

ALIANAIT ARTS FESTIVAL SOCIO-ECONOMIC IMPACT

JULY 2020



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Executive Summary

Alianait is a charitable organization to help build a healthier Nunavut through the arts. It holds the Alianait Arts Festival which takes place in Iqaluit, Nunavut each year in June. With thousands of participants all over the world attending the Festival, Alianait aims to bridge the gap between Inuit and other cultures; and to build a better Nunavut community through art performances, workshops and training. Between March and July of 2020, OMX was retained by Alianait to analyze the social and economic impacts of the Festival, based on its operations in 2018 and 2019.

The following table summarizes the impacts to Gross Domestic Product (GDP) and jobs resulting from the Alianait Arts Festival, including both festival operations and associated tourism spending.

\$22,442,626	\$11,766,988	99
ALIANAIT ARTS FESTIVAL REVENUE and ESTIMATED TOURISM SPENDING	TOTAL IMPACT ON GDP*	JOBS SUSTAINED IN ECONOMY/YEAR*

* Based on Statistics Canada 2015 National Input-Output Multipliers to reflect the impacts of the company's direct operations, the company's supply chain and associated consumer spending. Full-Time Equivalent (FTE) positions defined according to Statistics Canada as the total hours worked divided by average annual hours worked in full-time jobs.

The table below details the components that contribute to Alianait Arts Festival's total impacts.

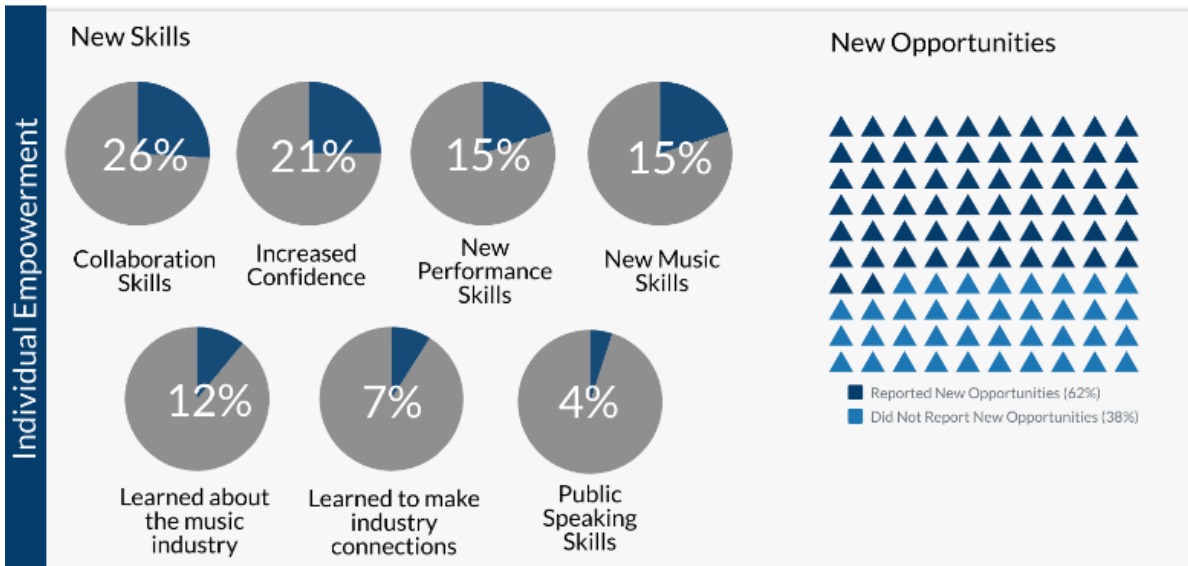
TYPE	AMOUNT	IMPACT ON GDP*	JOBS SUSTAINED/YEAR*
Festival Operations (Revenue) Impacts	\$ 1,960,926	\$2,147,214	20
Additional Estimated Tourism Impacts	\$8,904,450	\$9,619,774	79
Supply Chain Impacts**	\$394,850	\$413,469.01	5

* Based on Statistics Canada 2015 Input-Output Multipliers to reflect the impacts of the company's direct operations, the company's supply chain and associated consumer spending. Full-Time Equivalent (FTE) positions defined according to Statistics Canada as the total hours worked divided by average annual hours worked in full-time jobs. FTE based on annual revenue or spending.

** Supply chain impacts are accounted for in festival operations (revenue) impacts and should not be added together.

Socio-Economic Impact of the Alianait Arts Festival

Alianait is a charitable organization to support arts and culture in Nunavut. It holds the Alianait Arts Festival which takes place in Iqaluit, Nunavut each year in June. With thousands of participants all over the world attending the festival, Alianait aims to bridge the gap between Inuit and other cultures; and to build a better Nunavut community through art performances, workshops and training.



\$11.8M

Impact on GDP * /Year

Total Economic Impact

99

Jobs Sustained /Year **

Community Contributions

100% of festival performers made and kept **new connections** as a result of the festival

On average, **82%** of Festival performers agreed that the Festival contributed to well-being, cultural pride and a sense of community

16,006
Average Festival Attendees in 2018 and 2019



75%
Local Festival Attendees



*Based on Statistics Canada 2015 input-output multipliers to reflect direct, indirect and induced impacts to the economy.
 **Full time equivalent positions based on annual revenue and estimated annual tourism spending.

Powered by **OMX**

Methodology

OMX (theomx.com) is an independent, third-party digital platform utilized to measure, track and report economic impacts from procurement projects and companies by leveraging economic impact multipliers from Statistics Canada.

OMX has established a specific methodology for analytics projects, which includes utilizing supplier data provided by OMX's client. Working with input-output multipliers from Statistics Canada, OMX analyzes supplier contract data and calculates the estimated impact of client activity on the Canadian economy in dollars and jobs. Input-output tables give an overview of how spending in one industry draws upon other industries by purchasing from those industries to meet the change in demand. Applying multipliers derived from the input-output tables allows us to translate an organization's operations into various economic indicators, such as Gross Domestic Product (GDP) and employment. This methodology was designed with feedback from economists, the Data Catalyst Group and Statistics Canada. OMX has previous experience working with organizations in the Canadian territories, specifically Nunavut.

Total impacts from company operations include direct, indirect and induced impacts. Direct impacts include the impacts from the company's operations and individual value add, indirect impacts result from spending with suppliers and induced impacts occur from wages paid to employees which are spent in the economy. OMX's analysis looks at all three factors to give a fulsome picture of the impacts resulting from an activity.

Direct	Impacts on economic output, employment and GDP from increased demand for goods and services causing increased economic activity, not including the purchases sourced from other industries. Referred to throughout this report as "the impacts of the company's operations."
Indirect	Impacts on economic output, employment and GDP due to purchases from other firms or industries needed for the production of final goods and services (ie. steel, chemicals, machinery, other services, etc.) Referred to throughout this report as "the impacts from supply chain."
Induced	Economic impacts from consumer spending resulting from wages paid during direct and indirect production. Referred to throughout this report as "the impacts from associated consumer spending."

In the case of this study, OMX conducted a survey of festival performers in 2018 and 2019 to assess the impacts that the Festival may have had on their lives. The survey was utilized to gather feedback on demographics, performances, workshops provided, as well as new connections, skills, and opportunities that were available to performers as a result of participating in the Festival. The survey response rate was 58% (38 of 66 recipients). Statistics Canada 2015 Input-Output Multipliers were used to estimate the impacts on GDP and jobs.¹

¹ The outputs calculated by OMX, in dollars and jobs, reflect direct, indirect and induced impacts to the Canadian economy.



Festival Economic Impact

This section includes a detailed analysis of the total economic impacts of Alianait's operations including performer data and additional impacts from tourism.

The table below details the total economic impacts from as a result of company revenue in 2018 and 2019.

\$ 1,960,926	\$2,147,214	20
REVENUE	TOTAL IMPACT ON GDP*	JOBS SUSTAINED IN ECONOMY/YEAR**

* Based on Statistics Canada 2015 Input-Output Multipliers to reflect the impacts of the company's direct operations, the company's supply chain and associated consumer spending as a result of contracts awarded.

** Full-Time Equivalent (FTE) positions defined according to Statistics Canada as the total hours worked divided by average annual hours worked in full-time jobs.

The table below details the Festival's yearly economic impact in 2018 and 2019.

TYPE	AMOUNT	IMPACT ON GDP	JOBS SUSTAINED
Revenues 2018	\$ 975,928	\$ 1,068,641	19
Revenues 2019	\$ 984,997	\$ 1,078,572	20

Impacts from Tourism

Since the Alianait Arts Festival draws people to Iqaluit from all over the world, it is important to consider the economic impacts from tourist spending as a result of the Festival. Alianait estimates that 25% of festival attendees are from outside of Iqaluit, which equates to an average of 2,001 tourists to the region per year between 2018 and 2019. Iqaluit Community and Economic Development estimates that tourists to the territory spend an average of \$4,450 per visit. The following details the estimated impacts to Iqaluit based on the number of non-local festival attendees and estimated spending throughout their stay.

\$8,904,450	\$9,619,774	79
TOURISM SPENDING	TOTAL IMPACT ON GDP*	JOBS SUSTAINED IN ECONOMY/YEAR**

* Based on Statistics Canada 2015 Input-Output Multipliers to reflect the impacts of the company's direct operations, the company's supply chain and associated consumer spending as a result of contracts awarded.

** Full-Time Equivalent (FTE) positions defined according to Statistics Canada as the total hours worked divided by average annual hours worked in full-time jobs.

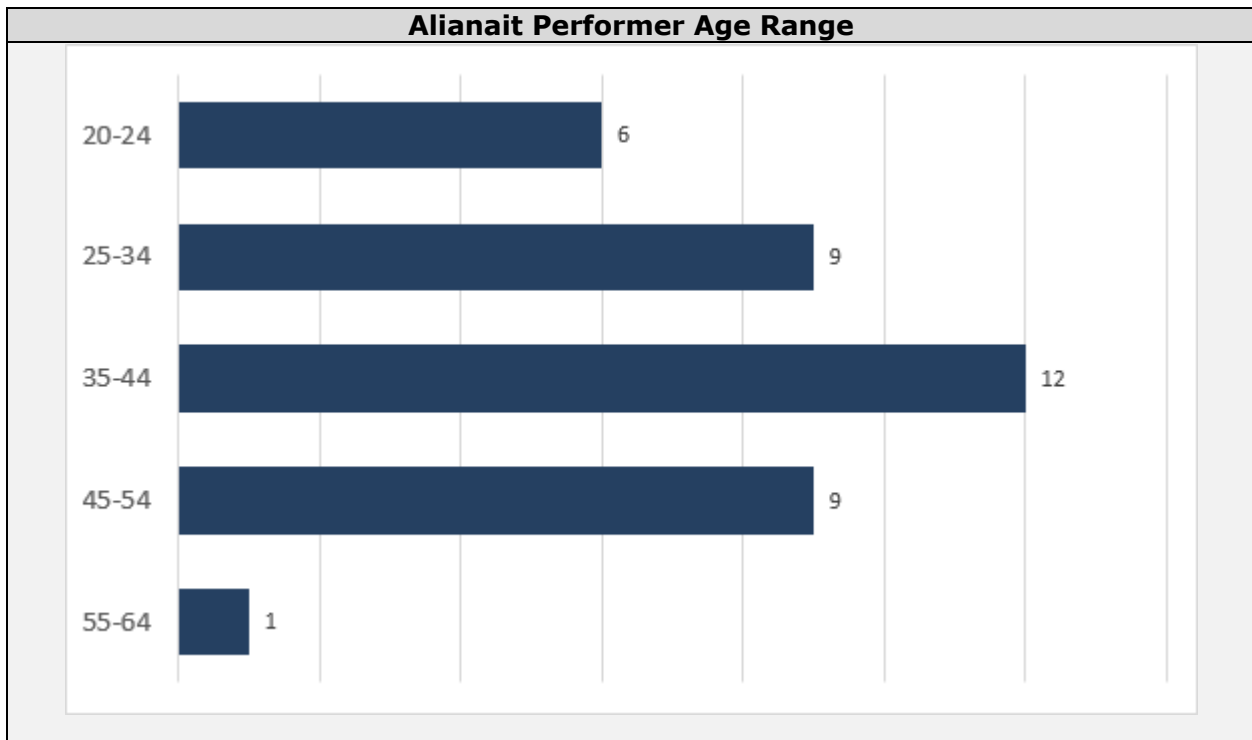
Local Statistics and Initiatives

Alianait plays a large role in the local Inuit community and supports social impacts locally. Some examples are listed below:

- In 2018 and 2019, Alianait supported salaries of \$466,645.
- Among Alianait's 3 full-time staff and 21 part-time staff in 2018, 10 were Inuit; in 2019, among 2 full-time staff and 21 part-time staff, 6 were Inuit.
- Alianait had a total number of 326 performers between 2018 and 2019.
- Alianait's provided workshops to 5,162 people and saw 16,006 festival attendees in 2018 and 2019.
- On average, Alianait performers have performed twice at festivals
- Approximately 75% of Alianait attendees in 2018 and 2019 are locals who live in Iqaluit.

Performer Demographics

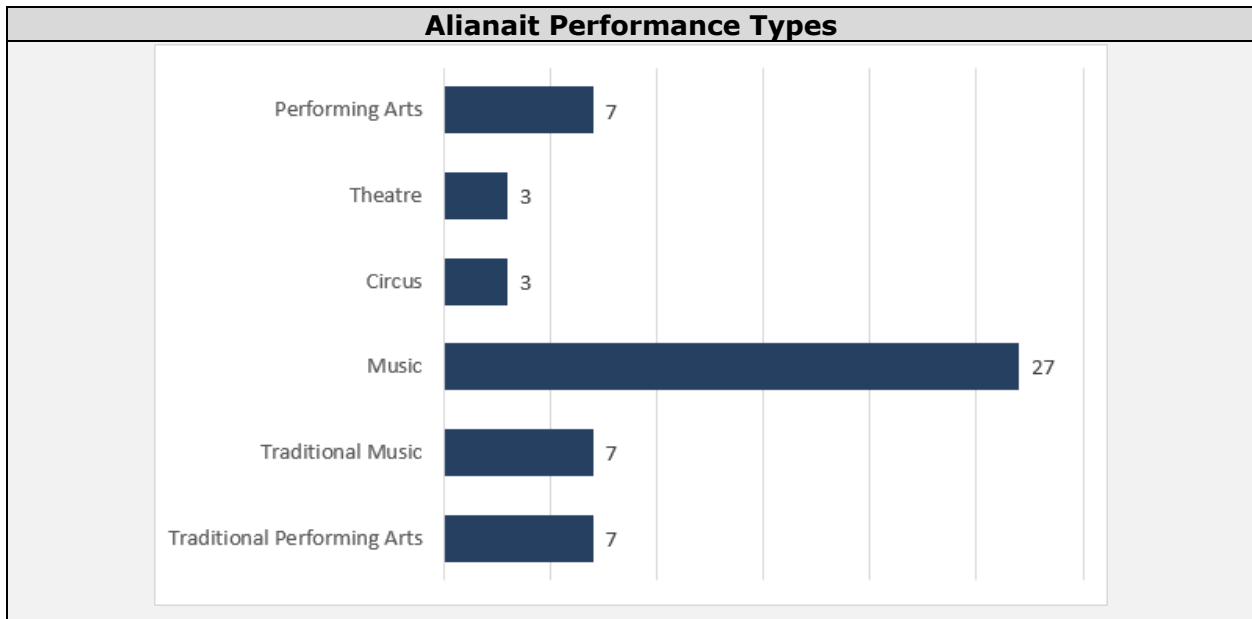
The following details the ages of performers that responded to the survey. 40% of the respondents are below age 35. The young population of performers is reflected by the age demographics in Nunavut, where the average age is 27.7, in comparison to the average age of 41 in Canada.²



² Census Profile, 2016 Census, Statistics Canada, <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/Page.cfm?Lang=E&Geo1=PR&Code1=62&Geo2=&Code2=&Data=Count&SearchText=Nunavut&SearchType=Begin&SearchPR=01&B1=All&GeoLevel=PR&GeoCode=62>

Performance Types

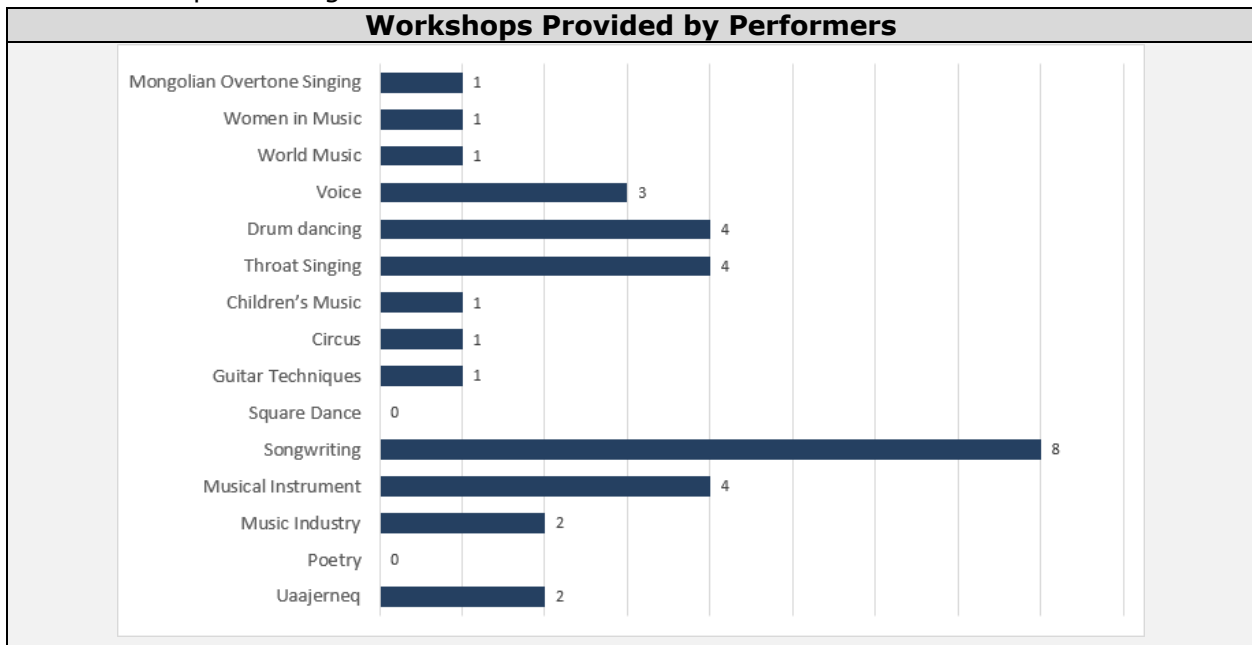
The below outlines the types of performances that were given by survey respondents.



On average, performers performed more than twice at Alianait festival. Other performance types include Inuktitut songs and dances, guitar workshop, music and book reading workshop for children, suicide prevention workshop.

Workshops

The graph below shows the workshops that were provided by performers in 2018 and 2019, in addition to performing at the Arts Festival.



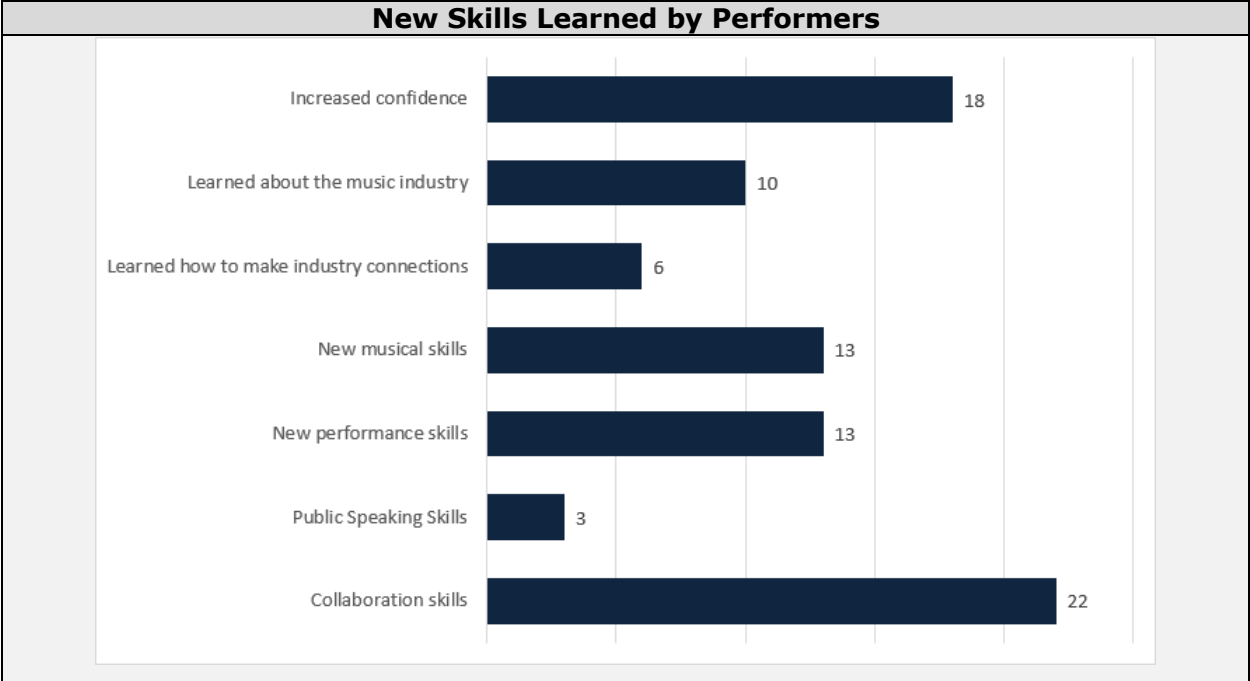
Other workshops that performers participated in include In-the-round Performance, Vocal Empowerment for Non-musicians, Inuktitut Songwriting, Music for Human rights, Suicide Prevention and Bandstand. Of the performers surveyed, no performers provided workshops in Poetry, Square Dance, Children's Music, World Music, Women in Music, Ukulele, Haka and Hoop Dance.

New Connections

All respondents affirmed that they had made new connections as a result of the Alianait Arts Festival.

New Skills

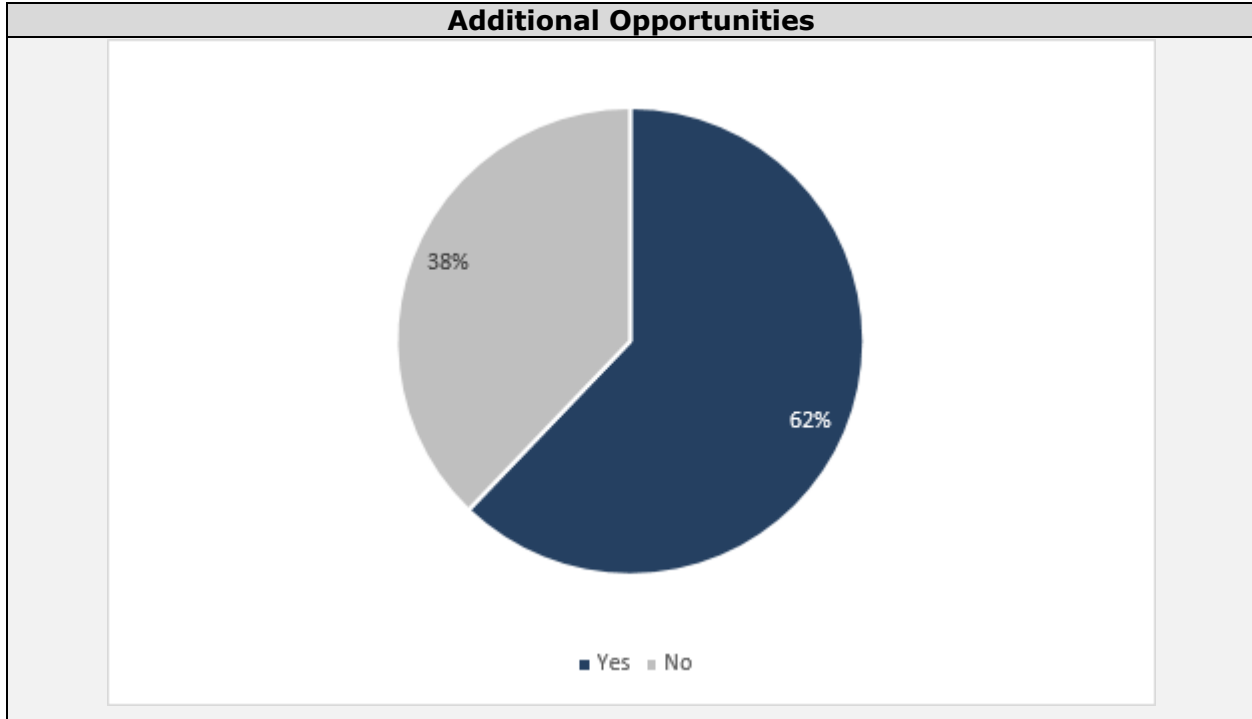
Performers continue to gain new skills as a result of performing at the Alianait Arts Festival. 84% of performers in 2018 and 2019 report learning new skills with the most performers reporting gaining collaboration skills and increased confidence.



Other skills performers have learned from the Alianait Festival include Inuktitut language skill, social skills with local Iqaluit people, gained insights about Nunavut cultural scene, northern and indigenous music.

Additional Opportunities

The following illustrates additional opportunities that performers have been given access to as a result of performing at the Alianait Arts Festival. Opportunities include musical and other opportunities such as jobs.



The performers surveyed provided positive feedback on the Festival. Of the performers surveyed, many of them attributed the stage that the Alianait Arts Festival provided, to increased confidence performing in front of foreign audiences, and new performance opportunities in other festivals and events. Through network building at the Alianait Arts Festival, performers were able to connect and collaborate with other artists, join a band or artist residence program, and move to Iqaluit to work. On the other hand, other performers, inspired by the Festival, decided to pursue a degree in their field.

Contributions to Well-being

Based on a scale of 1 to 5 from lowest to highest, 78% of respondents agreed or strongly agreed that the Festival contributes to their physical, emotional and psychological wellbeing. No respondents reported a negative result and 22% provided a neutral response.

Cultural Pride

Based on a scale of 1 to 5 from lowest to highest, 81% of respondents agreed or strongly agreed that the Festival increased cultural pride in their community. 11% of respondents reported a neutral response.

Sense of Community

Based on a scale of 1 to 5 from lowest to highest, 86% of respondents agreed or strongly agreed that the Festival created a shared sense of community. 11% of respondents reported a neutral response.

Individual Experiences

The following illustrates the impacts of the Alianait Arts Festival, based on the experiences of festival performers.

Alianait is the only cultural bridge between Canada and Greenland and is essential for our connection as Inuit. Not just the charter (flight between Nunavut and Greenland organized by Alianait), but the people are connecting.

- Vivi Sørensen

I looked forward to the time of year Alianait's top tent would arise. I knew that it meant I would soon be surrounded by an amazing assemble of artists, youth, and people of Iqaluit. Alianait is very enlightening, and the 24/hour daylight makes it a never-ending four days of celebration. Though it is very tiresome, some of my most enjoyable memories happened during that time. My experience with Alianait is not very long, but I am thankful to be a part of it, and I am excited to see what's to come.

- Tooma Laisa

Alianait festival creates so many opportunities for artists, especially the ones starting out for the first time as I was. For my community, I had inspired so many young people to go out there and be themselves artistically. For Nunavut, Alianait has made a huge impact, and I believe it helps young people to look forward to something, reducing the percentage of suicide that way. Alianait is a really good annual festival for Inuit. Thanks to the founder Heather Daley for creating such an amazing thing for Nunavut.

- Letia Kalluk

Alianait throws a ray of hope in Nunavut. The community comes alive as Alianait provides shows for everyone. It gives people access to musicians and artists we would otherwise never see. To me, Alianait means unity; it means healing; it means opportunity. It has given me a voice as a minority. I feel seen and heard. Alianait creates employment and contributes to community development.

- Francisca Mandeya

Being from a smaller community in Nunavut, it was hard to feel like a part of the Inuit community in Iqaluit (due to difference in dialect and not knowing locals yet). I moved to Iqaluit 10 years ago, and one of the first times where I really felt like a part of the community was when I would attend the Alianait festival.

- Aviaq Johnston

Good supporter for musicians around the North, Canada, and around the world to get opportunities to share and promote their music or talent on the Nunavut stage.

- Daniel Taukie

The Alianait Art Festival believed in me as an artist and has jump-started my artist career by giving me my first show and giving me opportunities to perform with other artists. Life-changing.

- Colleen Nakashuk

I absolutely loved my time in Iqaluit. It was a great opportunity to share my stories and songs and to share in a beautiful place that I would never have otherwise been able to visit on my own. I made so many connections with residents, community members and artists and have continued to meet up with and stay in contact with those people after the Festival.

- Brooklyn Doran

For me, it has been an opportunity to grow as a musician, come in contact with new types of music, reconnect with some older music, meet and collaborate with new musicians from around the globe. It is all positive results for the community; sharing, listening, learning and communicating.

- Jeff Peacock

Alianait is a big inspiration and a great place to network. I love how the program takes place at different locations in Iqaluit.

- Camilla Høg

Supply Chain Economic Impact

The below analysis details the total economic impacts across Canada, including the total impacts to GDP and the jobs sustained by contracts awarded. The table below details the total economic impacts from contracts awarded in 2019.

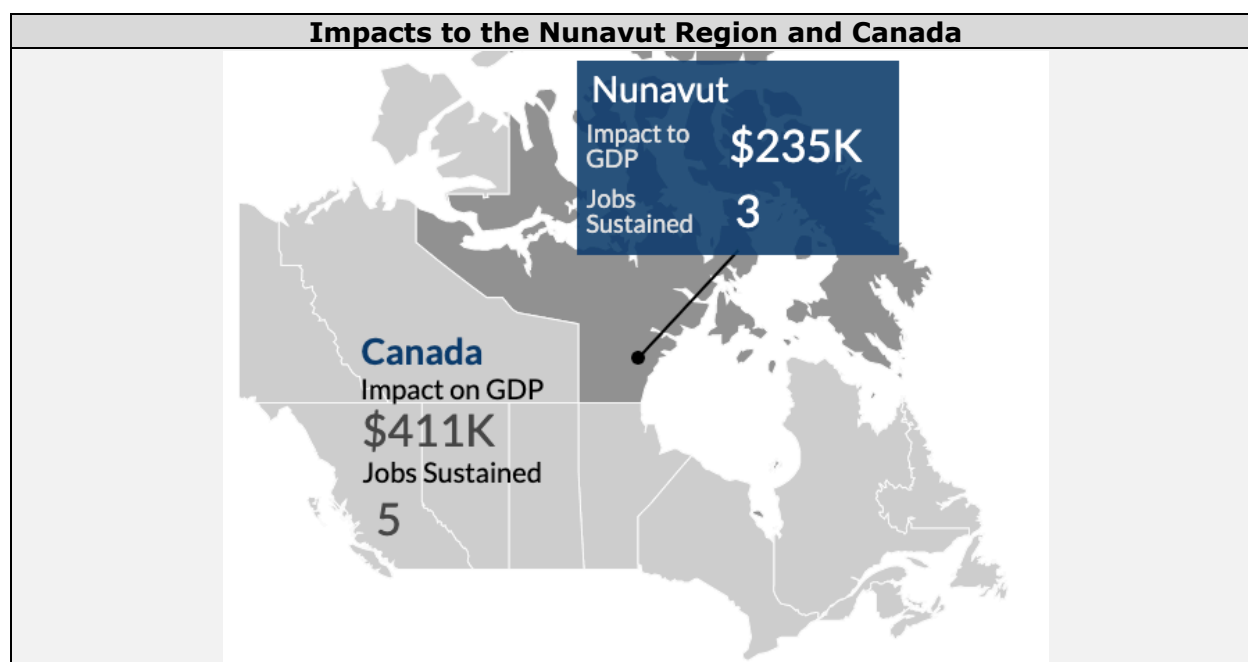
\$394,850	\$413,469	5
CONTRACTS AWARDED	TOTAL IMPACT ON GDP*	JOBS SUSTAINED IN ECONOMY**

* Based on Statistics Canada 2015 Input-Output Multipliers to reflect the impacts of the company's direct operations, the company's supply chain and associated consumer spending as a result of contracts awarded.

** Full-Time Equivalent (FTE) positions defined according to Statistics Canada as the total hours worked divided by average annual hours worked in full-time jobs.

Impacts to Nunavut and Canada

Alianait works with a significant number of local suppliers in the Nunavut region. The company spends 57% of its total Canadian supply chain sourcing locally. The following graphic highlights the impacts from Alianait's supply chain activities in the Nunavut region in comparison to the impacts created nation-wide.

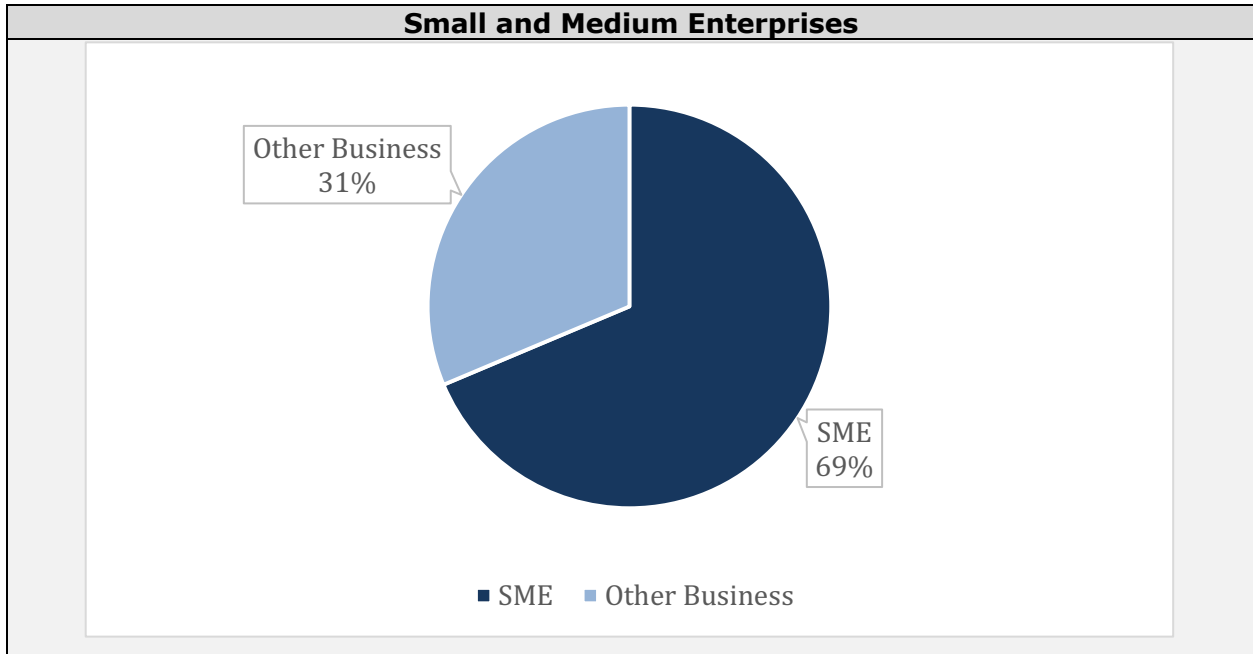


The majority of Alianait's supply chain spending occurs locally within Nunavut. The table below details the total impacts from Alianait's spending with suppliers in the Iqaluit and Nunavut.

REGION	AMOUNT	IMPACT ON GDP	JOBS SUSTAINED
Iqaluit Region	\$ 203,063	\$ 232,476	3
Total Nunavut	\$ 204, 898	\$ 234,532	3
Total Canada	\$ 392,062	\$ 410,727	5

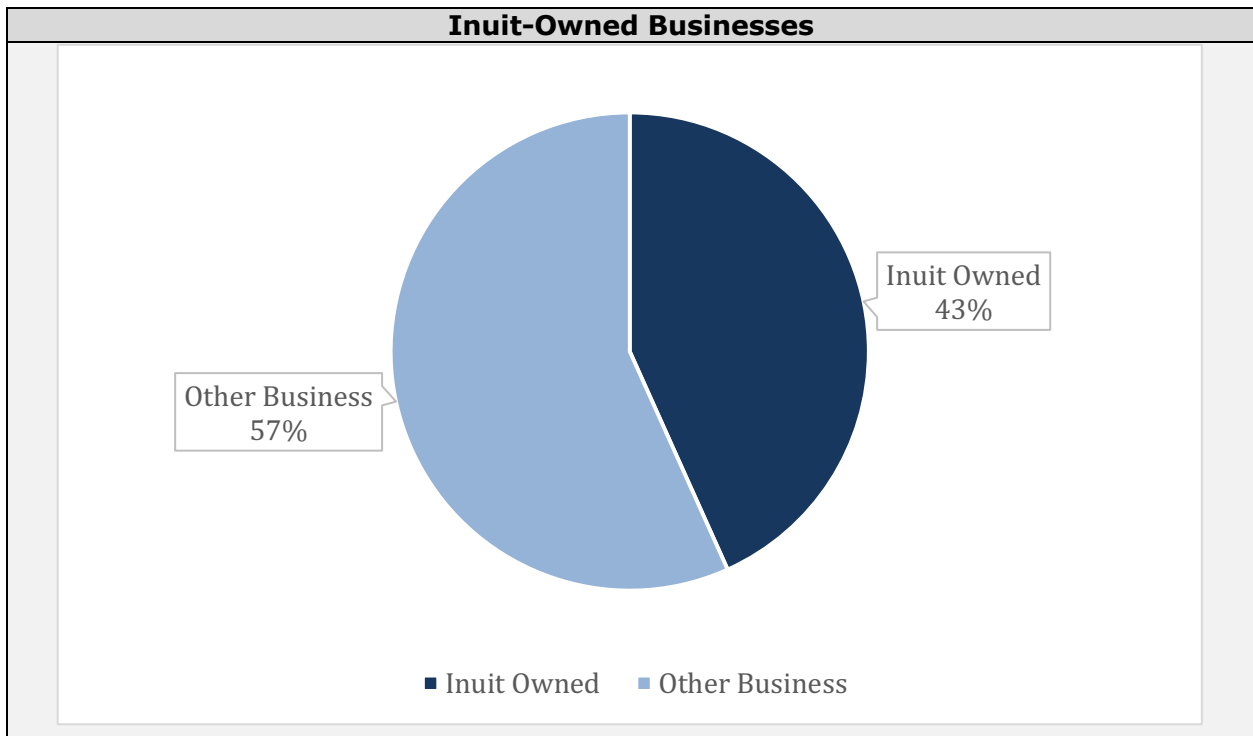
Small and Medium Enterprises (SMEs)

The majority of Alianait's supply chain are SMEs. OMX's findings show that 69% of companies that supplied to the Festival are small businesses.



Inuit-Owned Suppliers

Based on OMX's supplier analysis, 43% of suppliers that were awarded contracts by the Alianait Arts Festival were Inuit-owned businesses.

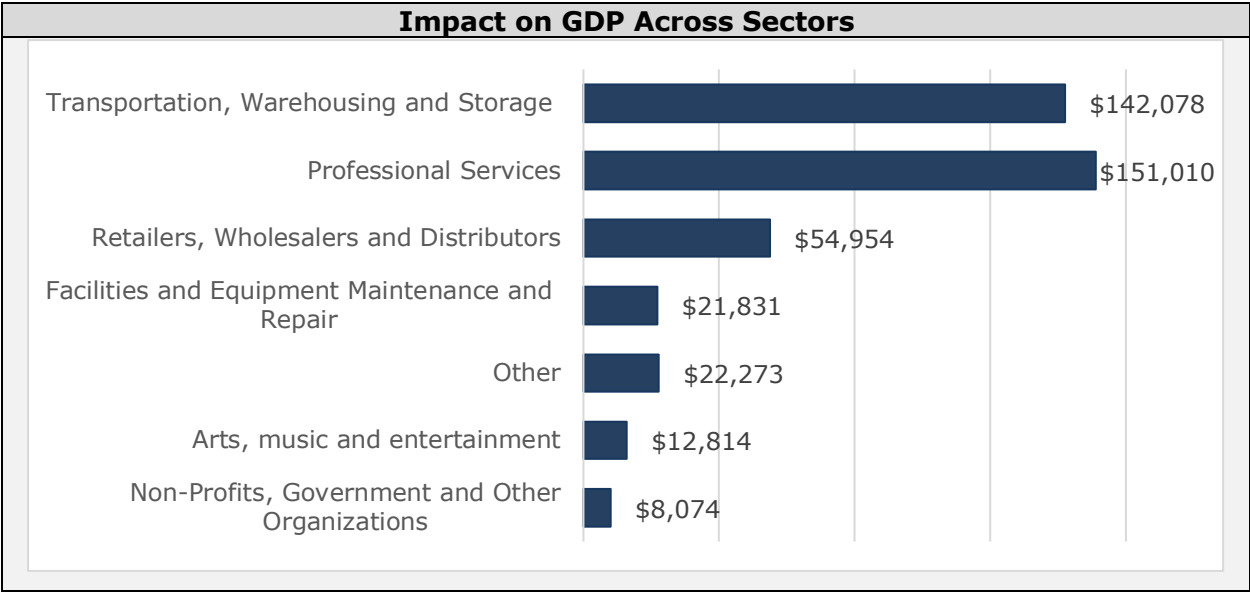


Economic Impact Across Sectors

The following section details the economic impacts on GDP and jobs across sectors.

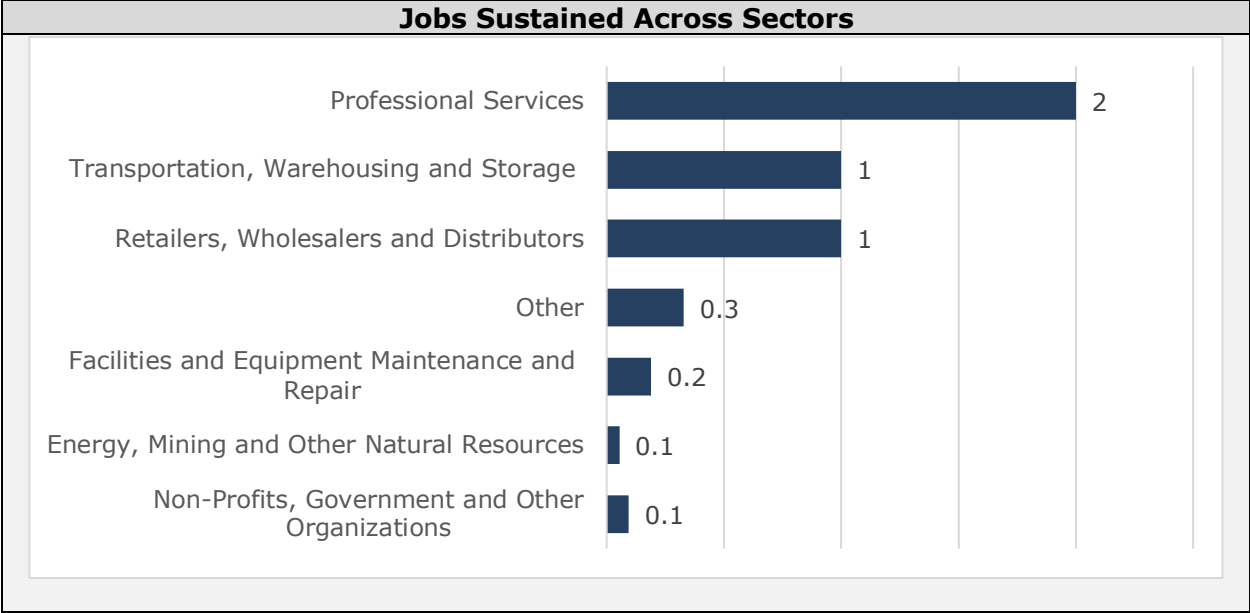
Impact on GDP

The below graph details the impact on GDP across sectors, based on the activities of contracts awarded.



Jobs Sustained

The following graph details the jobs sustained across sectors as a result of contracts awarded.



Appendix I: Glossary

TERM	DEFINITION
Gross Domestic Product (GDP)	Gross Domestic Product (GDP) measures the value of final goods and services produced within an economy within a certain period.
Economic Output	Economic output is a measure of the total economic activity occurring within a given period and refers to the total value of all goods and services produced within an economy within that period.
Jobs	The annual FTE jobs sustained within the economy resulting from company operations, supply chain, and associated consumer spending.
Full Time Equivalent (FTE)	Full-Time Equivalent (FTE) positions defined as the total hours worked divided by average annual hours worked in full-time jobs.
Direct Effects	Impacts on economic output, employment and GDP from generating goods and services and their own value-added beyond the material inputs/purchases that they sourced from other industries. Referred to throughout this report as "the impacts of the company's direct operations."
Indirect Effects	Impacts on economic output, employment and GDP due to purchases and other firms/industries providing the goods needed for the production of goods and services (ie. steel, chemicals, machinery, other services, etc.) Referred to throughout this report as "the impacts from supply chain."
Induced Effects	Economic impacts resulting from consumer spending induced by labour incomes derived from production under the aforementioned direct and indirect industrial activity. Referred to throughout this report as "the impacts from associated consumer spending."

OMX