



GLAM STUDY TOOLKIT

Practical tips and tools for using the results
of the Study of the GLAM (galleries, libraries,
archives and museums) sector

Developed by the Canadian Museums Association,
with the support of Library and Archives Canada



CANADIAN
MUSEUMS
ASSOCIATION

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INTRODUCTION

Canada gains nearly \$8.6 billion a year in economic benefits, in addition to a myriad of social advantages, from the existence of non-profit galleries, libraries, archives and museums (GLAMs), according to a [study conducted by Oxford Economics](#) and commissioned by the Ottawa Declaration Working Group; a consortium of stakeholders co-led by the Canadian Museums Association (CMA) and Library and Archives Canada (LAC). The findings were made public in May 2020. It was the first time that a study of this scope — covering the entire GLAM sector — has been conducted in Canada.

Thanks to support from LAC, the CMA has developed this toolkit which contains both tips and tools to help a wide range of professionals and institutions across the GLAM sector make further use of the findings.

Please note that the GLAM Study Toolkit is best accessed online (<https://bit.ly/GLAMs>). There you will find links to download all of the elements, including infographics, a presentation package, social media graphics and more.

We encourage members of the GLAM community to read the study and help get the word out!

GLAM STUDY TOP TIPS

Designed to support and amplify the launch of the GLAM report, here are some ideas on how to share the results with stakeholders:

1. Share #GLAMFacts on social media

Amplify the GLAM report results within your local network. Using the social content included in this toolkit, share GLAM results on your social media pages. The toolkit contains visuals, text for your posts and a link to a landing page where interested audiences can learn more and read the full report. Your regular posting and consistency in messaging will help reinforce the findings. And remember to use the #GLAMFacts hashtag! If possible, consider tagging your local MP (You can locate your local MP here: <https://www.ourcommons.ca/members/en>).

2. Speaking opportunities

Consider exploring relevant industry events across the sectors (e.g. Ontario Library Association Super Conference, Conference of the Association of Canadian Archivists, etc.) that are looking for speakers and apply to present on the topic of the value of the GLAM sector. This will help further amplify the results of the report to a wider audience of stakeholders.

3. Presenting study findings to staff and your board

Consider your staff and board members as ambassadors. If you haven't already, it would be worth organizing a virtual meeting with these groups to share the findings of the report. The benefit of sharing with your internal audiences is to help educate them on the report findings and they may wish to help by sharing through their personal social media accounts and via their networks.

4. Place infographics at your GLAM's entrance

Print large scale versions of the sector specific infographics included in this toolkit and consider placing them on an easel at the entrance or high-traffic areas of GLAMs. Having a highly visual representation of the report findings in an easily digestible format will help to further educate your visitors about the sector.

5. Host a webinar

To further promote the GLAM study, record a webinar that features the findings from different perspectives. Select a theme for each video, post it on YouTube (don't forget the hashtag!) and make available through your website so that it can continue to be a reference point and accessible across the network. It could also include a Live Webinar where industry leaders are interviewed, and a Q&A takes place at the end. The videos should be limited to 2 minutes and can be recorded on your laptop.

6. Add GLAM to your website

Based on the key messages included in this toolkit, we recommend creating a landing page on your website linking to the [GLAM study homepage](#), where a report PDF can be downloaded in full, along with the infographic, social shareables and other assets. Tell your audience why GLAMs matter with compelling statements that lead readers to click and download the full document. You can find a website copy to incorporate [here](#).

7. Targeted outreach with local leaders

Set up meetings with key Members of Parliament (MPs) and Senators from your region or with whom you have a connection to let them know about the value of GLAMs. This can be facilitated as one-on-one meetings or through regional/all-party caucuses, either virtually or in-person. In your area, we also recommend reaching out to your local MP and setting up a meeting or call to discuss the report using the key messages provided and sharing the [one-page leave behind](#) included in this toolkit.

How to reach out:

- Call your local Member of Parliament and set up a call or meeting. *You can local your local MP here:* <https://www.ourcommons.ca/members/en>
- Print off and bring the GLAM one-pager or share via email attached to your request.
- Remember to take a picture after your meeting and post on social media, tag your local MP on Facebook or Twitter.

8. Use the toolkit fact sheet when fundraising

The toolkit fact sheet is handy document to help you make a solid case for support from donors, funders, sponsors. Get familiar with its contents and use it when you're meeting with potential funders and donors. The findings show why investing in GLAMs makes a lot of sense, so leverage this information with those audiences.

9. Show and tell videos

Produce short, simple videos that showcase GLAMs across Canada, with key individuals telling your audience why GLAMs matter, and highlighting 1-2 key data points from the report. This experience will bring the data to life and feature a diversity of voices from across Canada. Produce 30-60 second clips, select a key message to highlight and show in action.

Feature employees from GLAMs across Canada or you can give a young student or volunteer or local influencer exclusive access to explore their favorite section of your GLAM. Provide each individual with #GLAMFacts and consider voices that represent the key pillars of the report: Education, Research, Artistic Creation and Communities. An example script could be something like this: "Hi, I'm [insert name and title] and I believe galleries, libraries, archives, and museums play a vital role in Canadian society.

Did you know [insert #GLAMFacts]? With over 150-million visits to GLAMs every year in Canada it's clear we need to ensure they're adequately funded and supported to ensure their financial health and community viability for years to come. For more information on the value of GLAMs please visit <https://bit.ly/GLAMs>. Share your videos on relevant social media channels and use the #GLAMFacts hashtag.

Never made a social video? Within the online version of this toolkit we include a hyperlink to some smart phone video instructions. [Here are some smart phone video instructions](#).

10. Media relations

Does your organization ever get calls from the media? Do you know the reporters in your community? Do you ever reach out to the media, either by phone or via a letter to the editor or op-ed, to share your views on an issue related to the sector or your specific institution? In any of these situations, use the concrete findings of the study to bolster your argument. When an opportunity arises, reach out to them about the importance of your GLAM and include the Fact Sheet included in this toolkit.

11. Include GLAM facts in your funding applications

When applying for funding, use GLAM facts as a way of demonstrating the value of your institution. Augmenting the value of your application, including GLAM Study facts will also spread the word on the value of GLAMs with individuals working in key funding positions and on important assessment juries.

12. Leverage existing awareness events

Try using relevant sector awareness days, weeks and months as a hook to make an extra push – for meetings, media activities, social media outreach, etc. ICOM International Museum Day and MuseumWeek are both in May, International Archives Day and Week occur in June, and Canadian Library Month is October.

GLAM STUDY KEY MESSAGES

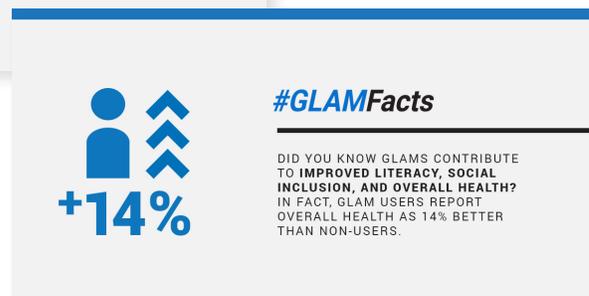
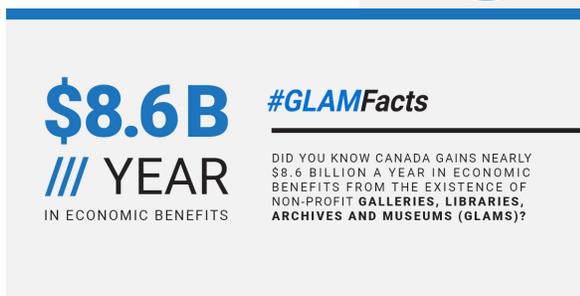
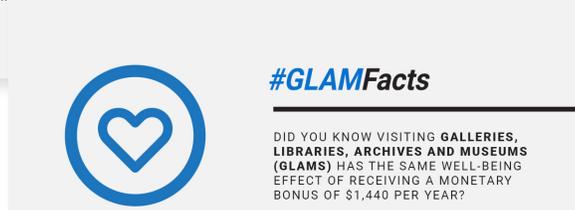
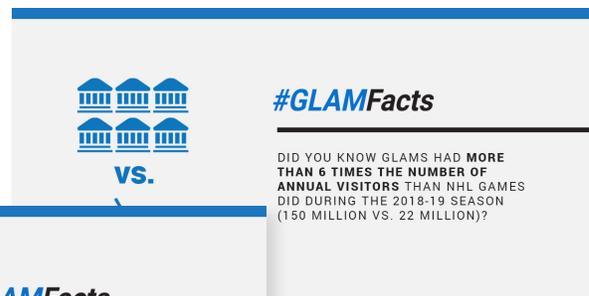
The key messages produced for this toolkit are the backbone to all of the tips and activities aimed at increasing awareness of the GLAM findings. Below, you will find general key messages. The complete key messages document is available in the *Toolkit Resources* section of this PDF document and on our [website for download](#). There, you will also find sector specific key messages, and also useful information on how the GLAM sector compares to other sectors and some regional data.

- To capture the value of galleries, libraries, archives, and museums (GLAMs), a national survey of 2,045 Canadian residents was conducted and the results were released in December 2019.
- The study was commissioned by the Ottawa Declaration Working Group; a consortium of stakeholders co-led by the Canadian Museums Association (CMA) and Library and Archives Canada (LAC).
- The study was conducted by Oxford Economics. The results showcase the incredible value and pride Canadians place in GLAMs. These institutions play a vital role in Canadian society.
- A key finding of this study is that users of these institutions would be willing to spend a total of \$4 billion more per year out of their own collective pocket to access them if required — a testament to just how much they value GLAMs. In fact, 96% of respondents surveyed for the study said that museums contribute to our quality of life.
- The value of GLAMs is strong even with those Canadians who don't visit them.
- When non-visitors over the past 12 months were asked the maximum amount they would pay each year as a donation to maintain all of Canada's non-profit GLAMs they stated they would support \$22 per year for museums, \$17 for galleries and libraries, and \$14 for archives - this represents an estimated \$2.2 billion.
- GLAM visits are associated with a number of important societal benefits including greater literacy, curiosity, innovation, knowledge and creativity, increased rates of volunteerism and a better sense of community.
- GLAMs contribute positively to overall health. In fact, GLAM users report overall health as 14% better than non-users.
- Canadians visit GLAMs in large numbers annually. In fact, GLAMs welcomed more than six times the annual visitors than National Hockey League games did during the 2018-19 season (150 million vs. 22 million visitors).

SOCIAL POSTS

See [GLAM Study Top Tips #1](#). Social media posts have been created in graphic form for you to [download and share](#). Remember to hyperlink to the [study](#) and to make use the #GLAMFacts hashtag!

- Did you know Canada gains nearly \$8.6 billion a year in economic benefits from the existence of non-profit galleries, libraries, archives and museums (GLAMs)? It's true: bit.ly/GLAMs #GLAMFacts
- Did you know for every dollar invested in galleries, libraries, archives and museums (GLAMs), Canadian society gets nearly four dollars in benefits? It's true: bit.ly/GLAMs #GLAMFacts
- Did you know visiting galleries, libraries, archives and museums (GLAMs) has the same well-being effect of receiving a monetary bonus of \$1,440 per year? It's true: bit.ly/GLAMs #GLAMFacts
- Did you know GLAMs contribute to improved literacy, social inclusion and overall health? GLAM users report overall health as 14% better than non-users. It's true: bit.ly/GLAMs #GLAMFacts
- Did you know GLAMs had more than 6 times the number of annual visitors than NHL games did during the 2018-19 season (150 million vs. 22 million)? It's true: bit.ly/GLAMs #GLAMFacts



INFOGRAPHICS

We have developed general, as well as sector-specific, infographics to distill and present the study findings in an eye-catching way. The infographics below are available for download within the [online version of this toolkit](#). They are also available in full size in the *Toolkit Resources* section of this document.

GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS ARE OTHERWISE KNOWN AS THE GLAM SECTOR

VALUE OF GLAMS IN CANADA

Based on the study conducted by Oxford Economics using metrics commonly employed by cultural institutions, as well as the results of a national survey of more than 2,000 Canadians

- \$8.6 BILLION/YEAR** GAINS IN ECONOMIC BENEFITS
- \$1,440 A YEAR** VALUE OF IMPROVED HEALTH AND WELL-BEING
- \$3.1 BILLION/YEAR** VALUE OF EDUCATIONAL BENEFITS
- \$1.6 BILLION/YEAR** VALUE OF ONLINE VISITS OF THE SECTOR
- 150 MILLION/YEAR** VISITS TO CANADIAN GLAMS
- GLAM USERS REPORT OVERALL HEALTH AS 14% BETTER THAN NON-USERS
- FOR EVERY DOLLAR INVESTED IN GLAMS, SOCIETY GETS NEARLY FOUR DOLLARS IN BENEFITS
- WILLING TO INVEST **+\$4 BILLION/YEAR**
- PREPARED TO CONTRIBUTE **\$2.2 BILLION/YEAR**

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS ARE OTHERWISE KNOWN AS THE GLAM SECTOR

VALUE OF GALLERIES IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that galleries contribute millions to the Canadian economy and societal well-being.

- \$1.6B /// YEAR** IN ECONOMIC BENEFITS
- \$435M** VALUE OF EDUCATIONAL BENEFITS
- \$378M /// YEAR** VALUE OF GALLERIES ONLINE VISITS
- 35%** HIGHER PROBABILITY OF REPORTING VERY GOOD/EXCELLENT HEALTH THAN NON-VISITORS
- FOR EVERY DOLLAR INVESTED IN GALLERIES, SOCIETY GETS NEARLY **FOUR DOLLARS** IN BENEFITS
- WILLING TO INVEST +\$615M /// YEAR**
- PREPARED TO CONTRIBUTE +\$536M /// YEAR**

GLAM USER: GALLERY USER | GLAM NON-USER: GALLERY NON-USER

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS ARE OTHERWISE KNOWN AS THE GLAM SECTOR

VALUE OF MUSEUMS IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that museums contribute millions to the Canadian economy and societal well-being.

- \$2.9B /// YEAR** IN ECONOMIC BENEFITS
- \$1.2B /// YEAR** VALUE OF EDUCATIONAL BENEFITS
- \$277M /// YEAR** VALUE OF MUSEUMS ONLINE VISITS
- 30M /// YEAR** VISITS TO MUSEUMS
- 96%** OF CANADIANS BELIEVE MUSEUMS CONTRIBUTE TO OUR QUALITY OF LIFE
- FOR EVERY DOLLAR INVESTED IN MUSEUMS, SOCIETY GETS NEARLY **FOUR DOLLARS** IN BENEFITS
- PREPARED TO CONTRIBUTE +\$693M /// YEAR**

GLAM USER: MUSEUMS USER | GLAM NON-USER: MUSEUMS NON-USER

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF GLAMS (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS ARE OTHERWISE KNOWN AS THE GLAM SECTOR

VALUE OF LIBRARIES IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that libraries contribute millions to the Canadian economy and societal well-being.

- \$3.4B /// YEAR** IN ECONOMIC BENEFITS
- \$1.3B /// YEAR** VALUE OF EDUCATIONAL BENEFITS
- \$636M /// YEAR** VALUE OF LIBRARIES ONLINE VISITS
- 100M /// YEAR** VISITS TO LIBRARIES
- FOR EVERY DOLLAR INVESTED IN LIBRARIES, SOCIETY GETS NEARLY **FOUR DOLLARS** IN BENEFITS
- WILLING TO INVEST +\$1.7B /// YEAR**
- PREPARED TO CONTRIBUTE +\$537M /// YEAR**

GLAM USER: LIBRARY USER | GLAM NON-USER: LIBRARY NON-USER

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS ARE OTHERWISE KNOWN AS THE GLAM SECTOR

VALUE OF ARCHIVES IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that archives contribute millions to the Canadian economy and societal well-being.

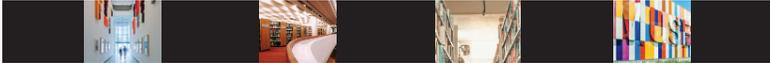
- \$652M /// YEAR** IN ECONOMIC BENEFITS
- \$41M /// YEAR** VALUE OF EDUCATIONAL BENEFITS
- \$353M /// YEAR** VALUE OF ARCHIVES ONLINE VISITS
- FOR EVERY DOLLAR INVESTED IN ARCHIVES, SOCIETY GETS NEARLY **THREE DOLLARS** IN BENEFITS
- WILLING TO INVEST +\$185M /// YEAR**
- PREPARED TO CONTRIBUTE +\$446M /// YEAR**

GLAM USER: ARCHIVES USER | GLAM NON-USER: ARCHIVES NON-USER

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF GLAMS (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

FACT SHEET

In support of the activities highlighted in tips 6 and 7, for example the website content and meetings with influencers, we have developed an at-a-glance fact sheet that features key messages and graphics. The *Fact Sheet* below is available for download within the online version of this toolkit and appears in full size further in this document.



GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS PLAY VITAL ROLE IN CANADIAN SOCIETY

Across Canada, our culture and the way we experience culture is constantly evolving and plays an important role in our identity, creativity, knowledge and memories, giving us unique insights into our past and present. Local galleries, libraries, archives and museums (GLAMs) are key fixtures of our communities that profoundly help enrich and in turn, shape our lives.

From school visits to local museums as children to first dates visiting national galleries with world-renowned painting and sculptures, Canadians across the country have experienced GLAMs throughout their lives. However, there is consistently a lack of understanding and expressed value around their larger significance in our country.

The GLAM community wanted to better understand how their value could be expressed not only within their individual communities but across Canada. In late 2018, the Ottawa Declaration Working Group, a consortium of stakeholders co-led by the Canadian Museums Association (CMA) and Library and Archives Canada (LAC), commissioned a national study with Oxford Economics to better understand their value in Canada. The results showcase the incredible value and pride Canadians place in GLAMs, the vital role that institutions play in communities and their contribution to economic prosperity in Canada.

Key findings from Value Study of GLAMs in Canada:

- Canadians visit GLAMs in large numbers, with **over 150 million visits** every year and play an important role in preserving and promoting Canadian heritage through access to resources for education, research, learning and artistic creation. This in turn has generated nearly **\$8.6 billion a year in economic benefits** for Canada, in addition to a myriad of social advantages. This is comparable to the Canadian wine & grape industry (\$9.04 billion) and general aviation industry (\$9.3 billion).
- For every dollar invested in Galleries, Libraries, Archives, and Museums, Canadian society gets nearly four dollars in benefits** – a return that is on par with government investments in transportation infrastructure projects.
- The value of **online visits to GLAM official websites, catalogues and social media pages is \$1.6 billion per year, and this was before the COVID-19 pandemic**, during which time more museums than ever before have been offering virtual options for the public to engage with their collections.
- GLAM visits are associated with a number of other important societal benefits including **greater literacy, curiosity, innovation, knowledge and creativity, increased rates of volunteerism and a better sense of community.**
- GLAMs contribute positively to overall health. In fact, **GLAM users report overall health as 14% better than non-users.**
- The GLAM sector feeds the economy and innovation while being an integral part of the fabric of our nation, benefiting Canadians of all ages, backgrounds and regions. The annual value to an average GLAM user is equivalent to \$1,440 in improved wellbeing (as measured through health effects). **In other words, visiting GLAMs has the same wellbeing effect of receiving a monetary bonus of \$1,440 per year.**
- GLAMs generate significant **educational benefits** for Canada, including through school visits which provide children across the country with important learning opportunities. The value of these visits is estimated at **\$3.1 billion.**

The economic and social benefits are immense and now, more than ever, is a critical time to ensure that galleries, libraries, archives and museums are adequately funded and supported to ensure their financial health and community viability.

PRESENTATION PACKAGE

This toolkit includes an easy-to-use presentation package, which you can easily [download from the online version](#). It includes PowerPoint slides (see below) which you can use on their own or add to another presentation, as well as some suggested speaking points. The presentation package includes slides and notes related to the findings for the full GLAM sector, but we have also included a slide on each of the sub-sectors, in case you are presenting to a particular group and you want to drill down. You can keep, remove or customize each of these individual slides, depending on your preference.

This package can be useful for many of the tips and activities highlighted above, including the speaking opportunities, webinars, meetings and even discussions with your staff.

THE VALUE OF GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS (GLAMS) IN CANADA

HIGHLIGHTS FROM THE DECEMBER 2019 VALUE STUDY OF GLAMS IN CANADA

BACKGROUND

KEY FINDINGS BY THE NUMBERS

- ▶ 150 million annual visits
- ▶ \$8.6 billion a year in economic benefits
- ▶ For every dollar invested in GLAMs Canadian Society gets nearly four in benefits

BENEFITS OF GLAMS

- ▶ Greater literacy, curiosity, innovation, knowledge and creativity
- ▶ Improved overall health and well-being
- ▶ Better sense of community

INDUSTRY COMPARISONS

- ▶ More annual visitors than the CFL, NHL, and MLB
- ▶ Larger than the wine and grape industry in Canada

REGIONAL BREAKDOWN OF STUDY

All respondents (\$Millions to Pay, per year)

Province/Territory	Galleries	Libraries	Archives	Museums	GLAMs
Alberta	17	26	19	12	263
British Columbia	24	29	19	23	341
Manitoba	20	21	13	10	163
Ontario	11	21	20	21	114
Quebec	10	10	10	10	10
Atlantic	10	10	10	10	10
Yukon	1	1	1	1	1
National	22	29	18	28	31

Note: All results are based on a national survey. Results may vary slightly by region. (i.e. less than 10 respondents, 100 Results are not as reliable as those with more than 100 respondents.)

▶ Regional results related to users and non-users willingness to pay for GLAMs

KEY BENEFITS OF GALLERIES

- ▶ Good for your health
- ▶ Higher probability of volunteerism
- ▶ Economic and educational benefits

KEY BENEFITS OF LIBRARIES

- ▶ Access to resources to research, learn and engage
- ▶ Neighbourhood hubs that promote community support and inclusion
- ▶ Economic and educational benefits

KEY BENEFITS OF ARCHIVES

- ▶ Fundamental role of providing evidence of past activities
- ▶ Preservation of vital records
- ▶ Economic and educational benefits

KEY BENEFITS OF MUSEUMS

- ▶ Create a sense of community and belonging
- ▶ Educate, inspire, and contribute to our overall quality of life
- ▶ Economic and educational benefits

THANK YOU

ADDITIONAL INFORMATION

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TOOLKIT RESOURCES

The following pages contain several of the various easy-to-use resources referenced in this document. The Glam Study Toolkit is best viewed — and used! — via our website at www.museums.ca. The documents that follow are downloadable via the website.

- ▶ **GLAM STUDY KEY MESSAGES,
INCLUDES SECTOR SPECIFIC MESSAGING**

 - ▶ **VALUE OF GLAMS IN CANADA INFOGRAPHIC**

 - ▶ **VALUE OF GALLERIES IN CANADA INFOGRAPHIC**

 - ▶ **VALUE OF LIBRARIES IN CANADA INFOGRAPHIC**

 - ▶ **VALUE OF ARCHIVES IN CANADA INFOGRAPHIC**

 - ▶ **VALUE OF MUSEUMS IN CANADA INFOGRAPHIC**

 - ▶ **GLAM STUDY FACT SHEET**
-



GLAM STUDY KEY MESSAGES

The key messages produced for this toolkit are the backbone to all of the tips and activities aimed at increasing awareness of the GLAM findings. Below, you will find general key messages as well as sector specific messages, some regional data and some useful information on how the GLAM sector compares to other sectors.

- To capture the value of galleries, libraries, archives, and museums (GLAMs), a national survey of 2,045 Canadian residents was conducted and the results were released in December 2019.
- The study was commissioned by the Ottawa Declaration Working Group; a consortium of stakeholders co-led by the Canadian Museums Association (CMA) and Library and Archives Canada (LAC).
- The study was conducted by Oxford Economics. The results showcase the incredible value and pride Canadians place in GLAMs. These institutions play a vital role in Canadian society.
- A key finding of this study is that users of these institutions would be willing to spend a total of \$4 billion more per year out of their own collective pocket to access them if required — a testament to just how much they value GLAMs. In fact, 96% of respondents surveyed for the study said that museums contribute to our quality of life.
- The value of GLAMs is strong even with those Canadians who don't visit them.
- When non-visitors over the past 12 months were asked the maximum amount they would pay each year as a donation to maintain all of Canada's non-profit GLAMs they stated they would support \$22 per year for museums, \$17 for galleries and libraries, and \$14 for archives - this represents an estimated \$2.2 billion.
- GLAM visits are associated with a number of important societal benefits including greater literacy, curiosity, innovation, knowledge and creativity, increased rates of volunteerism and a better sense of community.
- GLAMs contribute positively to overall health. In fact, GLAM users report overall health as 14% better than non-users.
- Canadians visit GLAMs in large numbers annually. In fact, GLAMs welcomed more than six times more annual visitors than National Hockey League teams did during the 2018-19 season (150 million vs. 22 million visitors).



Economic benefits

- Canada gains nearly \$8.6 billion a year in economic benefits, in addition to a myriad of social advantages, from the existence of non-profit galleries, libraries, archives and museums (GLAMs). This is comparable to the Canadian wine and grape industry (\$9.04 billion¹) and general aviation industry (\$9.3 billion²)
- For every dollar invested in galleries, libraries, archives, and museums, Canadian society gets nearly four dollars in benefits — a return that is on par with government investments in transportation infrastructure projects.
- Another way for users to interact directly with GLAMs is through their official websites, online catalogues and social media pages. The study pegged the value of these online visits at \$1.6 billion per year, and this was before the COVID-19 pandemic, during which time more museums than ever before have been offering virtual options for the public to engage with their collections.
- GLAMs generate significant educational benefits for Canada, including through school visits which provide children across the country with important learning opportunities. The value of these visits is estimated at \$3.1 billion.

Social benefits

- Canadian GLAMs receive in the region of 150 million visits every year, but they are much more than simply visitor attractions. They preserve and promote Canadian heritage domestically and around the globe, while providing access to resources for education, research, learning and artistic creation.
- The GLAM sector feeds the economy and innovation and forms an integral part of the fabric of our nation, benefiting Canadians of all ages, backgrounds and regions.
- The annual value to an average GLAM user is equivalent to \$1,440 in improved wellbeing (as measured through health effects). In other words, visiting GLAMs has the same wellbeing effect of receiving a monetary bonus of \$1,440 per year.

1 <http://www.canadianvintners.com/wp-content/uploads/2017/06/Canada-Economic-Impact-Report-2015.pdf>

2 <https://copanational.org/en/ga-economic-impact/>



Industry Comparisons

- GLAMs had more than 70 times the number of annual visitors than CFL games did during the 2019 season (150 million vs. 1.85 million)
- GLAMs had more than 6 times the number of annual visitors than NHL games did during the 2018-19 season (150 million vs. 22 million)
- GLAMs had more than double the number of annual visitors than Major League Baseball games did during the 2018-19 season. (150 million vs. 68.9 million)
- GLAMs contribute four times as much to the Canadian economy than the live performance domain (\$11.6-billion vs. \$2.8-billion)
- GLAMs is larger than the wine and grape industry in Canada (\$11.6-billion vs. \$9-billion)

Regional data

The study focuses on the results at the national level. That being said, we asked Oxford whether there were any interesting regional differences or issues that arose in the study. When we look at regional findings particularly regarding willingness to pay, there are some interesting findings. For example:

- Quebec's user values for libraries and its non-user values for galleries and archives are the lowest among the provincial results able to be disaggregated.
- Quebec users' valuation of galleries exceeds that of Ontario's (and indeed the national average). The same is true for museums where Quebec's user valuations are also well above the national average (and second only to Alberta's).
- Ontario's user valuation of archives is the highest, nationally.
- Smaller jurisdictions such as Nova Scotia and Newfoundland and Labrador and to some extent Manitoba and Alberta appear to have relatively high values for GLAMs. Though some of these results may still be influenced by small samples, it's possible that smaller communities place relatively high values on GLAMs because of their importance to community life (whereas major urban centres have a wide variety of other diversions/opportunities).



About the study

Oxford Economics was commissioned in 2018 to undertake this study, completed in December 2019 and published in May 2020. The study is based on data available in 2018-19. The study provides an assessment of the value of GLAMs using cost-benefit analysis (CBA) within an economic welfare framework. It takes a Total Economic Value (TEV) approach, which measures the economic benefits accruing not just to direct beneficiaries such as GLAM visitors, but to “non-users” – people who value GLAMs’ existence even if they have not recently visited one. This is one study which, when taking into consideration other research (see Additional Information in this toolkit for more details) can help provide a more comprehensive picture of the situation.

About Oxford Economics

Oxford Economics is a leader in global forecasting and quantitative analysis. Its worldwide client base comprises more than 1,500 international corporations, financial institutions, government organisations, and universities. Its best-in-class global economic and industry models and analytical tools offer an unmatched ability to forecast external market trends and assess their economic, social and business impact.



Key Messages by Sector: Galleries

- Now, more than ever, is a critical time to ensure that galleries have adequate funding to ensure their financial health.
- A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that Galleries contribute millions to the Canadian economy as well as to societal well-being.
- By organizing exhibitions and programming, galleries advance the knowledge, understanding and appreciation of the arts, and help support research and inspire creativity.
- Visiting a gallery is good for your overall health. Gallery visitors have a 35% higher probability of reporting very good/excellent health than non-visitors.
- Art gallery visitors are more involved in the community with 89% higher probability of having volunteered in the past 12 months than non-visitors, even accounting for other factors.
- For every dollar invested in galleries, society gets nearly \$4 in benefits.
- The economic benefits of galleries are immense at \$1.6 billion/year.
- Galleries offer \$435-million/year in educational benefits and a value of \$378-million/year in online visits.



Key Messages by Sector: Libraries

- Now, more than ever, is a critical time to ensure that libraries have adequate funding to ensure their financial health. Libraries are crucial for access to research resources.
- A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that libraries contribute millions to the Canadian economy as well as to societal well-being.
- Libraries are vital to communities across Canada with 100 million estimated visits every year.
- Libraries are fundamental cornerstones for local communities. In addition to providing access to a wealth of resources for reading, education, and research, they help people further their skills, find jobs, and experience a strong sense of place, among many other things.
- Libraries spend millions of dollars on books, journals, and databases, that are then made available to the public for free. They are a precious resource for communities across the country.
- Libraries provide \$3.4-billion/year in economic benefits
- Libraries offer \$1.3-billion/year in educational benefits and a value of \$636-million/year in online visits.
- For every dollar invested in libraries, society gets over \$4 dollars in benefits.



Key Messages by Sector: Archives

- Now, more than ever, is a critical time for archives to have adequate funding to ensure their financial health.
- A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that Archives contribute millions to the Canadian economy as well as to societal well-being.
- Archives play the fundamental role of providing evidence of past activities.
- Archives preserve records relating to the political, economic and social spheres of life, as well as about achievements in the arts, culture and sports, thereby helping us learn about our history and our society and increasing our sense of identity.
- Archives provide \$652-million/year in economic benefits.
- Archives offer \$41-million/year in education benefits and a value of \$353-million/year in online visits.
- For every dollar invested in archives, society gets nearly \$3 in benefits.



Key Messages by Sector: Museums

- Now, more than ever, is a critical time to ensure that museums have adequate funding to ensure their financial health.
- A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that museums contribute millions to the Canadian economy as well as to societal well-being.
- 96% of respondents surveyed for the study said that museums contribute to our overall quality of life in Canada.
- Museums across Canada welcome an estimated 30 million annual visitors, that's over five million more than the entire National Hockey League did during the 2018-19 season. (30 million vs. 22 million)
- Museums provide \$2.9 billion/year in economic benefits.
- Museums provide a value of \$1.2 billion/year in educational benefits and \$277-million/year in value of online visits.
- For every dollar invested in museums, society gets nearly \$4 in benefits.

GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS ARE OTHERWISE KNOWN AS THE GLAM SECTOR

VALUE OF GLAMS IN CANADA

Based on the study conducted by Oxford Economics using metrics commonly employed by cultural institutions, as well as the results of a national survey of more than 2,000 Canadians



\$8.6
BILLION/YEAR

GAINS IN
ECONOMIC
BENEFITS



\$1,440
A YEAR

VALUE OF
IMPROVED HEALTH
AND WELL-BEING



\$3.1
BILLION/YEAR

VALUE OF
EDUCATIONAL
BENEFITS



\$1.6
BILLION/YEAR

VALUE OF
ONLINE VISITS OF
THE SECTOR



150
MILLION/YEAR

VISITS TO
CANADIAN
GLAMS



GLAM USERS REPORT
OVERALL HEALTH AS
14% BETTER THAN NON-USERS



FOR EVERY DOLLAR
INVESTED IN GLAMS,
SOCIETY GETS NEARLY
FOUR DOLLARS IN BENEFITS



WILLING
TO INVEST



+\$4
BILLION/YEAR



PREPARED
TO CONTRIBUTE



\$2.2
BILLION/YEAR

VALUE OF GALLERIES IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that galleries contribute millions to the Canadian economy and societal well-being.

\$1.6B /// YEAR
IN ECONOMIC BENEFITS

\$435M /// YEAR
VALUE OF EDUCATIONAL BENEFITS

\$378M /// YEAR
VALUE OF GALLERIES ONLINE VISITS

GALLERY VISITORS HAVE A

35% HIGHER PROBABILITY OF REPORTING VERY GOOD/EXCELLENT **HEALTH** THAN NON-VISITORS



FOR EVERY DOLLAR INVESTED IN GALLERIES, SOCIETY GETS NEARLY **FOUR DOLLARS** IN BENEFITS



 GALLERY USER

WILLING TO INVEST

+\$615M /// YEAR

 GALLERY NON-USER

PREPARED TO CONTRIBUTE

+\$536M /// YEAR

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF GLAMS (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

VALUE OF LIBRARIES IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that libraries contribute millions to the Canadian economy and societal well-being.

\$3.4B /// YEAR
IN ECONOMIC BENEFITS

\$1.3B /// YEAR
VALUE OF EDUCATIONAL BENEFITS

\$636M /// YEAR
VALUE OF LIBRARIES ONLINE VISITS

100M /// YEAR
VISITS TO LIBRARIES



FOR EVERY DOLLAR INVESTED IN LIBRARIES, SOCIETY GETS NEARLY **FOUR DOLLARS** IN BENEFITS



 LIBRARY USER

WILLING TO INVEST

+\$1.7B /// YEAR

 LIBRARY NON-USER

PREPARED TO CONTRIBUTE

+\$537M /// YEAR

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF GLAMS (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

VALUE OF ARCHIVES IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that archives contribute millions to the Canadian economy and societal well-being.

\$652M /// YEAR
IN ECONOMIC BENEFITS

\$41M /// YEAR
VALUE OF EDUCATIONAL BENEFITS

\$353M /// YEAR
VALUE OF ARCHIVES ONLINE VISITS

FOR EVERY DOLLAR INVESTED IN ARCHIVES,
SOCIETY GETS NEARLY **THREE DOLLARS** IN BENEFITS



 ARCHIVES
USER

WILLING TO INVEST

+\$185M /// YEAR

 ARCHIVES
NON-USER

PREPARED TO CONTRIBUTE

+\$446M /// YEAR

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF GLAMS (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.

VALUE OF MUSEUMS IN CANADA

A study commissioned by the Ottawa Declaration Working Group, co-led by Library and Archives Canada and the Canadian Museums Association, found that museums contribute millions to the Canadian economy and societal well-being.

\$2.9B /// YEAR
IN ECONOMIC BENEFITS

\$1.2B /// YEAR
VALUE OF EDUCATIONAL BENEFITS

\$277M /// YEAR
VALUE OF MUSEUMS ONLINE VISITS

30M /// YEAR 
VISITS TO MUSEUMS

96% 
OF CANADIANS
BELIEVE MUSEUMS
CONTRIBUTE TO OUR
QUALITY OF LIFE

FOR EVERY DOLLAR
INVESTED IN MUSEUMS,
SOCIETY GETS NEARLY
FOUR DOLLARS IN BENEFITS



 MUSEUMS
USER

WILLING TO INVEST

+\$1.3B /// YEAR

 MUSEUMS
NON-USER

PREPARED TO CONTRIBUTE

+\$693M /// YEAR

THE STUDY'S AIM WAS TO EXPLORE THE ECONOMIC AND SOCIAL IMPACTS OF GLAMS (GALLERIES, LIBRARIES, ARCHIVES, MUSEUMS) AND WAS CONDUCTED BY OXFORD ECONOMICS USING METRICS COMMONLY EMPLOYED BY CULTURAL INSTITUTIONS, AS WELL AS THE RESULTS OF A NATIONAL SURVEY OF MORE THAN 2,000 CANADIANS.



GALLERIES, LIBRARIES, ARCHIVES AND MUSEUMS PLAY VITAL ROLE IN CANADIAN SOCIETY

Across Canada, our culture and the way we experience culture is constantly evolving and plays an important role in our identity, creativity, knowledge and memories, giving us unique insights into our past and present. Local galleries, libraries, archives and museums (GLAMs) are key fixtures of our communities that profoundly help enrich and in turn, shape our lives.

From school visits to local museums as children to first dates visiting national galleries with world-renowned painting and sculptures, Canadians across the country have experienced GLAMs throughout their lives. However, there is consistently a lack of understanding and expressed value around their larger significance in our country.

The GLAM community wanted to better understand how their value could be expressed not only within their individual communities but across Canada. In late 2018, the Ottawa Declaration Working Group; a consortium of stakeholders co-led by the Canadian Museums Association (CMA) and Library and Archives Canada (LAC), commissioned a national study with Oxford Economics to better understand their value in Canada. The results showcase the incredible value and pride Canadians place in GLAMs, the vital role that institutions play in communities and their contribution to economic prosperity in Canada.

Key findings from Value Study of GLAMs in Canada:

Canadians visit GLAMs in large numbers, with over **150 million visits** every year and play an important role in preserving and promoting Canadian heritage through access to resources for education, research, learning and artistic creation. This in turn has generated nearly **\$8.6 billion a year in economic benefits** for Canada, in addition to a myriad of social advantages. This is comparable to the Canadian wine & grape industry (\$9.04 billion) and general aviation industry (\$9.3 billion).

\$8.6B
A YEAR IN
ECONOMIC BENEFITS

For every dollar invested in Galleries, Libraries, Archives, and Museums, Canadian society gets nearly four dollars in benefits – a return that is on par with government investments in transportation infrastructure projects.



The value of **online visits to GLAM official websites, catalogues and social media pages is \$1.6 billion per year, and this was before the COVID-19 pandemic**, during which time more museums than ever before have been offering virtual options for the public to engage with their collections.

ONLINE VISITS TO GLAM OFFICIAL WEBSITES, CATALOGUES AND SOCIAL MEDIA PAGES IS

\$1.6B /// YEAR

GLAM visits are associated with a number of other important societal benefits including **greater literacy, curiosity, innovation, knowledge and creativity, increased rates of volunteerism and a better sense of community.**



GLAMs contribute positively to overall health. In fact, **GLAM users report overall health as 14% better than non-users.**

14%

The GLAM sector feeds the economy and innovation while being an integral part of the fabric of our nation, benefiting Canadians of all ages, backgrounds and regions. The annual value to an average GLAM user is equivalent to \$1,440 in improved wellbeing (as measured through health effects). **In other words, visiting GLAMs has the same wellbeing effect of receiving a monetary bonus of \$1,440 per year.**

GLAMs generate significant **educational benefits** for Canada, including through school visits which provide children across the country with important learning opportunities. The value of these visits is estimated at **\$3.1 billion.**

The economic and social benefits are immense and now, more than ever, is a critical time to ensure that galleries, libraries, archives and museums are adequately funded and supported to ensure their financial health and community viability.



CANADIAN MUSEUMS ASSOCIATION

The Canadian Museum Association is the voice for Canada's vibrant museum community, from small, volunteer-driven organizations to cherished national institutions, and for the millions of Canadians whose lives are enriched by museums. We advocate for public policies and support, we build skills across the profession, and we establish and inspire connections to strengthen and sustain museums.

Contact us

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www.museums.ca

The CMA acknowledges that its Secretariat is located on the traditional territory of the Algonquin Anishnaabeg People. We extend our appreciation for the opportunity to live and learn on this territory in mutual respect and gratitude.

The CMA also acknowledges that as a national association, its work relates to other First Nations, Inuit, Métis and urban Indigenous people. We are committed to demonstrate respect for these groups and promote the importance of their cultural contributions through history and today.