



CALGARY'S ARTS OPERATIONS:

2023/24 ECONOMIC IMPACT ANALYSIS

MAY 2025



ABOUT THIS REPORT

This report was prepared by Root Economy for the exclusive use of Calgary Arts Development in accordance with the engagement agreement dated February 5, 2025. It is intended solely for Calgary Arts Development and for the purposes outlined in the scope of work. Root Economy accepts no responsibility for use of this report by any third party.

At the request of Calgary Arts Development, Root Economy conducted an economic impact assessment of the 2023/24 fiscal year operations of over 193 arts organizations supported through its operating grant program. The analysis is based on financial and operational data provided by Calgary Arts Development, including expenditures, payroll, and categorized spending on goods and services. All data reflect nominal dollars for the 2023/24 fiscal year.

The assessment uses the 2021 Statistics Canada Interprovincial Input-Output Model to estimate the economic contribution of these arts activities to both the Alberta and Canadian economies. While this model is widely recognized and robust, it reflects the economic structure as of 2021, and some differences may exist compared to present-day conditions.

The results reflect three categories of impact:

- Direct impacts from the day-to-day operations of arts organizations
- Indirect impacts from spending on suppliers and services
- Induced impacts from employee household spending

Root Economy reviewed the submitted data for consistency but relied on the accuracy and completeness of the information provided by Calgary Arts Development. This report may not be used or shared beyond its intended purpose without written permission from Root Economy.

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EXECUTIVE SUMMARY

CALGARY'S ARTS OPERATIONS

2023/24 Economic Impact Analysis

Prepared by Root Economy | May 2025

ECONOMIC CONTRIBUTION

In 2023/24, 193 Calgary-based, not-for-profit arts organizations funded by Calgary Arts Development collectively generated \$168 million in GDP, supported 1,387 full-time equivalent (FTE) jobs, and contributed \$31 million in tax revenue to municipal, provincial, and federal governments across Canada. These results reflect a significant rebound from pandemic-era lows, highlighting the resilience and economic vitality of Calgary's arts sector.

SECTOR REVENUE AND SPENDING

Arts organizations reported \$154.5 million in both revenue and expenditure.

Spending was primarily allocated to:

- Artistic programming – 53%
- Administration – 20%
- Facilities – 13%
- Marketing and communications – 9%
- Fundraising – 5%

This investment generated strong returns:

- \$1.09 in GDP per \$1 spent
- \$0.20 in public tax revenue per \$1 spent

GDP AND EMPLOYMENT IMPACTS

\$168M GDP impact across Canada:

- **Direct:** \$55M
- **Indirect:** \$79M
- **Induced:** \$35M

\$134M of GDP was generated in Alberta, and \$34M in other provinces.

1,387 Jobs across Canada:

- 537 FTEs (direct)
- 630 FTEs (indirect)
- 220 FTEs (induced)

1,127 jobs (81%) were sustained in Alberta, and 260 in other provinces.

TAX REVENUE IMPACT

Calgary's non-profit arts organizations generated \$31 million in gross tax revenue:

- **Municipal:** \$2.83M
- **Provincial:** \$13.74M
- **Federal:** \$14.46M

Roughly 75% of tax revenue was generated in Alberta. Taxes included product taxes (GST, PST), production taxes (property, licenses), and income tax from employment.

VOLUNTEER CONTRIBUTION

Over 23,252 volunteers—including 1,574 board members and 21,678 community volunteers—contributed 538,473 hours, valued at \$20.84 million. This is equivalent to 259 FTEs, showcasing the crucial civic role of volunteerism in Calgary's cultural life.

BEYOND ECONOMICS

While this study focuses on economic impacts, Calgary's arts organizations contribute to city vibrancy, social cohesion, youth development, intercultural understanding, mental health, and sustainability. Their influence extends far beyond dollars and jobs—making Calgary a more livable, innovative, and inclusive city.



(L TO R) HELEN KNIGHT, NATHAN SCHMIDT, BAHAREH YARAGHI, BRADEN GRIFFITHS IN THEATRE CALGARY'S METEOR SHOWER (2024) + PHOTO: TRUDIE LEE

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STUDY OVERVIEW

MEASURING THE ECONOMIC IMPACT OF CALGARY'S FUNDED ARTS ORGANIZATIONS (2023/24)

Calgary Arts Development engaged Root Economy to conduct an economic impact assessment of the 2023/24 operations of 193 not-for-profit arts organizations supported through its operating grant program. Referred to throughout this report as “Arts Operations,” these organizations represent the core of Calgary’s non-profit arts sector and contribute significantly to the city’s cultural and economic vitality.

While this analysis focuses on publicly funded non-profit organizations, it does not encompass the full breadth of Calgary’s arts ecosystem. The broader creative economy—including for-profit cultural enterprises, commercial galleries, private studios, and independent artists—is considerably larger in both scale and impact than the 193 organizations assessed here. Nonetheless, the group analyzed in this study reflects the publicly supported backbone of Calgary’s arts infrastructure.

This report estimates the direct, indirect, and induced economic impacts of Arts Operations using the 2021 Statistics Canada Interprovincial Input-Output Model.

Impacts are measured across key indicators:

- GDP (value added)
- Employment (full-time equivalent jobs)
- Labour income
- Government tax revenues

The findings show that Calgary’s funded arts organizations generated significant economic value in 2023/24, largely through their expenditures on labour, goods, and services. Despite ongoing challenges following the COVID-19 pandemic, the sector demonstrated resilience, with many organizations prioritizing wages and employment continuity.

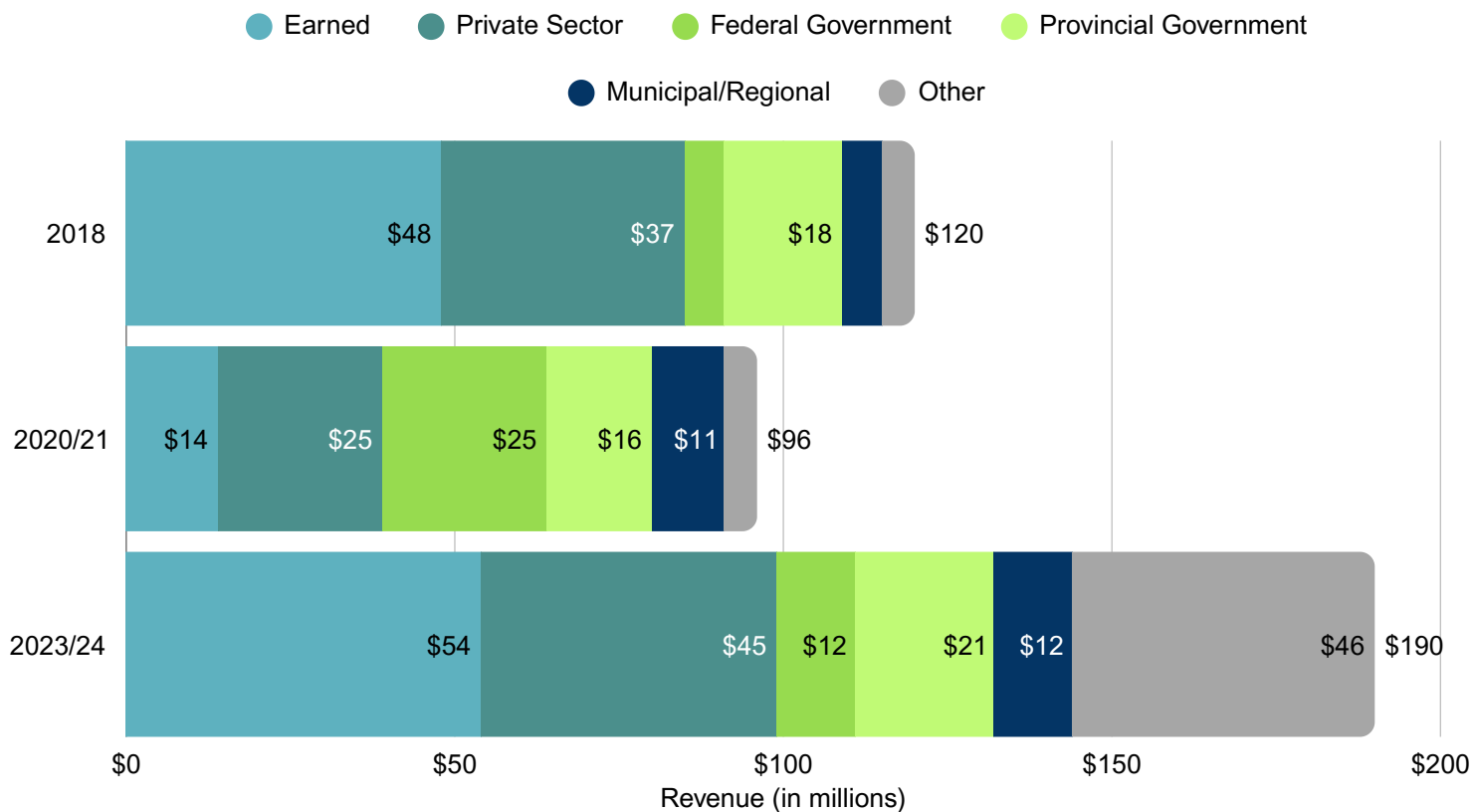
While this report focuses on quantifiable economic impacts, it does not include analysis of the broader context or intangible benefits that a thriving arts ecosystem brings—such as cultural vitality, social cohesion, youth engagement, or city branding. These dynamic contributions, while not captured in the input-output model, remain essential to Calgary’s identity and long-term prosperity.

REVENUES OVERVIEW: SIGNS OF RECOVERY AND GROWTH

Although revenue is not used to calculate economic impact, it offers important insight into the financial health and resilience of Calgary's arts sector. In 2023/24, arts operations generated approximately \$154.5 million in total revenue—a clear sign of recovery following the COVID-19 pandemic.

By comparison, revenues stood at \$120 million in 2018 and dropped to \$96 million in 2020/21 due to widespread cancellations and disruptions. This year's results reflect a strong rebound from those pandemic-era lows.

REVENUE BREAKDOWN OF CALGARY'S ART ORGANIZATIONS



FISCAL YEAR	TOTAL REVENUE	NUMBER OF ORGANIZATIONS
2018	\$120 million	156
2020/21	\$96 million	166
2023/24	\$154.5 million	193

SOURCES: CALGARY ARTS DEVELOPMENT. ORGANIZATIONAL REVENUE DATA, 2018, 2020/21, AND 2023/24. INTERNAL DATA SET. ANALYSIS BY ROOT ECONOMY, 2025.

REVENUE COMPOSITION IN 2023/24

Earned Revenue: 28% of total revenue (\$54M) came from admissions, ticket sales, facility rentals, memberships, and workshops.

Public Sector Funding: Contributed 29% of total revenue (\$45M), with:

- **Provincial Government:** 11% (\$21M)
- **Municipal/Regional** (including Calgary Arts Development): 6% (\$12M)
- **Federal Government:** 6% (\$12M)

Private Sector Support: Accounted for 24% (\$45M), including individual donations, corporate sponsorships, foundation grants, and in-kind contributions.

Other Revenue: 24% (\$46M) came from investment income and miscellaneous sources.

A Pillar for Stability and Leverage

Calgary Arts Development's investment remained a necessary element of financial stability for many organizations in 2023/24. This support not only enabled organizations to sustain core operations but also played a critical role in leveraging additional public and private funding. In the post-pandemic period, municipal funding in particular has remained essential for helping arts organizations rebuild programming capacity, reconnect with audiences, and strengthen long-term resilience.



LUMINOUS SPACE AT KIYOOKA OHE ARTS CENTRE
PHOTO BY ALAN FORTUNE
COURTESY OF CALGARY ARTS DEVELOPMENT

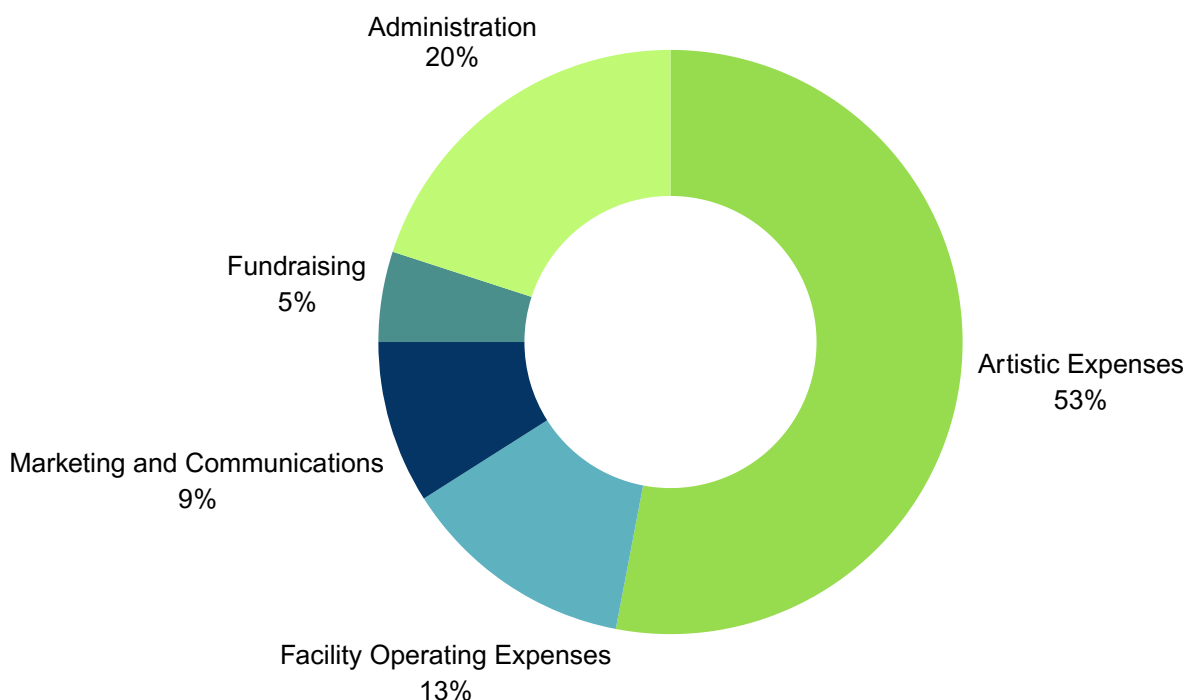
TOTAL EXPENDITURE: \$154.5 million

EXPENDITURE OVERVIEW: HOW CALGARY'S ARTS ORGANIZATIONS SPENT \$154.5M IN 2023/24

In 2023/24, 193 of Calgary's arts organizations collectively reported expenditures of \$154.5 million, marking a significant recovery and growth from previous years. For context, total spending in the sector was approximately \$120 million in 2016/17 from a total of 156 organizations, and dropped to \$83 million from 160 organizations in 2020/21 during the height of the COVID-19 pandemic.

In 2023/24, 193 arts organizations in Calgary collectively employed 742 individuals across artistic, administrative, and operational roles -- rebuilding capacity and expanding programming post-pandemic.

EXPENDITURE BREAKDOWN: CALGARY ARTS ORGANIZATIONS (2023/24)



SOURCES: CALGARY ARTS DEVELOPMENT. ORGANIZATIONAL REVENUE DATA, 2018, 2020/21, AND 2023/24. INTERNAL DATA SET. ANALYSIS BY ROOT ECONOMY, 2025.



SPRINGBOARD-FLUIDFEST (OCTOBER, 2022)
COURTESY OF CALGARY ARTS DEVELOPMENT

A CLOSER LOOK AT HOW FUNDS WERE ALLOCATED REVEALS THE EVOLVING PRIORITIES AND OPERATIONAL NEEDS OF THE ARTS SECTOR:

- **Artistic expenses** accounted for the largest share of spending at 53% (\$82.3 million). This category includes fees for artists and cultural professionals, production and technical costs, program delivery, and touring. These investments are core to the sector's mandate of creative expression, cultural presentation, and public engagement.
- **Administrative costs** represented 20% (\$30.5 million) of total expenditures, encompassing salaries for operational staff, professional services, and rent or mortgage payments for administrative space.
- **Facility operating expenses** made up 13% (\$20.5 million). These include costs related to maintaining and staffing the physical spaces that support creation, performance, rehearsal, and storage. As organizations resumed in-person activities, facility-related costs rose accordingly.
- **Marketing and communications** accounted for 9% (\$13.8 million). This includes salaries for marketing staff, advertising and promotional materials, public relations efforts, and consultant support. The investment highlights the sector's renewed focus on reconnecting with audiences and rebuilding public visibility post-pandemic.
- **Fundraising expenses**, though the smallest category at 5% (\$7.5 million), remain essential to long-term sustainability. These costs include staffing for development roles, donor engagement, fundraising events, and grant writing support.

MEASURING THE ECONOMIC IMPACT OF CALGARY'S ARTS ORGANIZATIONS

NATIONAL ECONOMIC FOOTPRINT OF CALGARY'S ARTS SECTOR (2023/24)

CALGARY'S ARTS ORGANIZATIONS DON'T JUST INSPIRE — THEY GROW THE ECONOMY. EVERY \$1 SPENT BY CALGARY'S ARTS ORGANIZATIONS GENERATES \$1.09 IN GDP.

Despite lingering challenges from the post-pandemic recovery period—such as inflationary pressures, rising operational costs, and shifting audience behaviours—Calgary's arts organizations maintained a strong economic presence. In 2023/24, the combined operating and sustaining capital expenditures of 193 Calgary-based, not-for-profit arts organizations funded by Calgary Arts Development generated an estimated \$163 million in value-added GDP to the Canadian economy.

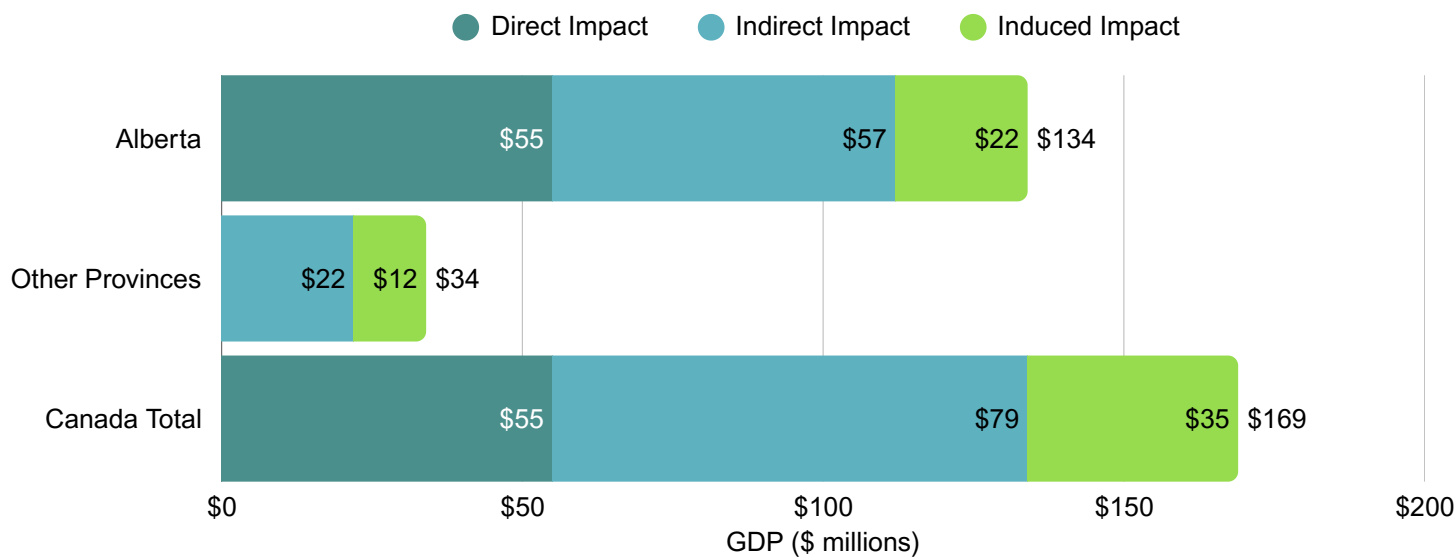
This figure captures the direct, indirect, and induced impacts of the sector's spending and reflects the broad economic contributions of Calgary's arts operations both within Alberta and across the country. It is a conservative estimate that does not include impacts from visitor spending or the larger for-profit arts sector.

Calgary's Non-Profit Arts Operations Drive \$168M in Value Added GDP — Fueling \$152M in Alberta and \$16M Across Canada



KIEZSA WITH THE CALGARY PHILHARMONIC ORCHESTRA | PHOTO: DENNIS ENVOLDSEN

GDP CONTRIBUTIONS OF CALGARY'S ARTS ORGANIZATIONS ACROSS CANADA (2023/24)



SOURCES: CALGARY ARTS DEVELOPMENT. ORGANIZATIONAL REVENUE DATA, 2023/24. INTERNAL DATA SET..ANALYSIS BY ROOT ECONOMY, 2025.



ALBERTA IMPACT

Within Alberta, arts organization expenditures generated \$134 million in GDP, comprising:

- **\$55 million in direct impacts** — the immediate value added through wages, salaries, and business output;
- **\$57 million in indirect impacts** — activity generated along the supply chain, including production inputs and professional services;
- **\$22 million in induced impacts** — economic activity generated by employee household spending.

Calgary's art organizations continue to act as a critical local economic anchor, supporting jobs, vendor networks, and cultural infrastructure in Calgary and across the province.



CCALGARY INTERNATIONAL FILM FESTIVAL | PHOTO:
MICHAEL GRONDIN

IMPACT ACROSS OTHER PROVINCES

The economic reach of Calgary's arts operations extended well beyond provincial borders. Spending on specialized goods and services sourced from out-of-province suppliers — including artist and agency fees, equipment, and technical services — contributed an additional \$34 million in GDP to other provinces:

- \$22 million in indirect impacts
- \$12 million in induced impacts

These interprovincial impacts highlight the national ripple effects created by Calgary's arts organizations through their procurement and contracting decisions.

TOTAL ECONOMIC IMPACT IN CANADA

Taken together, the total GDP contribution from Calgary's arts operations in 2023/24 was approximately \$168 million across Canada:

- Direct impact: \$55 million
- Indirect impact: \$79 million
- Induced impact: \$35 million

Note: While previous studies (e.g., 2016/17 and 2020/21) showed significant contributions by the sector, the 2023/24 results demonstrate a notable advancement in total GDP impact. However, because methodology refinements and data scope differ year to year, direct comparisons should be made with caution.

EMPLOYMENT IMPACTS OF CALGARY'S ARTS ORGANIZATIONS (2023/24)

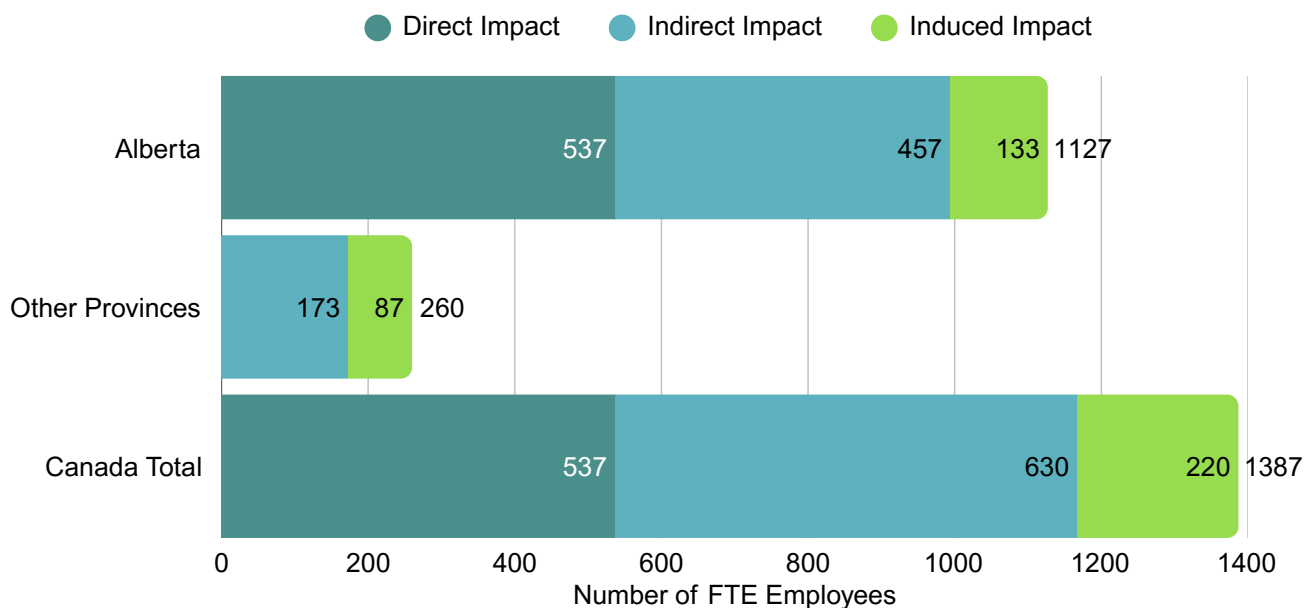
In 2023/24, the operating and sustaining capital expenditures of Calgary's non-profit arts organizations supported an estimated 1,387 full-time equivalent (FTE) jobs across Canada. Of these, 1,127 FTEs were sustained in Alberta, highlighting the sector's strong local employment footprint. The remaining 260 FTEs were supported in other provinces, primarily through indirect and induced impacts linked to the purchase of goods, services, and professional fees outside of Alberta.

Calgary's Non-Profit Arts Organizations: Powering Over 1,387 Jobs Nationwide.

- Direct employment totaled 537 FTEs, all of which were located in Alberta, reflecting staff directly employed by Calgary-based arts organizations.
- Indirect impacts—jobs created through the sector's supply chain, such as vendors, service providers, and production partners—accounted for 630 FTEs, with 457 jobs in Alberta and 173 jobs in other provinces.
- Induced impacts, representing jobs supported by the household spending of those directly and indirectly employed, added another 220 FTEs, including 133 in Alberta and 87 in other provinces.

In total, 1,127 FTEs were sustained in Alberta, underscoring the sector's strong local employment footprint. An additional 260 FTEs were sustained in other provinces, primarily through indirect and induced channels tied to out-of-province goods, services, and fees.

EMPLOYMENT IMPACT OF CALGARY'S ARTS ORGANIZATIONS ACROSS CANADA (2023/24)



SOURCES: CALGARY ARTS DEVELOPMENT. ORGANIZATIONAL REVENUE DATA, 2023/24. INTERNAL DATA SET. ANALYSIS BY ROOT ECONOMY, 2025.

TAX REVENUES ATTRIBUTED TO CALGARY ARTS ORGANIZATIONS: NATIONWIDE IMPACT (2023/24)

\$31M IN ESTIMATED TAXES ACROSS GOVERNMENT LEVELS IN CANADA

FOR EVERY \$1 SPENT BY CALGARY'S NON-PROFIT ARTS ORGANIZATIONS, APPROXIMATELY \$0.20 IN PUBLIC TAX REVENUE IS GENERATED.



Calgary's non-profit arts sector generated an estimated \$31 million in gross tax revenues across municipal, provincial, and federal levels of government in 2023/24. The majority of these revenues—approximately \$23.4 million—were generated within Alberta, including:

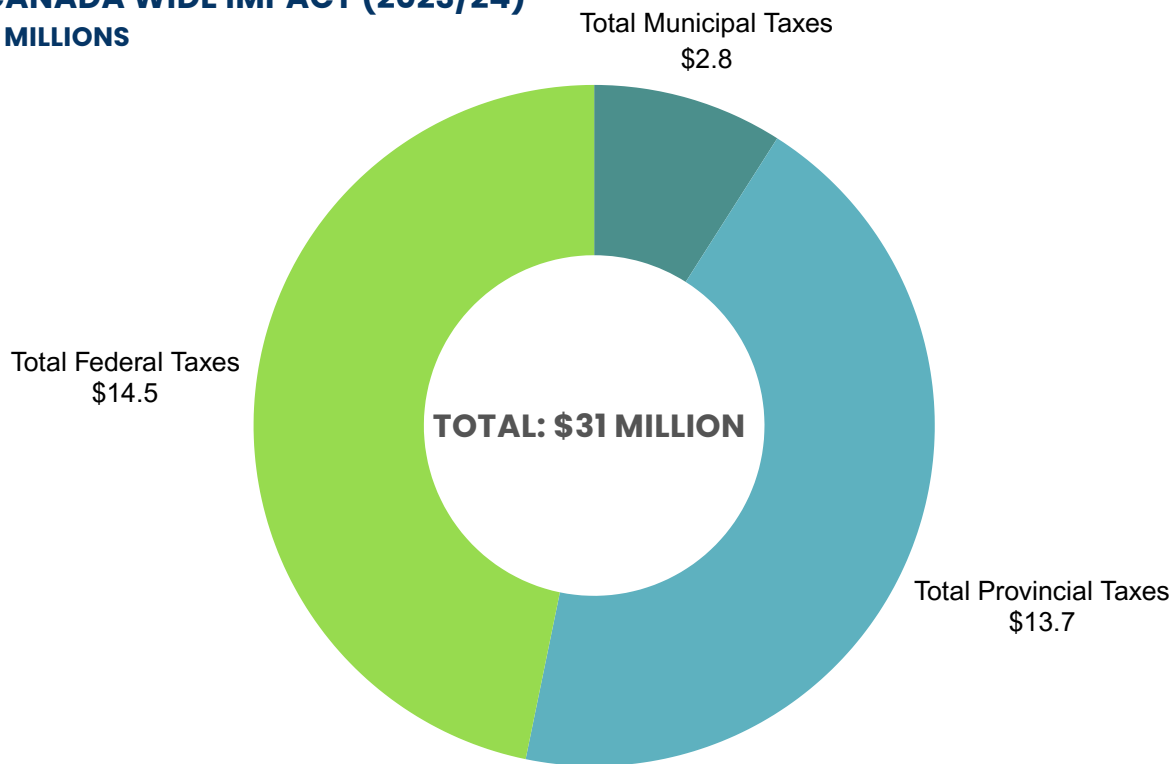
- \$1.9 million in municipal tax revenues
- \$10.2 million in provincial tax revenues
- \$11.4 million in federal tax revenues

In addition to Alberta-based impacts, the sector's activity contributed an estimated \$7.6 million in tax revenues outside the province, distributed across other provinces and the federal government. These revenues were generated indirectly through supply chain spending, employee expenditures, and induced economic activity.

76% of tax revenue is generated within Alberta, while the remaining 24% originates from outside the province—highlighting the national fiscal reach of Calgary's non-profit arts sector.

TAX REVENUES ATTRIBUTED TO CALGARY ARTS OPERATIONS, CANADA WIDE IMPACT (2023/24)

\$ MILLIONS



SOURCES: CALGARY ARTS DEVELOPMENT. ORGANIZATIONAL REVENUE DATA, 2023/24. INTERNAL DATA SET. ANALYSIS BY ROOT ECONOMY, 2025.

BREAKDOWN OF TAX REVENUES GENERATED BY CALGARY'S ARTS SECTOR 2023/24 (IN MILLIONS)

TAX TYPE	ALBERTA	OTHER PROVINCES	CANADA TOTAL
MUNICIPAL TAXES			
– on Products	0.09	0.01	0.1
– on Productions	1.82	0.91	2.73
Subtotal	1.91	0.92	2.83
PROVINCIAL TAXES			
– on Products	\$1.55	\$1.09	\$2.64
– on Productions	\$0.86	\$0.40	\$1.26
– Income Tax	\$7.73	\$2.10	\$9.83
Subtotal	\$10.15	\$3.59	\$13.74

TAX TYPE	ALBERTA	OTHER PROVINCES	CANADA TOTAL
FEDERAL TAXES			
– on Products	\$2.22	\$0.58	\$2.80
– on Productions	\$0.03	\$0.01	\$0.04
– Income Tax	\$9.14	\$2.48	\$11.62
Subtotal	\$11.39	\$3.07	\$14.46
TOTAL TAXES	\$23.44	\$7.59	\$31.03

SOURCES: CALGARY ARTS DEVELOPMENT. ORGANIZATIONAL REVENUE DATA, 2023/24. INTERNAL DATA SET. ANALYSIS BY ROOT ECONOMY, 2025.



The government revenue estimates presented in this report capture both product and production tax categories arising from Calgary’s arts organization activity. These estimates include income tax revenues generated through direct, indirect, and induced employment supported by the sector. All figures represent **gross tax revenues**, which do not account for government subsidies, tax credits, or grants.

Taxes on products include the federal Goods and Services Tax (GST), provincial sales taxes (applicable outside Alberta), harmonized sales tax (HST), fuel taxes, and various excise and amusement taxes. These consumption-based taxes reflect the economic output and spending patterns triggered by arts organizations.

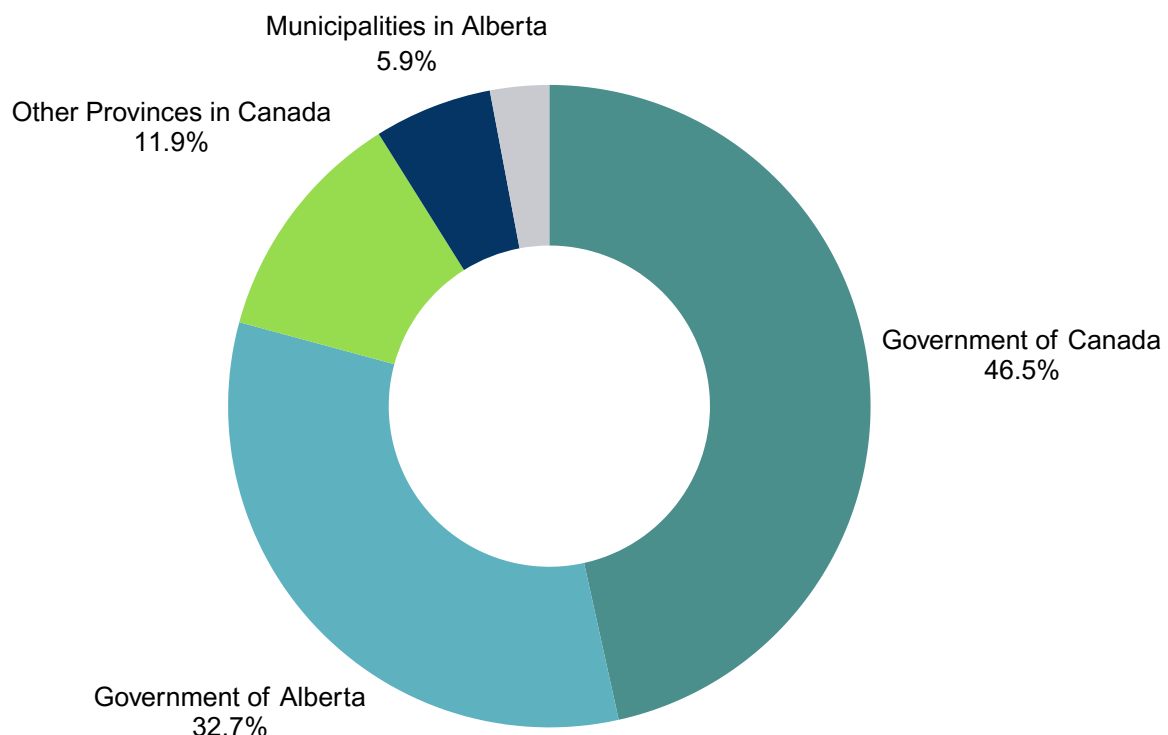
INSIKIM RETURN OF THE BUFFALO BY CANADIAN ACADEMY OF MASK AND PUPPETRY | PHOTO: PETER BALKWILL

Taxes on production include capital taxes levied on corporate entities, land transfer taxes, and municipal levies like property taxes, licences, and permit fees.

Income taxes are derived from wages and salaries paid to individuals employed directly in the arts organizations, as well as those supported indirectly through the supply chain and induced through household spending. These include both federal and provincial personal income taxes, estimated using effective tax rates applied to total labour income.

WHO BENEFITS? GOVERNMENT REVENUE BREAKDOWN

Calgary's arts operations generated public revenue that accrued to multiple levels of government. The distribution of these revenues reflects both local and national benefits.



SOURCES: CALGARY ARTS DEVELOPMENT. ORGANIZATIONAL REVENUE DATA, 2023/24. INTERNAL DATA SET. ANALYSIS BY ROOT ECONOMY, 2025.

POWERING THE ARTS WITH HEART: 23,000 VOLUNTEERS, \$20 MILLION IN DONATED LABOUR

VOLUNTEERS AND IN-KIND CONTRIBUTIONS

Volunteers play an essential role in sustaining Calgary's arts organizations, contributing not just their time but also their expertise, energy, and commitment to enriching the city's cultural life. In 2023/24, more than 23,252 volunteers—including 1,574 board members and 21,678 community volunteers—supported arts programming, operations, and events across the city. Their collective efforts ensured that organizations could deliver accessible, high-quality experiences despite limited staffing and resources.

Together, these volunteers donated approximately 538,473 hours of service. When valued at the average nonprofit sector wage of \$38.70 per hour, this contribution amounts to an estimated \$20.84 million in donated labour, equivalent to 259 full-time jobs. This remarkable level of civic engagement highlights the deep community investment in Calgary's cultural sector and the critical role of volunteerism in its ongoing success.

Volunteers at Calgary's non-profit art organizations contributed over \$20 million in unpaid labour—fueling Calgary's arts sector with the equivalent of 259 full-time jobs.



TEGAN AND SARA AT CALGARY INTERNATIONAL FILM FESTIVAL
| PHOTO: JESSE GILLET

BEYOND THE NUMBERS: THE ARTS AS A CATALYST FOR CALGARY'S FUTURE

While this analysis focuses on measurable economic impacts from operating expenditures, Calgary's arts sector also generates a wide range of dynamic and intangible benefits that extend well beyond what input-output models can quantify. These broader impacts play a vital role in shaping the social, cultural, and economic vitality of the city.



KATE WYATT QUARTET PRESENTED BY BUCKINGHAM PALACE | PHOTO: LEYA RUSSELL

BUILDING MORE THAN JUST STAGES

Arts venues in Calgary—especially those concentrated downtown—anchor real estate activity and urban renewal. Their presence sparks surrounding investment in commercial and residential development, enhances property values, and activates public spaces.

The redevelopment around Arts Commons and Stephen Avenue is a clear example of this catalytic effect.

FUELING MAIN STREET ECONOMIES

Local businesses flourish around arts hubs, as arts audiences drive increased foot traffic and spending at nearby restaurants, shops, and hospitality venues.

MAKING CITIES PEOPLE LOVE TO LIVE IN

Arts elevate Calgary's quality of life, attracting and retaining skilled workers, students, and entrepreneurs. Cultural amenities enhance civic pride, international reputation, and make the city more livable, inclusive, and globally competitive. *The annual Calgary International Film Festival and Beakerhead are just two examples that help position Calgary as a culturally vibrant city.*

GROWING MINDS AND OPPORTUNITIES

Through education programs, outreach, and scholarships, arts organizations nurture the next generation of creatives and innovators. They offer platforms for youth expression, mentorship, and community leadership. *Organizations like Alberta Ballet School provide robust youth arts programming and training.*

BRIDGING CULTURES AND HONOURING STORIES

The arts foster intercultural understanding, celebrate Indigenous traditions, and promote reconciliation. Calgary's cultural scene reflects the city's diversity, builds shared identity, and deepens community connection. *Indigenous-led organizations like Making Treaty 7 and events at the National Music Centre celebrate and preserve cultural narratives.*

SPARKING INNOVATION EVERYWHERE

As a key pillar of the creative economy, the arts stimulate innovation across sectors—from digital media and design to education and health care—by building critical skills like storytelling, collaboration, and design thinking. *Calgary's cSPACE acts as a creative incubator, housing arts-based entrepreneurs and social innovators.*

INSPIRING HEALTH AND HEALING

Participation in the arts enhances mental well-being, reduces social isolation, and supports therapeutic programs for seniors, youth, and underserved groups. Creative spaces offer room for reflection, healing, and resilience.

GREENING THE FUTURE THROUGH ART

Artists raise awareness about environmental issues and help shape public dialogue on sustainability. Many arts organizations model green practices in operations and production, contributing to a culture of climate responsibility.



OKAN! PRESENTED BY BUCKINGHAM PALACE
| PHOTO: LEYA RUSSELL

APPENDIX A:

DATA SOURCES AND METHODOLOGY

This economic impact assessment, conducted by Root Economy, is based on actual expenditure data from Calgary's arts organizations for the 2023/24 fiscal year. The focus is on operating and sustaining capital expenditures, which reflect the day-to-day activities of arts organizations and provide a conservative, evidence-based estimate of their economic contribution. The analysis captures direct, indirect, and induced impacts across Alberta and Canada's economy.

AN ASSESSMENT BASED ON OPERATING EXPENDITURES

The model measures the ripple effects of operating expenditures made by Calgary's arts organizations. These expenses represent injections of new spending into the economy and exclude revenue streams like ticket or concession sales. Key data sources include audited or reviewed financial statements and detailed expense breakdowns submitted by Calgary Arts Development-funded organizations.

Expenditures included in the model:

- Staff salaries and benefits
- General administration and office costs
- Occupancy and building operations
- Production and equipment
- Fees paid to artists, including those from out of province
- Marketing and communications
- Fundraising and corporate sales
- Merchandise operations, food and beverage, and self-programming
- Special event venue costs
- Sustaining (maintenance) capital expenditures

Excluded from the analysis:

- New capital construction projects
- Out-of-province visitor spending (e.g., hotels, dining, tourism)

Although many organizations operate near breakeven as not-for-profits, any surpluses are treated as additional local income for modeling purposes.

KEY CONCEPTS OF ECONOMIC IMPACT ASSESSMENT

Economic impact analysis quantifies how spending on goods and services creates cascading effects throughout the economy. The more locally integrated the economy is, the stronger the multiplier effects.

The model estimates impact across three levels:

- **Direct Impacts:** These represent the immediate economic activity generated by arts organizations themselves. This includes wages paid to staff, fees to artists and contractors, and expenditures on goods and services necessary for operations—such as venue rentals, utilities, and programming costs.
- **Indirect Impacts:** These arise from the business-to-business purchases made by suppliers to arts organizations. For example, when a marketing agency, catering service, or equipment rental company receives payment from an arts organization, they in turn purchase goods and services from other businesses, triggering further economic activity throughout the supply chain.
- **Induced Impacts:** Induced impacts capture the ripple effect of household spending. As employees of arts organizations and their suppliers spend their earnings on everyday goods and services—such as groceries, housing, and transportation—they stimulate additional economic activity across a wide range of sectors in the local economy.

KEY MEASURES REPORTED

- **GDP (Value Added):** Gross Domestic Product (GDP), or value added, measures the total economic wealth created through productive activity. It includes wages and salaries, income from unincorporated businesses, and corporate profits. In this study, GDP reflects the new economic value generated in Alberta and across Canada by the ongoing operations and spending of Calgary's arts organizations.
- **Employment:** Employment impacts are measured in full-time equivalent (FTE) positions, which standardize all jobs based on the amount of work performed over the course of a year. For example, two part-time roles may count as one FTE if their combined hours are equivalent to a full-time position. This measure captures sustained employment linked to annual expenditures, regardless of whether individual roles were full- or part-time.
- **Labour Income:** Labour income includes all wages, salaries, and employer-paid benefits such as pensions, employment insurance, payroll taxes, and workers' compensation. As a key component of GDP, it represents the share of economic value that flows directly to households.
- **Government Revenues:** This refers to the tax revenues generated by the economic activity of arts organizations, including taxes collected at the municipal, provincial, and federal levels. The study reports gross government revenues, meaning that grants, credits, or subsidies received are not deducted from these figures.

INPUT-OUTPUT MODEL OVERVIEW

Root Economy used the Culture, Arts, Heritage, and Sport Economic Impact Model (CAHSEIM) to estimate the economic contribution of Calgary's arts organizations in 2023/24. Developed by the Policy Research Group at the Department of Canadian Heritage, CAHSEIM is a nationally recognized and rigorously validated tool used to assess the economic footprint of cultural and sport-related activities across Canada.

The model is based on Statistics Canada's Supply and Use Tables (formerly known as Input-Output Tables), which provide a comprehensive framework for understanding how goods and services are produced, exchanged, and consumed throughout the Canadian economy. These tables enable the estimation of direct, indirect, and induced economic effects, capturing the full ripple effect of cultural spending across sectors.

CAHSEIM also incorporates data from the Interprovincial Input-Output Model, which accounts for trade flows between provinces, regional production differences, and local consumption patterns. The version used for this analysis is based on the most recent 2018 benchmark data.

By factoring in the broader impacts of arts sector spending—such as supplier purchases, employment income, and re-spending in the local economy—this methodology provides a detailed and holistic picture of the arts sector's economic contribution to Calgary in 2023/24.

ANALYTICAL APPROACH

Root Economy applied a structured and conservative approach to this analysis. Verified 2023/24 expenditure data—covering both operating and sustaining capital costs—were gathered from Calgary arts organizations, classified by commodity, and tailored to reflect Alberta-based spending only. This refined dataset was then modeled using CAHSEIM to simulate economic ripple effects across the provincial and national economies. The resulting outputs quantified the arts sector's total economic contribution in terms of employment, GDP, labour income, and tax revenues.

APPENDIX B: LIST OF ARTS ORGANIZATIONS SUPPORTED BY CALGARY ARTS DEVELOPMENT

1. Acoustic Music Society
2. Adult Recreational Choir
3. Alberta Ballet
4. Alberta Craft Council
5. Alberta Dance Theatre For Young People
6. Alberta Magazine Publishers Association
7. Alberta Media Arts Alliance Society (AMAAS)
8. Alberta Music
9. Alberta Playwrights' Network
10. Alberta Printmakers
11. Alberta Theatre Projects
12. Alcove Centre for the Arts
13. Alexandra Writers' Centre
14. Alliance Française of Calgary
15. Amici String Program
16. Antyx Community Arts
17. Bach Tots
18. Ballet Bodies YYC
19. Beltline Neighbourhoods Association
20. BJP Music Foundation
21. Blues Fest
22. Book Publishers Association of Alberta
23. Brazilian Community Association of Alberta
24. Burnt Toast Studio
25. Calgary Allied Arts Foundation
26. Calgary Animated Objects
27. Calgary Bach Society
28. Calgary Black Film Festival
29. Calgary Boys' Choir
30. Calgary Children's Choir
31. Calgary Chinese Orchestra
32. Calgary Cinematheque
33. Calgary Civic Symphony
34. Calgary Concert Band
35. Calgary Fiddlers Association
36. Calgary Folk Music Festival
37. Calgary Foothills Barbershop Chorus
38. Calgary Girls Choir
39. Calgary International Film Festival
40. Calgary International Fringe Festival
41. Calgary Jazz Orchestra
42. Calgary Justice Film Festival
43. Calgary Men's Chorus
44. Calgary Multicultural Choir
45. Calgary Opera
46. Calgary Performing Arts Festival
47. Calgary Philharmonic Orchestra
48. Calgary Pro Musica
49. Calgary Protospace
50. Calgary Queer Arts Society
51. Calgary Reggae Festival
52. Calgary Renaissance Singers & Players
53. Calgary Round-Up Band
54. Calgary Society of Independent Filmmakers (CSIF)
55. Calgary Underground Film Festival
56. Calgary Women's Chorus
57. Calgary Young People's Theatre
58. Calgary Youth Orchestra
59. Canadian Academy of Mask and Puppetry
60. Canadian Artists Against Poverty
61. Canadian Music Centre, Prairie Region
62. Cantare Children's Choir
63. CARFAC Alberta (Visual Arts Alberta Association)
64. Carifest Calgary
65. Casa Mexico
66. Chromatic Theatre
67. CIF Reconciliation Society
68. Cirque Nuit Arts Foundation
69. CJSW Radio
70. CKUA RADIO FOUNDATION
71. Classical Guitar Society
72. Concino Chorus and Collaborative Arts Society
73. Corps Bara Dance Theatre
74. DANCE YYC COMMUNITY OUTREACH AND ENGAGEMENT INITIATIVE
75. Dancers' Studio West
76. Decidedly Jazz Danceworks
77. Design Talks / d.talks
78. Downstage Theatre
79. Early Music Voices
80. East Side Dance Festival
81. Edmonton Movie Club
82. Elephant Artist Relief
83. EMMEDIA
84. Enchor Choral Society
85. Ethnik Festivals Association
86. Evergreen Theatre
87. Expo Latino
88. Exposure Photography Festival
89. FascinAsian Film Festival
90. Femme Wave
91. Festival of Animated Objects
92. Fire Exit Theatre
93. Fish Creek Concerts
94. Foothills Bluegrass Music Society
95. Foothills Brass
96. Footprints Dance Project
97. Forte Musical Theatre Guild
98. FreeFall Magazine
99. Ghost River Theatre
100. Girls Rock Camp Calgary
101. Glenbow
102. Gli Azzurri
103. GlobalFest
104. Green Fools Theatre
105. Handsome Alice Theatre
106. Harmony Guzheng Ensemble
107. Health Arts Society of Alberta
108. Heritage Weavers and Spinners Guild of Calgary
109. Honens
110. Humainologie
111. Illingworth Kerr Gallery
112. Immigrant Council for Arts Innovation
113. Inside Out Theatre
114. Instrumental Society of Calgary
115. International Avenue Arts and Culture Centre
116. JazzYYC
117. Jeunesse Classique
118. Jupiter Theatre Society
119. Kensington Sinfonia
120. Kinkonauts Artistic Society
121. Kiyooka Ohe Arts Centre
122. Land's End Ensemble

123. League of Extraordinary Albertans
124. Leighton Art Centre
125. Loose Moose Theatre
126. LOUD Art Society
127. Loughheed House
128. Luminous Voices
129. Lunchbox Theatre
130. Morpheus Theatre
131. Mount Royal Choral Association
132. Mount Royal Kantorei
133. Mountain View International Festival of Song & Chamber Music
134. Music Calgary
135. Music Mile Society
136. National accessArts Centre
137. National Music Centre
138. New Works Calgary
139. Old Trout Puppet Workshop
140. One Big Jam
141. One Voice Chorus
142. One Yellow Rabbit
143. Otafest Film & Cultural Festival Planning Committee
144. Prairie Debut Inc.
145. ProArts Society
146. Pumphouse Theatre
147. Quest Theatre
148. Quickdraw Animation
149. Revv52
150. Rocky Mountain Concert Band
151. Sage Theatre
152. Sarb Akal
153. Savridi Singers
154. Seniors Acting Lab Society
155. Silver Stars Musical Revue Society
156. Single Onion
157. Sled Island
158. Southern Alberta Woodworkers Society
159. SpanicArts
160. Spiritus Chamber Choir
161. Springboard Performance
162. Stage Left Productions
163. Storybook Theatre
164. Stride Gallery
165. Studio C
166. Suzirya Ukrainian Dance Theatre
167. Swallow-a-Bicycle Theatre
168. The Bows
169. The Festival Chorus
170. The Grand
171. The New Gallery
172. The Shakespeare Company
173. The Writers' Guild of Alberta
174. Theatre Alberta
175. Theatre Calgary
176. Theatre Encounter
177. Third Action Film Festival
178. Three Left Feet Movement Creations
179. Tribe Artist Society
180. Trickster Theatre
181. Tryzub Ukrainian Dance
182. Venezuelan Canadian Association of Calgary
183. Verb Theatre
184. Vertigo Theatre
185. W\&M Physical Theatre
186. W\.P. Puppet Theatre
187. West Village Theatre
188. Westwinds Music Society
189. Wild Mint Arts
190. Woezo Africa Music & Dance Theatre
191. Wordfest
192. Young Alberta Book Society
193. Youth Singers of Calgary

ABOUT ROOT ECONOMY

Root Economy, founded by Hubba Khatoon, is an independent economic consulting firm based in Calgary, Alberta.

With over 10 years of experience in economic impact analysis and strategic consultation, we provide data-driven insights to support economic development both locally and globally. Root Economy specializes in conducting economic impact assessments and offering strategic advice to businesses, governments, and organizations looking to foster sustainable growth.

Our commitment to evidence-based research helps clients make informed decisions that drive positive economic change.

CONTACT INFORMATION

For any inquiries regarding the findings in this report, or are interested in commissioning another Economic Impact study for a different facility, event, or industry, please reach out to:

Hubba Khatoon

www.rooteconomy.ca

Email: hubba@rooteconomy.ca

Phone: +1 587.969.6079

