creating new Indigenous-run organizations to distribute funds;
    b. Developing grant opportunities with fewer stipulations;
        i. Creating grants for business development
        ii. Creating grant opportunities accessible to artists in their early-stage career
    c. Increasing or maintaining consistent levels of funding; and
    d. Developing or increasing funding to support mentorship opportunities for artists.
2. Establish a national resale right as per Standing Committee on Industry, Science and Technology recommendations

5. Summary of Opportunities to Enhance the Economic Impact of Indigenous Art

Our second research aim was to identify opportunities to enhance the economic impact of Indigenous art in Canada. We identified opportunities through engagement with the Advisory Group, discussions with Case Study participants, a review of existing literature, and analyzing primary and secondary data sources. Each one of the opportunities presented is drawn from those conversations. While most are discussed throughout the report (including in Appendix A1, on the Costs of and Potential Responses to the Inauthentic Arts Economy), some additional opportunities are included in Tables 8.1 to 8.3 that were shared throughout the course of our research. We present a summary of these opportunities under three broad categories:

1. Unlocking benefits for Indigenous artists;
2. Increasing public awareness of Indigenous art and fostering positive consumer culture; and
3. Addressing systemic barriers that continue to hinder Indigenous artists.

We stress that the pursuit of any of the listed opportunities requires not only the active involvement and creative agency of Indigenous artists and Indigenous art organizations, but their leadership and direction. We anticipate that, as a whole, the Federal Government of Canada would be a key stakeholder and actor, but others may likewise lead or contribute to the uptake of these actions. Finally, actions should consider the importance of Indigenous art beyond its economic value, namely the social, intrinsic, and cultural values of art.

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

5.1 Unlocking Benefits for Indigenous artists

Table 5.1: Summary Table of Opportunities to Enhance the Indigenous Arts Economy

Opportunity
• **Compile and distribute critical information for artists, including information pertaining to legislation, contracts, and the advantages of sale models, including royalty models, among others.**

• **Increase access to resources, like funding, low cost studio spaces, or spaces for collaboration. In particular:**
  • Address systemic barriers to funding, decolonize the funding process, or create new Indigenous-run organizations to distribute funds;
  • *Invest in telephone and in-person support for grant applications,*
  • *Ensure accessibility of grant funding for early-stage career artists and youth,*
  • Increase or maintain consistent levels of funding;
  • Develop grant opportunities with fewer stipulations; and
  • Finance physical, Indigenous spaces and infrastructure for artists to create and collaborate, including investments in connectivity in rural and remote communities.

• **Diversify funding opportunities to include:**
  • Business development mentorship programs, including digital marketing, website development, accounting, distribution, sale and reproduction models and rights, contracts, and other entrepreneurial best practices;
  • Funding targeted at new parents working in the arts sector; and
  • Artistic mentorship and apprenticeship opportunities, including career matching programs.

• **Expand support to young Indigenous artists by:**
  • Developing mentorship or career matching programs for young Indigenous artists to gain access to critical information and skills to grow their artistic career, if desired;
  • Ensuring the accessibility of grant funding for early-stage career artists who may not yet have extensive portfolios;
  • Continuing to support Indigenous organizations and programs that connect youth with elders;
  • Financing spaces for collaboration and studio spaces for youth; and
  • Expanding commissions for public art installations, including murals, in public spaces and public buildings across cities in Canada.

Source: Big River Analytics

5.2 Public Awareness & Consumer Culture

Table 5.2: Summary Table of Opportunities to Enhance the Indigenous Arts Economy

Opportunity

• **Advocate for or work with Facebook, Instagram, and Etsy among other organizations to:**
  ◦ take decisive action in response to the sale of inauthentic art on their platforms,
  ◦ revise their policies pertaining to the sale of traditional, authentic art products, including sealskin products.

• **Further investigate best practices from successful authentication and certification initiatives, including:**
  ◦ the applicability, success, or drawbacks of tiered authentication mechanisms,
  ◦ for-profit models of centralized authentication.

• **Develop national awareness campaigns, in collaboration with Indigenous artists, to:**
  ◦ strengthen national awareness and value of authentic Indigenous art, including awareness of authentication mechanisms,
  ◦ strengthen international awareness and value of authentic Indigenous art, through trade missions abroad, or by promoting authentic art to tourists and foreign buyers,
  ◦ promote the sale and purchase of authentic products that use traditionally harvested materials both nationally and internationally.

• **Promote retailers and wholesalers to take action and responsibility over selling only authentic art, and encourage them to be leaders on their corporate social responsibility**

Source: Big River Analytics

5.3 Addressing Systemic Barriers

Table 5.3: Summary Table of Opportunities to Enhance the Indigenous Arts Economy

Opportunity

• **Ensure the equal treatment of Indigenous culture in legislation. For example, by:**
  • reviewing data collection, budget allocations, or licensing and broadcasting requirements that afford rights to English and Francophone culture but not to Indigenous culture by the same measure; and
  • committing to the equitable treatment of Indigenous artists in the legal underpinnings of Intellectual Property protections, by enforcing existing regulations and enacting harsher restrictions and penalties on the production or import of inauthentic Indigenous art. This could include border and trade restrictions on inauthentic goods.

• **Establish a national resale right as per Standing Committee on Industry, Science and Technology recommendations.**

• **Create new or modifying existing tax codes to resolve tax disincentives and creating new tax incentives to support authentic Indigenous art, including:**
  • reducing taxation on traditional arts and cultural products; and
  • ensuring tax breaks are in place for film productions both on and off-territory, as appropriate.

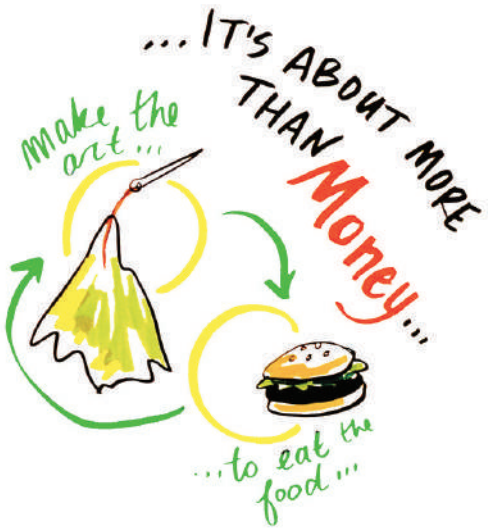
• **Enable the sale of art made from seal fur and other harvested materials to reach international markets.**
• **Create more opportunities for Indigenous peoples to be supported in leadership roles in government, arts organizations, and other decision-making bodies.**
• **Engage in a cost-benefit analysis of trade regulations and enforcement to limit the import of inauthentic manufactured goods**
• **Develop regulation with teeth to de-incentivize the sale of inauthentic art in Canada, including by online retailers.**

Source: Big River Analytics

6. Concluding Thoughts

We have estimated the total economic impact of Indigenous art and identified a number of opportunities to support the growth of the Indigenous arts economy.

Many artists we spoke to view their artistic production as a part of practicing their culture, as a way to heal, as an assertion of their identity, as a tool for advocacy, change, and education, as a core to their spirituality or traditional teachings, as a means to connect with their family, or simply as an activity that gave them great pleasure. For many, the hours spent in ceremony, with family, or in their community listening to teachings, practicing culture, and learning a craft is a foundational input to their artistic practice. Given the diverse motivations of artists for both producing and selling art, and the inherent cultural, spirit, and intrinsic value of artistic practice, the opportunities identified to increase the economic benefits of Indigenous art should consider the diversity of artists and broader social, cultural, benefits that stem from making art.



Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

On an international level, there is a perception that the federal government acknowledges "Indigenous arts and culture are the most unique and authentic thing Canada has to offer the world" (Noisecat, 2019). Canada often presents itself Internationally in this way, for instance, during the Vancouver Olympic games. While this international promotion can create potentially significant market opportunities for Indigenous artists, it is important to back these efforts with meaningful change and action domestically, or else they may result to be a mere continuation of tokenism identified by Case Study participants. Indigenous artists are doing the work of increasing visibility and building public awareness themselves every day. Many Case Study participants described a sense of responsibility to share their art as a way to promote the beauty and strength of their culture, and to (re)educate the non-Indigenous public.

But there is also a role for governments and other organizations to help foster a new and more informed consumer culture. A number of actions and recommendations from other sources have echoed the need to foster a culture that acknowledges, upholds, and values Indigenous peoples and culture, including the Truth and Reconciliation Commission final report and Calls to Action, the National Inquiry into Missing and Murdered Indigenous Women and Girls, and directly from Indigenous artists and advocates.

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

It is challenging, and likely not appropriate, to disentangle the conversations we had with Case Study participants and Advisory Group members about the arts economy from the broader historic and contemporary context of Indigenous peoples. Case Study participants expressed frustration at federal and provincial governments and grounded their recommendations and insights in experiences of having been dislocated from their territory and culture, and the difficulties of practicing traditional art when access to the land or the land itself has been severely disrupted. Many participants spoke to the barriers that limit access to traditional inputs. While a number of participants explained that their art practice was passed down by their family, surrounded and supported by their community and their territory, some participants were raised removed from their traditional territories, and removed from sources of traditional knowledge. This has had severe impacts on those participants' capacity to access their cultural heritage, access traditional materials, and to produce art.

The historic and contemporary social, economic, and political frustrations and grievances that artists shared with us are important to acknowledge, but responsive actions to address those frustrations and systemic barriers requires a much broader lens than an assessment of the economic impacts of Indigenous art.

"I think one of the barriers for me was the societal views of what is Indigenous storytelling. I was always trying to blend the old and the new, and so I didn't fit the mold. People wanted the fairytale, and I didn't want to compromise my storytelling to fit whatever mold they tried to put me into. Most of what I like to do still doesn't fit what is considered 'Indigenous art'. " *— Brandon Mitchell*

Source: Big River Analytics 2019 Case Study Interview

Overall, the economic impacts of Indigenous art in Canada are large, and Indigenous art provides an important source of income for Indigenous peoples and communities. The Indigenous arts economy has the potential to develop into a larger component of the Canadian economy and improve the economic wellbeing of Indigenous peoples. Importantly, in addition to these economic benefits, Indigenous art has broader desirable social impacts, including the power to heal, to rebuild communities, and re-educate Canadians. Advisory Group members shared their enthusiasm about the growth and interest in Indigenous artists nationally and internationally, and the momentum behind Indigenous arts and culture. Enhancing the economic impacts of Indigenous art can not only directly benefit Indigenous peoples but can serve to re-envision the Canadian economy through the promotion and resurgence of Indigenous cultures.

"Success for me is being able to do what makes me happy. Success is having the power to honour yourself if you're in a situation you don't want to be in anymore. Success is honouring your spirit and where you're at, even if that means making less money. Success means realizing that you're worth so much more. Success is the footprints that we are leaving and the marks we are making on the world and in our communities." *— Chief Lady Bird*

Source: Big River Analytics 2019 Case Study Interview

Appendices

A1. The Costs of and Potential Responses to the Inauthentic Arts Economy

The sale of inauthentic arts — which is art that mimics Indigenous art but not produced by Indigenous artists, and art that claims to be produced by Indigenous artists but is not — is of primary concern to most everyone who plays a role in the Indigenous arts economy. For this reason, we provide a dedicated discussion to the inauthentic arts economy.

The inauthentic arts economy is responding to consumer demand for Indigenous art and culture, profiting from a generalized lack of public awareness and government legislation or enforcement, and capitalizing on the history of economic exclusion of Indigenous peoples. As such, actions geared at fostering a more informed culture that values Indigenous art, promoting authentic Indigenous art, strengthening authentication mechanisms, and more effectively responding to eliminate inauthentic art from the market have been identified as opportunities to enhance the Indigenous arts economy (see Section 5.0 for a summary of these recommendations).

The existence of the inauthentic arts economy serves as a signal for the demand for Indigenous art and designs. Inauthentic Indigenous art is assumed to capture huge shares[17] of the Indigenous arts market in Canada, thereby diverting economic benefits away from Indigenous artists. In particular, Case Study participants and Advisory Group members expressed concern over the use of Indigenous designs for mass produced goods for purchase by tourists (e.g., souvenirs), and for domestic consumption (e.g., dream catchers). A recent investigation by Discourse Media found 75% of Vancouver souvenir shops[18] sell some form of inauthentic or appropriated Indigenous art (Fiona, 2019).

Although eliminating inauthentic Indigenous art is an opportunity to enhance economic benefits for Indigenous artists, it is important to note that the impacts of appropriation extend far beyond economic losses. Indigenous art is intimately linked to culture, governance, stories, law, and also exists as an avenue for healing, for the re-education of non-Indigenous Canadians, for the resurgence of Indigenous culture, and for the decolonization of Canadian culture. Case Study participants shared stories of how the appropriation of art has come at a high and personal cost to themselves, their families, and their communities. As such art's misappropriation only serves to subvert the integrity of all of these facets of culture and resurgence and is borne collectively by Indigenous peoples and communities.

[17] **Note:** Though equivalent figures do not exist for Canada, in Australia it is estimated that 80% of souvenirs sold purporting to represent Indigenous cultures are in fact imitation products (Commonwealth of Australia, 2018).
[18] **Note:** Discourse visited a sample of 40 shops in Vancouver.

The impacts and experiences of appropriation differ according to artistic media and industry and, as such, there is no one-size-fits-all solution to addressing the issue. Interviewees expressed how instances of appropriation are experienced more overtly by artists specializing in visual arts and handmade crafts (i.e. traditional sewers, bead workers, or carvers) in comparison to performance arts, film, media, writing, and publishing, where appropriation takes a different form and thus requires different responses. In particular, performance artists, writers, and musicians shared that the idiosyncratic or ephemeral nature of their work made it difficult to appropriate.

There are a range of mechanisms, from social norms to law, that can serve to promote and protect the intellectual property of Indigenous artists from appropriation and misuse. Some media, for instance film, writing, and music, are protected by intellectual property and copyright legislation, in ways that visual arts and handmade crafts are not.[19] Even so, those legal structures were not designed with considerations of Indigenous art, governance, or culture in mind.

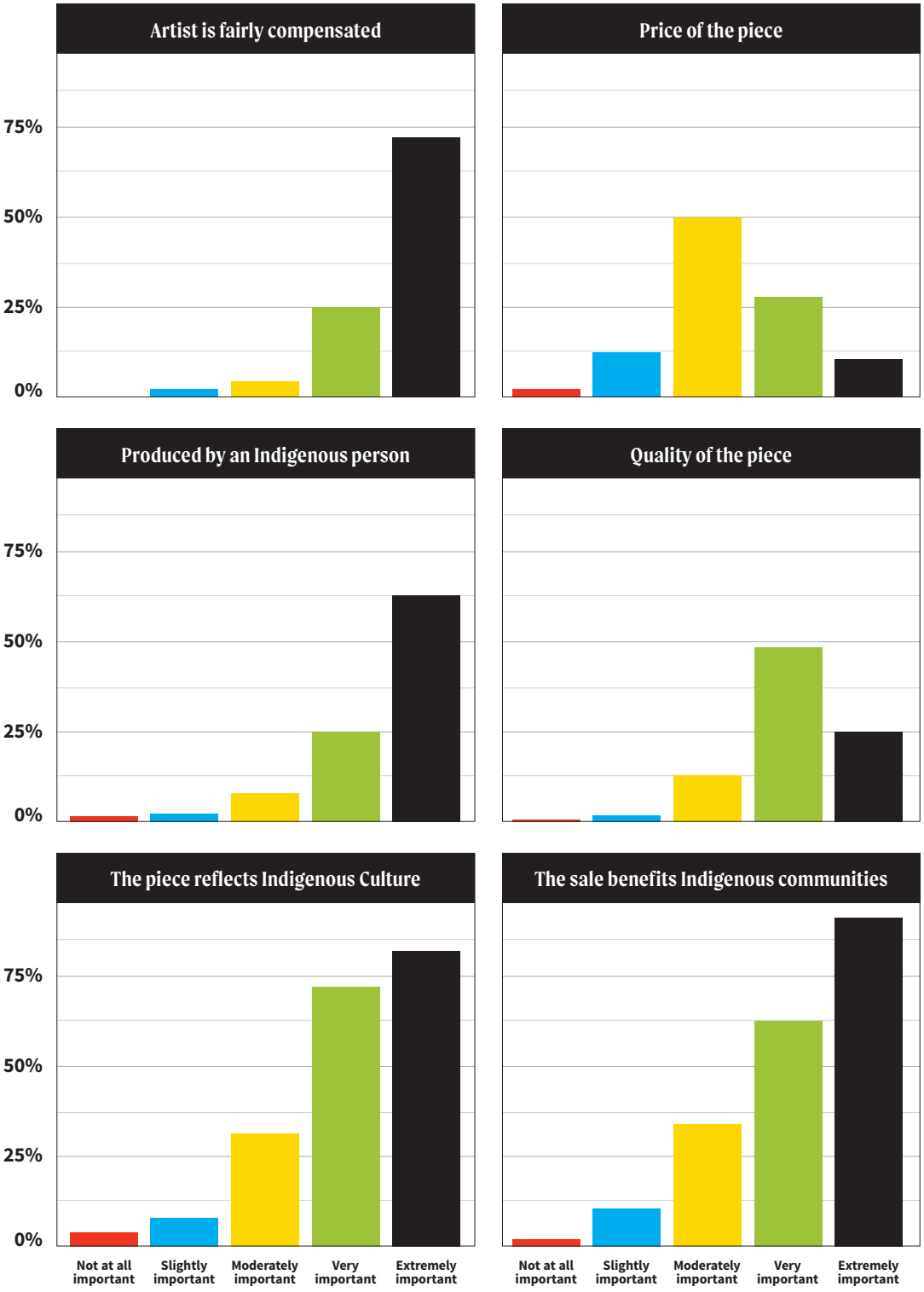
There is also a role for consumers and retailers to play in the sale and purchase of authentic Indigenous arts. Additionally, government and other organizations can support and encourage improved consumer behaviour through non-legal channels. There are a number of authentication mechanisms that exist, including programs like the Igloo Tag, Authentic Aboriginal, Authentically Indigenous, and Reclaim Indigenous Arts that serve to signal authentic art to consumers and retailers. Authentication can enable consumers to make more informed decisions and increase the consumers' awareness of and value for authentic Indigenous art. Additional funding can be provided to support existing authentication mechanisms, or to raise awareness and influence consumer behaviour by showcasing art and artists, speaking to the costs of inauthentic Indigenous art, or enabling more Indigenous-led arts organizations to have the capacity and resources to recommend appropriate approaches. All that being said, there is a difference between the sale or purchase of authentic art, and the ethical acquisition of ethical art, and the two should not be conflated. In effect, authentication does not necessarily mean that an artist has been fairly compensated.

The data from consumers themselves suggests a desire to make authentic purchases that benefit Indigenous artists. Figure A1 shows that consumers are eager to purchase art that is authentic, reflects Indigenous culture, compensates the artists fairly, and benefits Indigenous peoples. Over 85% of respondents find it either very or extremely important that the art they purchase is produced by an Indigenous artist. The majority of respondents also said that they would be willing to pay more for a piece they know was produced by an Indigenous artist. On average, our survey suggests that consumers are willing to pay $345 more to know a piece has been produced by an Indigenous artist. The average annual spend on Indigenous art by consumers surveyed was $538,[20] meaning that roughly 64% of the value to a consumer is in a piece's authenticity. Further, the criteria that consumers identified to be the most important when purchasing a piece of Indigenous art is whether the artist is fairly compensated.

[19] **Note:** Other jurisdictions take different approaches. For instances, "selling fraudulent Indigenous art is illegal in the US under the *Indian Arts and Crafts Act,* and is punishable by up to five years in jail and a $250,000 fine for an individual — or up to $1 million for a company. In Canada, no such law exists against misrepresenting inauthentic Indigenous-themed items as real" (Fionda, 2019).

[20] **Note:** The average total spent on Indigenous art is $828.35. After removing outlier values greater than $1M it's $538.

Figure A1: Consumer Responses to the Importance of Various Aspects when Purchasing a Piece of Indigenous Art.



Source: Big River Analytics 2019 Survey of Indigenous Artists, Consumers, Retailers, and Wholesalers

We had lengthy discussions with Case Study participants and Advisory Group members about authenticity, and consumers' behaviours and understanding of Indigenous art. A national culture that values Indigenous art can enable Indigenous artists to create and distribute their art in the ways that they choose. Many Case Study participants felt that the onus was currently on individual Indigenous artists to raise public awareness or convince non-Indigenous consumers of the value of their work.

A1.1 Authentication Mechanisms

Broadly, authentication can take three forms:

1. **Intellectual Property** (e.g.: trademarks, patents, and copyright);
2. **Community-enforced, decentralized authentication** (e.g.: awareness campaigns on social media); and
3. **Centralized authentication initiatives** (e.g.: Authentic Indigenous and Authentically Aboriginal).

We explore each in further detail.

Intellectual Property

Intellectual property and copyright legislation, including trademarks, patents, and copyright, are legal protections that can be used by some Indigenous artists, particularly those in film, media, writing, and publishing. Though an important protection for many, the focus of the existing law is on the rights of the individual, not of a community, which brings into question its effectiveness in protecting the works of Indigenous peoples (Ingham, 2017). In 2019, the Standing Committee on Industry, Science and Technology found that the Copyright Act "fails to meet the expectations of Indigenous peoples with respect to the protection, preservation, and dissemination of their cultural expressions" (2019). In effect, intellectual property law and its assumptions have been colonially imposed onto Indigenous artists and communities, and the question is whether mere alterations to this legal framework is really the best path forward for Indigenous artists and communities (Ingham, 2017; Advisory Group Meeting #3, 2019).

As an example, similar to other artists, Indigenous filmmakers, for instance, rely on stories and input from their culture and communities. This raises questions around ownership and the right to tell one's story. When it comes to bringing a story to the big screen, or to print, questions remain around: Who owns it? Is it owned by an individual artist who is working to tell their version, is it owned by the production company or editing house investing in the project, or is it owned by the community who first told it? (Fiona, 2019).

Existing legal frameworks do not appropriately address many of these questions or offer sufficient protection by artistic media-type. More dedicated research and engagement with artists and stakeholders would be required to make specific recommendations on appropriate legal changes.

We present the recommendations made in 2019 to the Government of Canada by the Standing Committee on Industry, Science and Technology, on Amendments to the Copyright Act for consideration (see Figure A1.1). These recommendations align with the feedback we heard on the need to strengthen and modify Intellectual Property mechanisms for the economic benefit of Indigenous artists.

Figure A1.1: Standing Committee on Industry, Science and Technology Recommendations on Amendments to the Copyright Act, 2019.

Recommendation 5:

That the Government of Canada consult with Indigenous groups, experts, and other stakeholders on the protection of traditional arts and cultural expressions in the context of Reconciliation, and that this consultation address the following matters, among others:

- The recognition and effective protection of traditional arts and cultural expressions in Canadian law, within and beyond copyright legislation;
- The participation of Indigenous groups in the development of national and international intellectual property law;
- The development of institutional, regulatory, and technological means to protect traditional arts and cultural expressions, including but not limited to:
    - Creating an Indigenous Art Registry;
    - Establishing an organization dedicated to protecting and advocating for the interests of Indigenous creators; and
    - Granting Indigenous peoples the authority to manage traditional arts and cultural expressions, notably through the insertion of a non-derogation clause in the *Copyright Act.*

Source: Standing Committee on Industry, Science and Technology, 2019

As discussed, we received feedback from artists, Advisory Group members, and Case Study participants that the current legal framework is insufficient at protecting the Intellectual Property of Indigenous artists. As such, we recommend a dedicated and more comprehensive review of legal mechanisms be conducted that takes broader aims into consideration than economic opportunities of Indigenous artists.

Community-Enforced Mechanisms

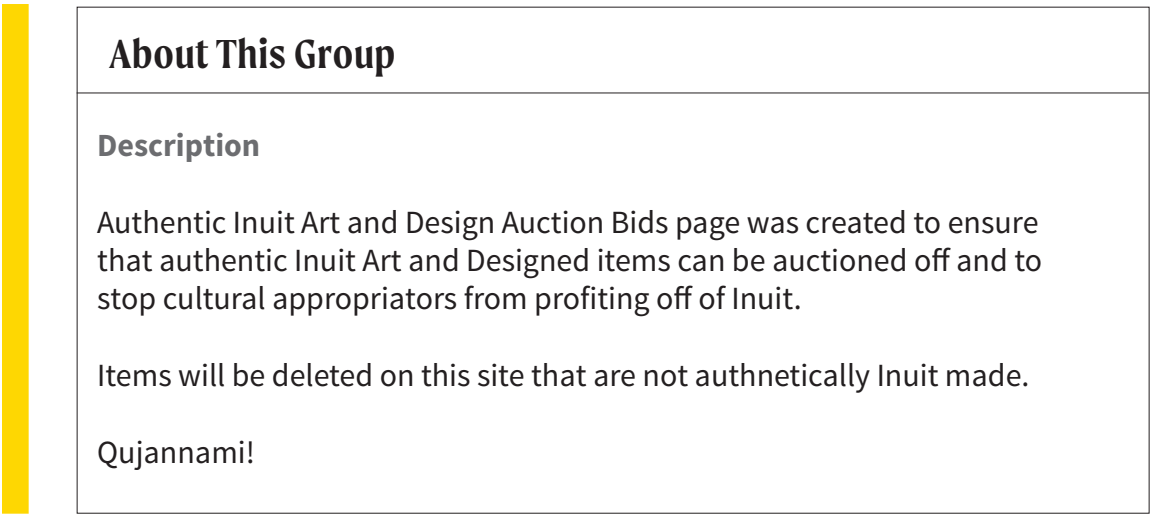
Case Study participants spoke to community-enforced, decentralized mechanisms for authentication, made possible in part by the integration of and collaboration between members of the Indigenous arts community.

"When you're an Indigenous person, you recognize your brothers and sisters within the community and you know who is authentic or not. Especially on social media and the amount of art being sold there, we always talk about how people are taking patterns, colours, using it and selling it making profit." *— Talitha Tolles*

Source: Big River Analytics 2019 Case Study Interview

Community-enforced, decentralized authentication was exemplified in December 2019 by a member of the Iqaluit Auction Bids Facebook group who, in response to inauthentic art being sold on the popular Facebook page and the perceived lack of accountability in the bidding group itself, created a new Facebook group on December 13, 2019 called "Authentic Inuit Art and Design Auction Bids". On March 23, 2020 the group had 3,151 members, and the page description is summarized in Figure A1.2.

Figure A1.2: Authentic Inuit Art and Design Auction Bids Facebook Group Description



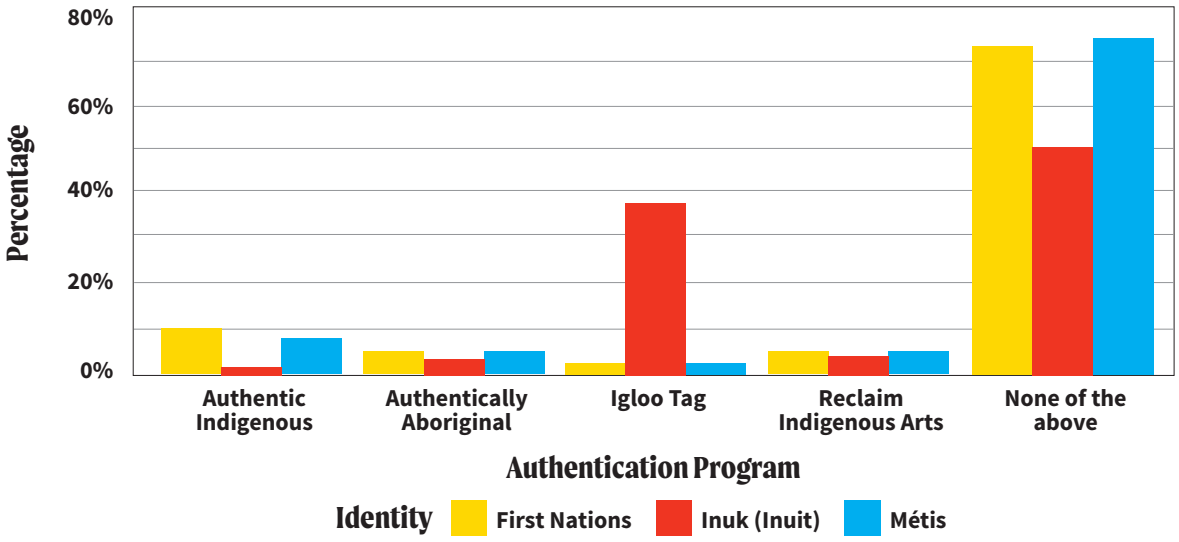
Source: Facebook - Authentic Inuit Art and Design Auction Bids, "About", 2020

Community-enforced, decentralized authentication mechanisms rest in the strength and health of the Indigenous arts community. A number of Case Study participants stated the importance of authentication mechanisms existing in the hands of communities themselves, alluding to damaging instances of government attempts to determine who is and is not Indigenous. As such, we recommend enhanced funding support for Indigenous-led organizations to increase capacity of community-led organizations and administer support and funding to grow the Indigenous arts sector, community, and number of individual artists.

Centralized Authentication

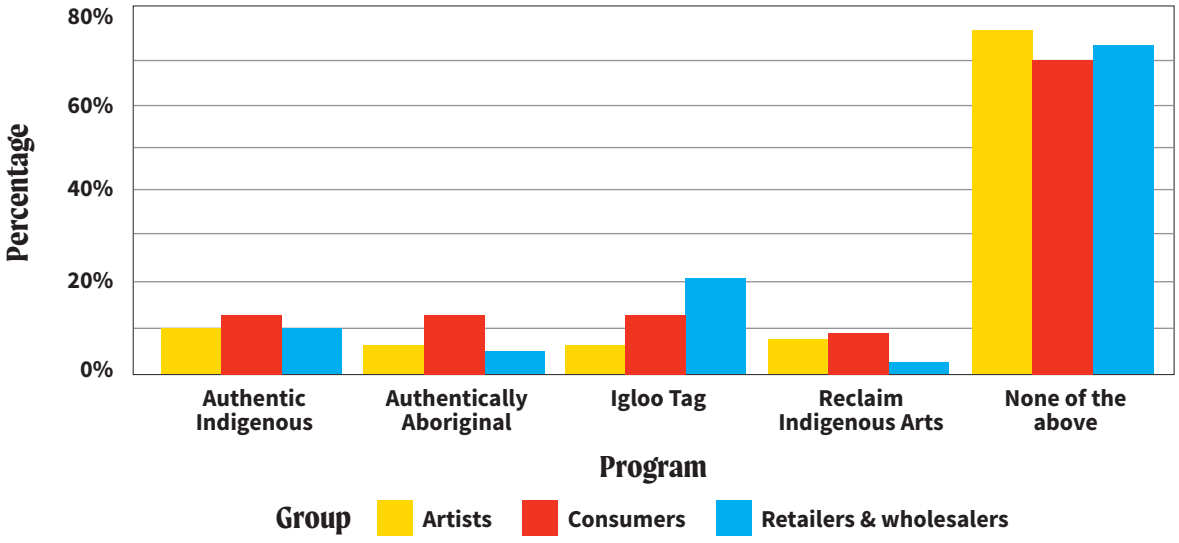
Lastly, we consider centralized authentication initiatives. Our primary data and Case Study findings highlight that the authentication programs studied, that is the Igloo Tag, Authentic Indigenous, Authentically Aboriginal, and Reclaim Indigenous Arts, are not well recognized across consumers, artists, and retailers and wholesalers. Figures A1.3 and A1.4 show the percentage of artists by identity group, and artists, consumers, and retailers and wholesalers who have heard of the authentication programs studied.

Figure A1.3: Percentage of Respondents Who Have Heard of Listed Authentication Programs, by Identity Group.



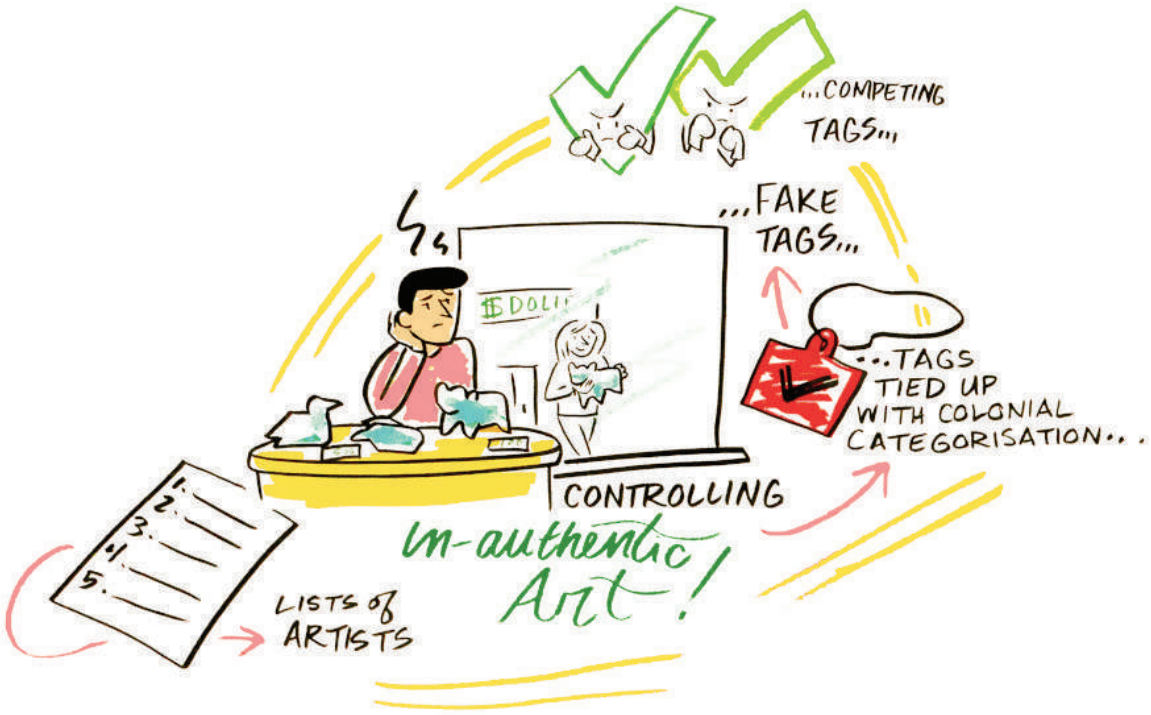
Source: Big River Analytics 2019 Survey of Indigenous Artists, Consumers, and Retailers and Wholesalers, Author's Own Calculations

Figure A1.4: Percentage of Indigenous Artists, Consumers of Indigenous Art, and Retailers & Wholesalers Who Have Heard of Authentication Programs.



Source: Big River Analytics 2019 Survey of Indigenous Artists, Consumers, and Retailers and Wholesalers, Author's Own Calculations

Of artists, consumers, and retailers, artists were the least likely to have heard of the authentication programs. A total of 77.6% of Indigenous artists have not heard of any of the authentication programs, followed by retailers and wholesalers (72.4%), and consumers (71.1%). Among Indigenous artists, Inuk artists were noticeably more likely to have heard of the Igloo Tag (35%) than other identity groups were of other programs.



Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

Furthermore, discussion among the Advisory Group made it clear that the development of national or regional authentication systems will require concerted efforts and investments if they are to be successful, and coordination may be required across different programs to ensure an effective and coherent system. All involved stressed, however, the importance that authentication mechanisms be government-funded, without being government-run. For programs to effectively counter inauthentic Indigenous art, program awareness and perceived program value and trust would have to increase significantly.

Keeping in mind that inauthentic art has both economic, social, and cultural costs, limiting its pervasiveness would enhance the economic impact of Indigenous art in Canada.

A1.2 Opportunities

In the proceeding section we suggest some avenues for other actors to promote the arts. Additionally, we discuss recommendations related to authentication. Given the size and very existence of the inauthentic arts economy in Canada, and the effectiveness of legal regimes that have banned the practice elsewhere, there is likely a role for the Federal Government to play. Importantly, Case Study participants and Advisory Group members also identified key roles they would not like the government to play in the authentication of Indigenous art, for instance, in defining what constitutes authenticity or Indigeneity. Given the current limitations of authentication mechanisms, we present the following opportunities to improve their effectiveness, as raised by Case Study participants and the Advisory Group:

1. Further investigate best practices from other successful authentication and certification initiatives, including:
    1.1. the applicability, success, or drawbacks of tiered authentication mechanisms, including “original design by an Indigenous artist”, “made by an Indigenous artist”, and “Indigenous owned”, that may allow Indigenous companies and organizations to scale production of art without compromising their authenticity,
    1.2. for-profit models of centralized authentication.

2. Develop national awareness campaigns, in collaboration with Indigenous artists, to:
    2.1. strengthen national awareness and value of authentic Indigenous art, and awareness of authentication mechanisms in Canada,
    2.2. strengthen international awareness and value of authentic Indigenous art, through trade missions abroad, or by promoting authentic art to tourists and foreign buyers.

3. Promote retailers and wholesalers to take action and responsibility over selling only authentic art and encourage them to be leaders on their corporate social responsibility.

4. Advocate for or work with Facebook, Instagram, and Etsy among other organizations to:
    4.1. take decisive action in response to the sale of inauthentic art on their platforms,
    4.2. revise their policies pertaining to the sale of traditional, authentic art products, including sealskin products.

5. Strengthen government resolve towards limiting the pervasiveness of inauthentic art by:
    5.1. Exploring trade regulations and enforcement to limit the import of inauthentic manufactured goods; and
    5.2. Organizing trade missions to promote authentic Indigenous art internationally.

6. Develop regulations with teeth to de-incentivize the sale of inauthentic art in Canada, including by online retailers such as Etsy.

7. Ensure the enforcement of existing regulations, and enact harsher restrictions and penalties on the production or import of inauthentic Indigenous art. This could include border and trade restrictions on inauthentic goods.

Defining Authenticity

The success of authentication, whatever form it takes, requires an appropriate definition of what ***is*** authentic Indigenous art. For the purpose of the economic impact assessment estimates, Indigenous art is all self-identified artistic output produced by an Indigenous person. Case Study interviews with artists and conversations with the Advisory Group further alluded to the following definitions:

D1: Regardless of the output, Indigenous art is authentic insofar as it was created by an Indigenous artist. In other words, a piece of work doesn't have to look "traditional" to the non-Indigenous gaze in order to be authentic. ***"My work is Indigenous because I am."*** — Lesley Hampton

D2: Indigenous art is authentic insofar as it was created by an Indigenous artist, following traditional processes. In other words, the way in which a work of art is created matters. ***"When I'm weaving, I'm taking history with me. When that's appropriated, it's just about the end result. The rootedness is what makes it authentic."*** — Leslie Brown

D3: Indigenous art is defined and held by a Nation (i.e: only the Haida can determine what Haida art is). This definition takes into consideration the community artists assign their identity and cultural practice to, and who they feel responsible to in undertaking that practice.

Case Study participants and the Advisory Group raised specific questions on the authentication of works of art such as films, or books. In effect, on projects that require large teams, how is authentication determined?

Additionally, all Indigenous artists, and Indigenous filmmakers and writers particularly, rely on stories and input from their culture and communities. This raises questions around ownership and the right to tell one's story, especially for those works protected by Intellectual Property law. When it comes to bringing a story to the big screen, or to print, the question is: Who owns it? Is it owned by an individual artist who is working to tell their version, is it owned by the production company or editing house investing in the project, or is it owned by the community who first told it? The problem with these questions is that the answers depend on who you ask.

"If you're going to tell a story from home, and you are going to knowledge keepers and language holders asking for their help, you have to pay them and you have to acknowledge them in writing and when you hit the stage. It only strengthens you as an Indigenous creator to acknowledge those who have helped you in whatever it is that you've crafted. With authenticity comes responsibility."
— Case Study Participant

To add a final layer of complexity, Indigenous identity has been subject to policies and laws aimed at cultural assimilation, dislocation, and weakening of family ties and cultural linkages (Truth and Reconciliation Commission, 2015). As such, when discussing definitions of Indigenous art, Case Study participants and Advisory Group members were vocal about the challenges of implementing specific definitions and adamant that control over these definitions be left in the hands of Indigenous people, rather than governments.

Source: Advisory Group Meeting #3 & Big River Analytics 2019 Case Study Interviews

A2. Economic Impact Assessment Tables by Indigenous Identity Group & Geography

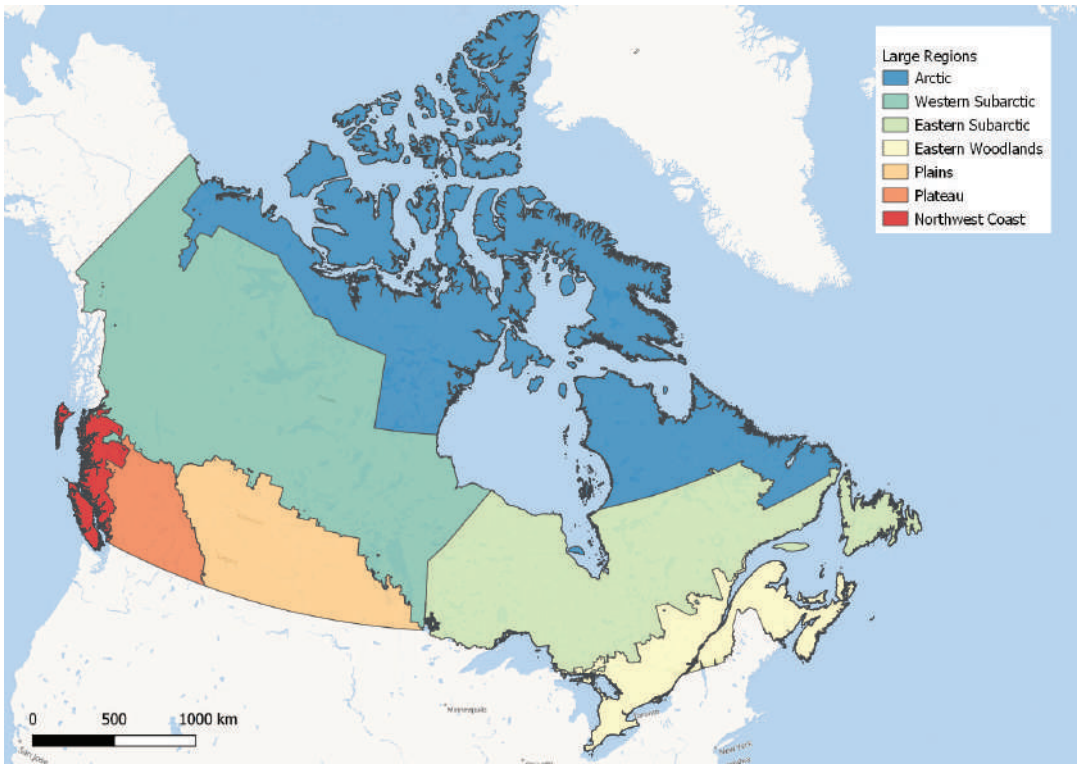
There is substantial variation across the Indigenous arts economy. As such, we have produced a number of additional tables and estimates for identity groups and geographies. In addition to considering findings for provincial and territorial jurisdictions, we built custom culturally relevant geographies to reflect regional groupings specific to Indigenous artistic traditions. We first discuss the methodology for defining culturally relevant geographies, and then present estimates of the number of artists and economic impacts for different areas and identity groups.

A2.1 Culturally Relevant Geographies

A review of literature enabled the identification of broad artistic groups within First Nations, Métis, and Inuit cultures. The styles and subsequent groupings are based on those in MacMillan et al. (2004), though it is understood that there is significant variation within each region in terms of artistic styles and Indigenous cultures.

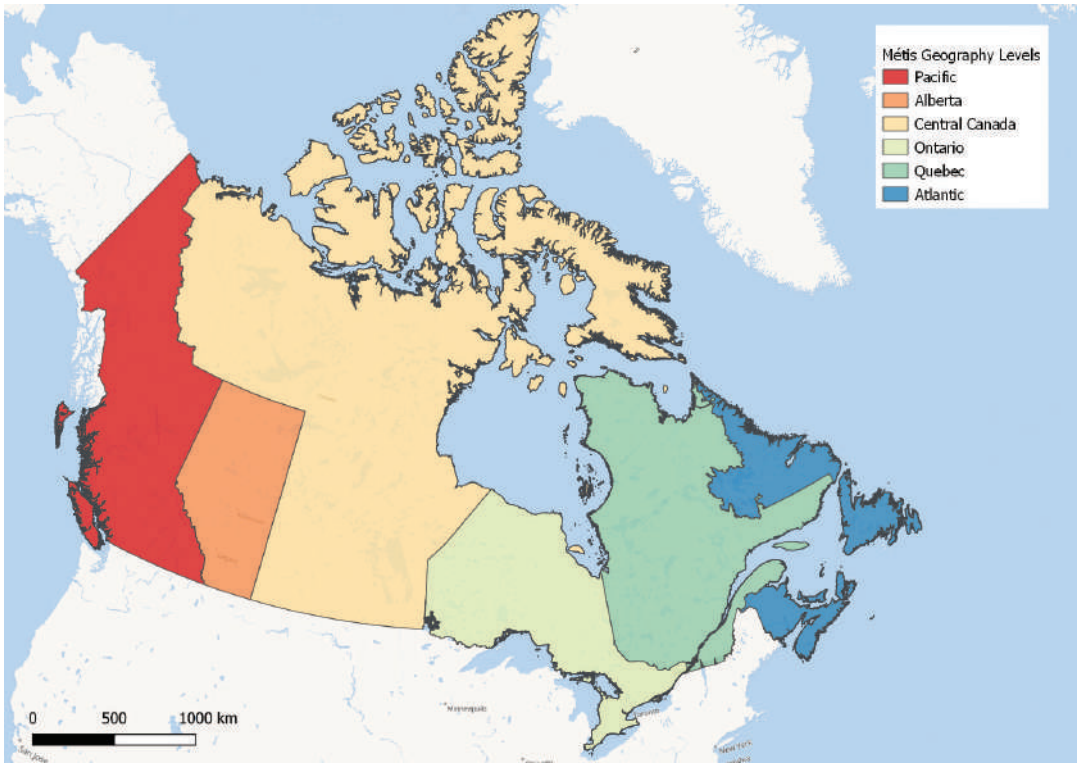
Census Subdivisions (CSD) were then classified into an artistic grouping based on the percentage of individuals from each Indigenous group living in the area. Classification of CSDs into artistic groups is key to integrating data from multiple sources required to construct estimates. Figures A2.1.1, A2.1.2, and A2.1.3 delineate the relevant geographies by identity group.

Figure A2.1.1: Culturally Relevant Geographies - First Nations.



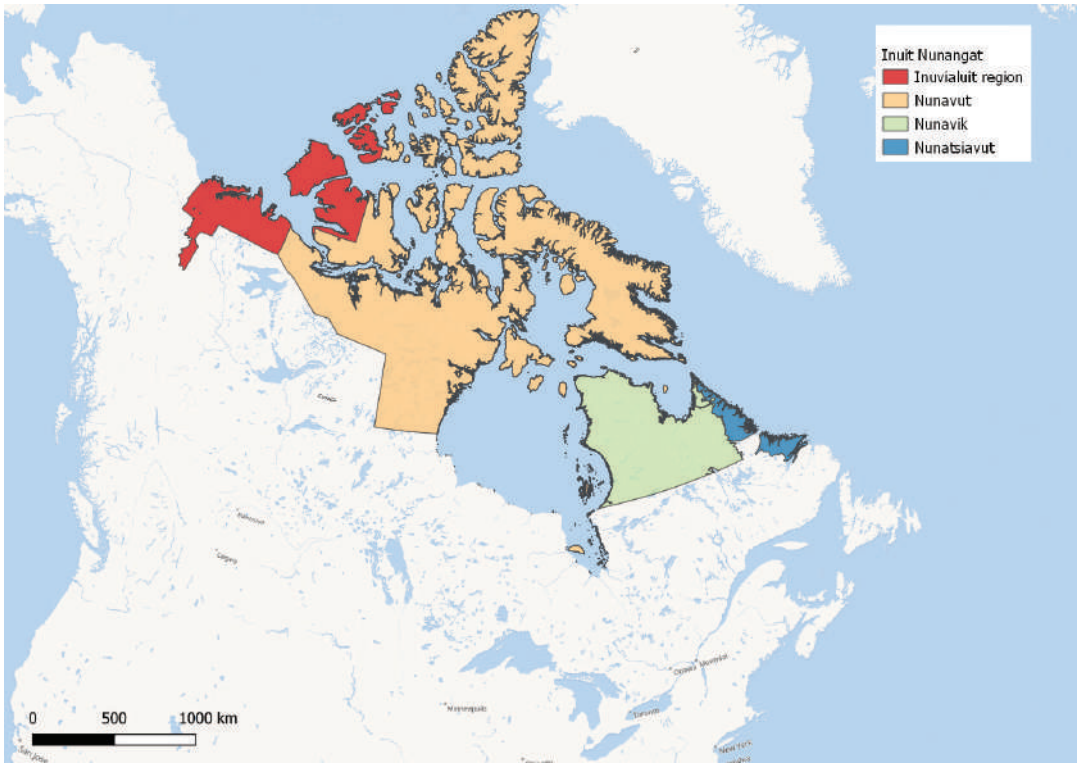
Source: Big River Analytics

Figure A2.1.2: Culturally Relevant Geographies - Métis.



Source: Big River Analytics

Figure A2.1.3: Culturally Relevant Geographies - Inuit.



Source: Big River Analytics

A2.2 Number of Artists by Identity Group & Geography

Table A2.2.1: Number of Indigenous Artists by Region and Activity, All Identity Groups, 2018.

Region	Income	Consumption
British Columbia	7,840	38,810
Alberta	5,550	36,530
Eastern Prairies	6,750	43,640
Ontario	10,990	62,200
Quebec	6,440	27,730
Atlantic	3,670	24,630
Territories	3,600	10,800
TOTAL	**44,840**	**244,340**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Table A2.2.2: Number of First Nations Artists by Region and Activity, 2018.

Region	Income	Consumption
Arctic	270	580
Western Subarctic	2,140	10,900
Eastern Subarctic	2,020	13,860
Eastern Woodlands	10,810	52,530
Plains	6,740	32,110
Plateau	2,300	10,670
Northwest Coast	2,370	10,110
TOTAL	**26,650**	**130,760**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Table A2.2.3: Number of Métis Artists by Region and Activity, 2018.

Region	Income	Consumption
Atlantic	1,190	8,200
Quebec	1,550	10,520
Ontario	3,370	24,970
Central Canada	1,850	20,500
Alberta	2,170	20,140
Pacific	3,190	17,080
TOTAL	**13,320**	**101,410**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Table A2.2.4: Number of Inuit Artists by Region and Activity, 2018.

Region	Income	Consumption
Nunatsiavut	220	370
Nunavik	1,360	3,130
Inuvialuit	230	660
Nunavut	2,650	7,170
Outside of Inuit Nunangat	780	3,380
TOTAL	**5,050**	**14,710**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

A2.3 Economic Impacts by Identity Group & Geography

Table A2.3.1: Economic Impacts, GDP, in Millions of Dollars, of Indigenous Art, by Region, First Nations Artists, 2018.

Region	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
Arctic	5	7	8
Western Subarctic	29	46	54
Eastern Subarctic	31	53	62
Eastern Woodlands	143	229	268
Plains	86	138	162
Plateau	35	53	62
Northwest Coast	35	53	62
TOTAL	**364**	**579**	**678**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Table A2.3.2: Economic Impacts, GDP, in Millions of Dollars, of Indigenous Art, by Region, Métis Artists, 2018.

Region	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
Atlantic	6	16	18
Quebec	13	26	30
Ontario	23	52	61
Central Canada	15	38	44
Alberta	13	35	40
Pacific	23	45	52
TOTAL	**93**	**211**	**247**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Table A2.3.3: Economic Impacts, GDP, in Millions of Dollars, of Indigenous Art, by Region, Inuit Artists, 2018.

Region	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
Nunatsiavut	2	4	4
Nunavik	8	21	25
Inuvialuit	1	4	5
Nunavut	15	44	51
Outside of Inuit Nunangat	4	16	19
TOTAL	**30**	**89**	**104**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

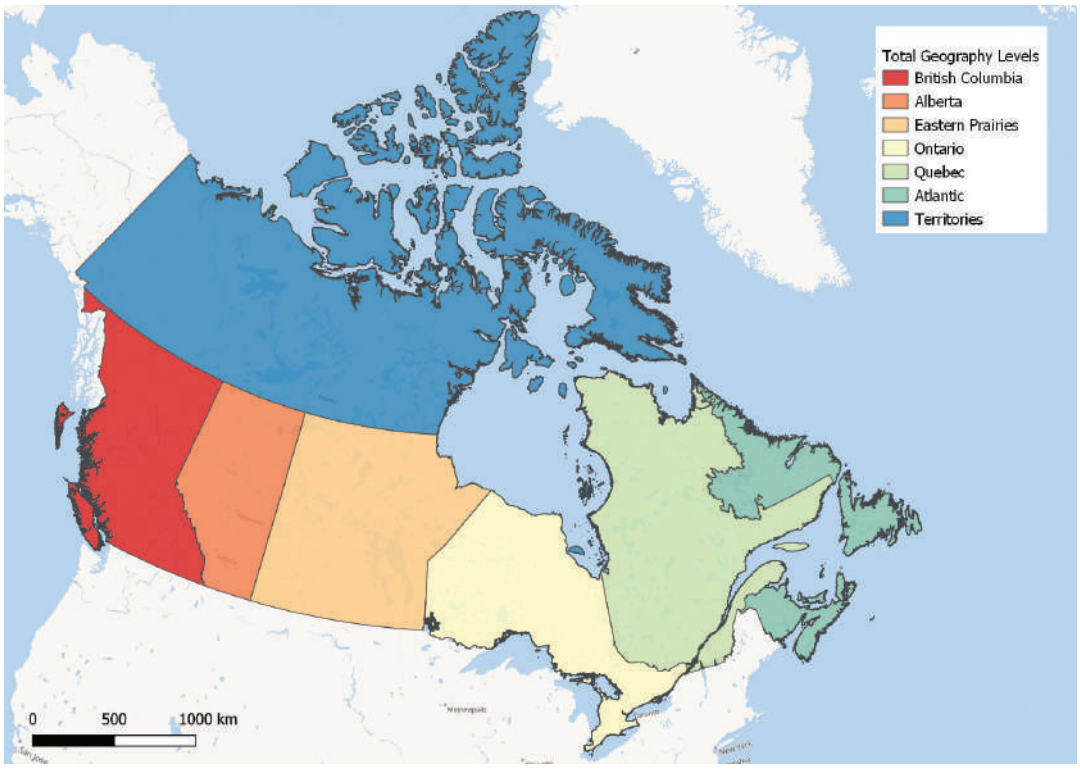
A2.4 Economic Impacts by Provincial/Territorial Geography

Table A2.4.1: Economic Impacts, GDP, in Millions of Dollars, of Indigenous Art, by Region, All Indigenous Identities, 2018.

Region	Direct GDP Impact	Direct & Indirect GDP Impacts	Direct, Indirect, and Induced GDP Impacts
British Columbia	87	150	175
Alberta	57	111	130
Eastern Prairies	73	139	162
Ontario	121	218	255
Quebec	73	120	140
Atlantic	38	75	88
Territories	38	59	69
TOTAL	**486**	**871**	**1,019**

Source: Author's Own Calculations, 2016 Census of Population, 2017 Aboriginal Peoples Survey.

Figure A2.4.1: Provincial and Territorial Geographies.



Source: Big River Analytics

A3. Advisory Group Objectives & Membership

The Advisory Group for the Indigenous Arts Economy project consists of individuals from all three Indigenous groups (First Nations, Inuit and Métis) in various artistic sectors and from Indigenous and arts organizations, as well as representatives from federal and provincial / territorial government. The Advisory Group met a total of five times, including two face-to-face meetings in Ottawa in December 2019 and February 2020. The Advisory Group provided guidance on the research methodology and analysis, and input on topics central to the study's purpose. Figure A3.1 presents the full graphic recording from the December 2019 meeting, which has select sections included throughout the report.

Figure A1.3: Advisory Meeting #3 Graphic Recording

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

Source: Advisory Group Meeting #3, Graphic Recording by Jordana Globerman, 2019

A4. Case Study Participant Biographies

Below is a non-exhaustive list of case study participants. Some participants opted to not be included in the report with individually identifiable information. Those that opted to be individually identified are listed below with a short biography and contact information.

Brandon Mitchell

From Listuguj, Quebec, Brandon Mitchell (Mi'gmaq) is the founder of Birch Bark Comics and creator of the Sacred Circles comic series, which draws on his Mi'kmaq heritage. He has also written five books with the Healthy Aboriginal Network, (Lost Innocence, Drawing Hope, River Run, Making it Right and Emily's Choice) and wrote and illustrated Jean-Paul's Daring Adventure: Stories from Old Mobile for the University of Alabama. He recently contributed the story "Migwite'tmeg: We Remember It" in the Highwater Press graphic novel anthology series "This Place:150 Years retold". Brandon is a recent graduate of the University of New Brunswick with a Masters in Education. Husband to Natasha Martin and father to Brayden and Bryce Mitchell. He is currently working for Devon Middle school as a visual literacy and Treaty Education instructor.

bnmitchell@gmail.com

Chief Lady Bird

Chief Lady Bird is a Chippewa and Potawatomi artist from Rama First Nation and Moosedeer Point First Nation, who is currently based in Toronto. She graduated from OCAD University in 2015 with a BFA in Drawing and Painting and a minor in Indigenous Visual Culture. Through her art practice, Chief Lady Bird uses street art, community-based workshops, digital illustration and mixed media work to empower and uplift Indigenous people through the subversion of colonial narratives, shifting focus to both contemporary realities and Indigenous Futurisms by creating space to discuss the nuances of our experiences.

Instagram: *@chiefladybird*
Twitter: *@chiefladybird*
Facebook: *chiefladybirdart*

chiefladybird@gmail.com

Colby Delorme

Colby Delorme is the President of NATION Imagination – The Aboriginal Gifting Co. An entrepreneur since the age of 18, he created and operated two successful companies before the age of 21 and joined The Imagination Group of Companies in 2002. Colby has been instrumental in building the companies into a dynamic organization known for its creativity, solid business practices, and disciplined execution of business strategies.

imaginationgroup.ca
authenticallyaboriginal.com
cdelorme@
imaginationgroup.ca

Gerri Sharpe

Gerri Sharpe is a grandmother of three living in Yellowknife, having grown up in Yellowknife, Gjoa Haven, and Cambridge Bay. Gerri moved to Inuvik in 1991, and lived there until 2012. A textile artist, she learned to sew from friends and community elders in Gjoa Haven. Gerri loves to sew with sealskin, creating designs, particularly diamonds or strips on the backs of mittens, are indicative of designs from Gjoa Haven.

gsharpestaples@icloud.com

Jason Brennan

Jason Brennan is a proud member of the Kitigan Zibi Anishinabeg and the owner of the award winning production company Nish Media. In 15 years, Nish has produced over 200 hours of television for various networks such as APTN, CBC, Radio-Canada, Ici ArtV, Canal D, TV5,RDI and CBC Docs. From their library, Hit The Ice, Mouki, Wapikoni, Skindigneous and Fosse aux tigres have all been screened in festivals around the world.

In 2015, Nish Media released its first feature film in Quebec theatres. “LE DEP”, written and directed by Sonia Bonspille Boileau,was selected in some of the world’s top film festivals such as the Karlovy Vary Film Festival, the Vancouver Film Festival, the Raindance Film Festival, ImagineNative and the American Indian Film Festival. Nish Media is now set to release its second feature film Rustic Oracle.

www.nishmedia.tv

Lesley Hampton

Lesley Hampton was a 'third culture kid' and her early life was one of constant relocation. Formative years spent in Canada's Arctic and Atlantic, Australia, England, Indonesia, and New Caledonia, added to her quest to establish a personal and cultural identity. Lesley defines herself through the amalgamation of the indigeneity, to her Anishinaabe and Mohawk heritage, as well as, her early nomadic upbringing. Becoming a nomad through experiences with boarding school, international school, and cross-cultural experiences, Lesley nurtured a passion for socio-cultural concepts, to help define her identity, and reconnect with her indigenous roots. Founded on the principles of inclusivity, identity, awareness, and heritage, the LESLEY HAMPTON brand’s inspiration is defined by the characteristics developed from being a Third Culture Kid and critiques their application in present day society in fashion, media, and pop culture. Diversity is at the core of every piece created by LESLEY HAMPTON; with a focus on evening-wear and occasion-wear. The brand draws inspiration from notations that embody inclusivity, and broader perceptions of beauty that leads to mental health awareness and body-positive advocacy.

lesleyhampton.com
info@lesleyhampton.com

Leslie Brown

Leslie Brown, Hilang Jaad Xiylaa (Thunder woman dancer) is born and raised on Haida Gwaii. She is a mother to three boys. It wasn't until she became a mother when she began to embrace how key it is to teach the integrity and values of Haida culture and protocol.

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Sandra Rideout

Sandra Dulcie Rideout (nee Best) is a 53 year old Inuit woman born and raised in Happy Valley-Goose Bay, Labrador to Robert and Vera Best. Sandra has been sewing for years. Her mom, Vera Best and grandmother Dulcie Montague and Aunt Jane Gear were her biggest influences to the sewing world. Sandra grew up seeing her mother and grandmother constantly making duffle coats, moose hide and duffle slippers, mukluks and moose hide mitts, canvass coats and knitting a wide variety of items. Sandra's mother and grandmother instilled a life-long love of crafting which continues to grow. She leads a busy home and work life but always finds the time to pursue her true passion; sewing.

One of Sandra's greatest recognitions was receiving the Queen Elizabeth II Diamond Jubilee Medal in 2012. She was recognized for her passion for her home land, her native traditions and her sewing.Sandra is a true believer in her culture and exercises her traditional way of life by fishing, hunting and most notably, her love for the art of sewing.

Smith Purdy

Smith Purdy is an artist of mixed Mi'kmaq, Acadian and English heritage from the Kespu'kwitk district of Mi'kmaq territory. Their work seeks to open up pathways for communication, and to explore some of the underlying metaphors which shape our interactions with the world. They draw inspiration from time spent among life; plants, animals, and other organisms, the complex web of inter-being that is ms't kikmmenaq: all our relations.

Sparkle Plenty

Sparkle Plenty is Vancouver's glamedian, weirdlesquer, and word-maker-upper who has been delivering beautifully bizarre burlesque acts for over 10 years! This fiery goddess is Cree and Metis with mixed heritage and is a proud sister of the first-ever all Indigenous burlesque group, Virago Nation. You can find her teasing and emceeing with the Screaming Chicken Theatrical Society as well as on stages all over Vancouver, Toronto, Las Vegas, and more.

Virago Nation a collective of Indigenous artists creating performance through burlesque, theatre, song, and spoken word as well as workshops, and community networks rematriating Indigenous sexuality.

Founded in May 2016, Virago Nation is on a mission to reclaim Indigenous sexuality from the toxic effects of colonization. Through humour, seduction, pop culture and politics they will show that Indigenous women will not be confined to the colonial virgin-whore dichotomy but will design a new dynamic and multi-faceted sexual identity rooted in their own desires.

Talitha Tolles

Talitha Tolles (28, she/her) is a Queer Activist, Motivational Speaker, Facilitator, Storyteller, Artist an above all else a strong, resilient, Metis womxn. Her ancestors were Drummond Island Voyageurs and settled in Penetanguishene. Through her work Talitha ensures a people first approach and operates through a framework that is committed to equity, always. Talitha has worked with over 300,000 + people to engage in active citizenship by promoting awareness, agency and support for Indigenous populations. Talitha is currently participating in a six-month residency program with Akin collective and Collision Gallery creating a series of works for her solo show called Reparations. This gallery show will speak themes of healing trauma, identity, and love.

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Tara Audibert

Tara Audibert is a multidisciplinary artist, film maker, cartoonist, animator, and podcaster. She owns and runs Moxy Fox Studio where she creates her award-winning works, including the animated short film The Importance of Dreaming, comics This Place: 150 Years Retold and Lost Innocence, and “Nitap: Legends of the First Nations” an animated storytelling app. She is of Wolastoqey/French heritage and resides in Sunny Corner, NB, Canada. You can find her online at MoxyFox.ca

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Tenille Campbell

Tenille K Campbell is an Dené/Métis photographer and poet, studying at the UofS. She is a firm believer that coffee can fix any problem and that reading a good book is a great way to start the day.

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Trenton Pierre

Trenton Pierre(sɬə́məxʷ) is a Katzie First Nations artist and creator of RainAwakens - hoping to shape the future generation with his artwork, and make his mark in the world as an influencer to drive people to go after their dreams and ignite their passions. #spreadthelove

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