

REPORT ON
ECONOMIC IMPACTS AND OPPORTUNITIES
THE CULTURAL INDUSTRIES
IN PRINCE EDWARD ISLAND

VOLUME 1

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Submitted by:

The DPA Group Inc.
Charlottetown
Prince Edward Island

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PREAMBLE

This report sets out to accomplish a dual task.

It seeks to establish the role and importance of the cultural industries within the economy of P.E.I.

It also seeks to make clear the importance of cultural activities within the life of any community, which was emphasized by almost all persons interviewed in the course of the study.

Cultural activities are the focal points for community life. They constitute the reason why people enjoy their home communities and frequently elect to remain there; in large part they are the reason why businesses select communities in which to locate, and why travellers come to visit them. Communities without a cultural life - without music and art, theatre and dance, and their own indigenous artifacts - are barren places indeed, brief way-stations on the road to places more attractive.

The cultural industries then provide vehicles for carrying out and preserving the impact of cultural activities. They provide the people who bring technique and production methods to culture, producing films, books, videos and records. They provide the galleries for painters, the publishing houses for writers, the museums and historic sites for gathering the stories of communities at central locations. They produce the pictorial history of communities, the plays and musicals, and the crafts and artifacts by which whole communities may be distinguished from one another.

Until recently we would not have thought of measuring the economic impact of cultural activities. They were simply taken for granted as central to all community life, important in

transporting antiquity and culture across generations, and in preserving the important stories and records of each age. To measure their economic impact would have seemed at one time akin to measuring the impact of child care, or of worship.

It is only in the present age, with the consolidation of important cultural activities within corporate enterprises, even at the multi-national level, that concerns have newly-risen over what may be lost by whole provinces and regions if they do not pay attention to and support their indigenous cultural agents and agencies.

We wish to begin this report, therefore, by recognizing the overriding importance of all cultural activities within Prince Edward Island in relation to pre-eminent esthetic qualities and the pure enjoyment of community life. Its authors fully realize that the pleasures which artists bring to a society cannot be fully assessed in a project whose focus is primarily on economic impact.

The report will seek to tell the story of the magnitude of effort being made by several thousand Islanders, in all walks, in contributing to the richness of Island life. In doing so, we will use the universal measure which people have adopted for attributing value to work. Through this device we propose to show, in part, the impact made on the economy of the province by its cultural industries. We do so in full understanding that economic impacts may well be the least important of all the impacts and effects resulting from the activities under study.

- . *"There are few fields of human endeavour which do not depend in some measure on the application of creative insights.*
- . *". . . the role of creative artists should be given special priority in consideration of cultural policies in order that the public might benefit from the results of creative work.*
- . *". . . audiences need to be open to new experiences in order that original work may emerge.*
- . *". . . one of the chief goals of cultural policy must be to establish strong and stable lines of communication between artists of all kinds and those who will see, read, or hear their messages.*
- . *". . . culture and the arts will best flourish in Canada when our artists are able to present their work to audiences with a fair measure of freedom from social, economic, and political constraints.*
- . *". . . the evidence is overwhelming that Canada does not provide an adequate living for most of its professional artists. It is clear to us that the largest subsidy to the cultural life of Canada comes not from governments, corporations, or other patrons, but from the artists themselves, through their unpaid or underpaid labour.*
- . *". . . federal cultural policy has largely favoured physical plant and organizational development over artistic creativity and achievement.*
- . *"We have come to believe that federal cultural policy must place a new emphasis on encouraging the best use of our concert halls, theatres, cinemas, galleries, and airwaves for the presentation to Canadians of the finest works of*

Canada's own creative artists. If we fail to make the stimulation of our own creative imagination the heart of cultural policies, we will continue to live in a country dependent on the products of other cultures and we will never elevate life in Canada to a space essentially its own."

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1.0 INTRODUCTION

1.1 Background to the Study

The cultural industries are an integral part of the provincial economy. To focus solely on the economic value of the arts and culture at the expense of their creative, social, and quality of life value would be a severe distortion, but to ignore their economic significance does not provide a complete picture.

In this light, the Board of Directors of the P.E.I. Council of the Arts requested the Government of P.E.I. in September, 1983, to undertake an examination of the cultural industries on the Island in order to determine the strength of those industries, and their real and potential contribution to the economy of the province. The Minister of Industry responded to that request by designating an inter-departmental committee to study the issues raised by the Arts Council. Its mandate included an examination of the desirability of taking measures to assist in realizing the growth potential of this industrial sector. The Committee completed its work in February 1986.

The study committee report included:

- . a preliminary inventory of cultural industries on P.E.I.
- . an analysis of their economic impact on the Island economy in terms of gross expenditures generated and jobs created
- . realistic opportunities available to the sector and constraints on actualizing those opportunities
- . a summary of current government policies and programs which contributed to the development of cultural industries
- . recommendations for future directions in this field.

A number of the recommendations were quickly adopted, while others have either been partially accepted or deferred. The first recommendation proposed that the province continue its efforts to negotiate "an ERDA (Economic and Regional Development Agreement) sub-agreement or, at the minimum, a Memorandum of Understanding with the Federal Government on cultural industries and communications." Early in 1987 the Minister of Community and Cultural Affairs met with the Federal Minister of Communications to discuss issues bearing on the sub-agreement, but the province was not satisfied with the comprehensiveness of the available financial data on the cultural industries. Because of this, a decision was reached that a more extensive study be undertaken to determine the full economic impact of cultural industries on the economy of the province and to outline a framework for possible public investments within a Federal-Provincial Agreement on cultural development.

In the summer of 1987 the Federal and Provincial Departments agreed to conduct the proposed study jointly and through a public tendering process. The DPA Group Inc. of Charlottetown was selected to carry it out. DPA was assisted in its work by an Interdepartmental Steering Committee, whose members are named in Appendix 1.

1.2 Study Purpose and Objectives

The purpose of this study is to assess the economic impact of cultural industries on the economy of Prince Edward Island and to determine the future development opportunities of the cultural sector in the province. More specifically, the following project objectives were established by the terms of reference for the study.

- 1) To prepare an inventory of the cultural industries by number, size and distribution, including the identification

of trend patterns, and realistic growth potential within specific sectors;

- 2) To determine the full economic impact of the cultural industries on the Island economy;
- 3) To determine to the extent possible the economic relationship between the cultural industries and the tourism industry in the province;
- 4) To identify feasible economic opportunities and constraints on development, including new training, product development and marketing needs, and possible new technological applications;
- 5) To highlight potential policy issues bearing on the type and level of involvement on the part of the private sector, community interests, and government.

1.3 Scope of the Study

Cultural industries involve the production and sale of services and products derived from cultural activities. There are many possible dimensions along which cultural industries can be classified. However, for the purpose of assessing their potential economic impact a nine-way typology was adopted by the Study Team, including:

- . Literary Arts
- . Performing Arts
- . Visual Arts

- . Arts Education¹
- . Crafts
- . Film and Video
- . Sound Production
- . Heritage Institutions
- . Festivals

Because of the relatively small local market for operators in the cultural industries, it was recognized that the opportunities for full-time professional commitment would be severely limited. For this reason, the definition was expanded to include not only those who are involved at a professional level but also serious practitioners who are deriving revenue on a part-time basis, although not yet in sufficient quantity to be self-supporting.

The typology outlined also focuses on those elements which would most likely fall within the scope of a new Federal-Provincial cultural sub-agreement. For this reason expenditures relating to the following were excluded:

- . public and school libraries
- . radio and television broadcasting
- . newspapers
- . primary, secondary and post secondary education
- . government cultural agencies

Other exclusions had to be made for the following reasons: 1) to avoid double counting, 2) because earnings were likely to be quite small in relation to the total industrial effort, and 3)

¹For purposes of this report, the term "arts" education is used to describe a comprehensive program covering a variety of arts related subjects, particularly visual arts, music, and the performing arts. "Art" education is more narrowly used with reference to the visual arts only. Similarly, where reference is made to "the arts" the use is generic, whereas reference to "art" is with respect to visual art.

because a disproportionate amount of resources would be required to gather the necessary economic data.

Operations excluded for these reasons included:

- . those active in the "shadow economy", who bring in cash income on a small scale through the informal market;
- . non-resident practitioners who establish here for the summer months to capitalize on the peak summer tourism;
- . hobbyists active on an occasional basis only, without professional or career aspirations in their field of interest;
- . retail outlets.

The final typology is presented in Exhibit 1.1.

1.4 Methodology and Approach

The study methodology used was as rigorous as possible, within the constraints of the study budget and time frame. Research activities were designed to approach the study objectives from several points of view. These included:

- . a literature review
- . extensive personal interviews
- . preparation of a detailed cultural sector inventory
- . mail out/telephone quantitative survey
- . focus group sessions with sectoral representatives
- . examination of supplementary tourism reports

This section describes the main features of the approach and methodology used in completing major study components: the

 EXHIBIT 1.1 Cultural Industries Within and Outside Study

	<u>Within Study Scope</u>	<u>Outside Study Scope</u>
1	Literary Arts/Book Publishing	
	. Writers	. Libraries
	. Book Publishers	. Magazines and Periodicals
		. Bookstores
		. Amateur Writers
2	Performing Arts	
	. Theatre Groups	. Promoters
	. Dance Groups	. Actors/actresses
	. Music Groups	. Amateur Productions
3	Visual Arts	
	. Individual Visual Artists, e.g. Painters, Photographers	. Industrial Arts
		. Commercial Art Galleries
		. Retail Suppliers
		. Hobbyists
4	Arts Education	
	. Dance Schools/individual teachers	. School and University Arts Programs
	. Music Teachers	
	. Theatre Schools	
5	Crafts	
	. Craft Coopertives	. Individual craftspersons
	. Craft Guilds	. Hobbyists
	. Producer-Retailers	
	. Craft Retail Stores	
6	Film and Video	
	. Film and Video Companies	. Movies Theatres
		. Drive-in Theatres
		. Casting Agents
		. Suppliers
		. Actors/Actresses
7	Sound Production	
	. Recording Studios	. Record Stores
	. Sound Production Companies	. Individual Recording Artists
		. Promoters
8	Heritage Institutions	
	. Museums (Private and Public)	. Historic Sites and Parks
		. Planetarium
		. Archives
		. Tourist Attractions
		. Building Conservation
9	Festivals	
	. Community Festivals with a Cultural/Heritage Component	. Individual Artists
		. Non-cultural Festivals
10	Newspapers and Broadcasting	

sectoral inventory, the quantitative survey and the qualitative survey.

1.4.1 Sectoral Inventory

The sectoral inventory, one of the requirements of the study, was an important first step in determining the scope of the cultural industries, and to provide the universe for selecting the quantitative survey sample. The inventory contained in Volume 2 is presented geographically by county and sector, including and identifying by name each operation and its location.

As a result of numerous discussions with government officials and representatives of cultural industries and a literature review, the above referenced nine-way typology of the cultural industries was selected for the potential economic impact analysis.

Using a variety of sources (e.g. government officials, association spokespersons, industry representatives) a list of producers, performers, and artists representing the nine sectors was developed.

On the basis of more reviews and discussions the list was modified to contain only those practitioners thought to be professional and serious amateurs. The present level of organization in the various sectors (particularly in Visual Arts, Arts Education and Performing Arts) did not ensure identification of all practitioners.

An inventory was developed which represented what was believed to be a reasonable coverage of the "universe" of cultural industries, consistent with time and budget allocations for the project. The list contained 490 operators and the survey sample was drawn from this list.

In the case of crafts only, production was assumed to be at the level of the producer-retailer, cooperative, or crafts retailer, with primary producers being captured indirectly. This was determined to be the most appropriate way to capture the total effort in the sector.

Exhibit 1.2 summarizes the sectoral distribution of the original universe, the actual universe, and the sample selected. This latter information is provided only to indicate the representative nature of the sample. The report does not include analysis at the level of individual sectors.

It should be noted that as a result of the quantitative survey process it was found that 12% of those in the inventory did not conform with the project team's definition of cultural industry, primarily because they were hobbyists or taught within the school system. On the other hand, additional operators were identified during the course of the interview process, particularly in the performing arts sector, and these were added to the inventories. The revised lists comprise 463 operators. In the study team's view the revisions to the master lists did not significantly affect the representative nature of the sample.

1.4.2 Quantitative Survey

The primary research method for the quantitative survey was a series of highly structured telephone interviews. The quantitative survey was designed to obtain basic business data for the economic impact analysis.

 EXHIBIT 1.2 Sectoral Distribution of Original Universe, Actual Universe, and Sample Selected.

	Original Universe (Used for Sample Selection)		Actual Universe		Sample	
	Number	% of Total	Number	% of Total	Number	% of Total
	-----	-----	-----	-----	-----	-----
Literary Arts	31	(6)	31	(7)	8	(10)
Performing Arts	59	(12)	80	(17)	8	(10)
Visual Arts	118	(24)	98	(21)	22	(28)
Arts Education	92	(19)	67	(14)	11	(14)
Crafts*	104	(21)	100	(22)	12	(15)
Film & Video	3	(1)	5	(1)	1	(1)
Sound Production	4	(1)	5	(1)	1	(1)
Heritage Institutions	28	(6)	33	(7)	8	(10)
Festivals	51	(10)	44	(10)	8	(10)
	----	----	----	----	----	----
TOTALS	490	100	463	100	79	100

* Production was assumed to be at the level of the producer-retailer, cooperative, guild or retailer, with primary producers captured indirectly.

The interview guide reproduced in Appendix 2 was developed in conjunction with Steering Committee members and the project technical advisor.

Several pre-tests were conducted and the interview guides were modified accordingly, and mailed to the selected sample.

Of the total of 490 operations listed in the inventory a random sample of 80 was selected, using a Table of Random Numbers providing a 95% level of confidence;

An additional 56 names were also selected as replacements for non-respondents from the original sample. The 56 non-respondents were accounted for as follows:

a) Valid Non-Respondents (40)

1) contact could not be established (10)

2) inability to establish location (17)

3) no longer involved in production (7)

4) refusals (6)

b) Invalid Non-Respondents (16)

5) non-compliance with project team's definition of cultural industry (e.g. hobbyist, teaching within school system, etc.) (16)

This number affected the original universe, and the inventory was modified accordingly by deleting those operations.

To ensure a high response rate, numerous follow-up calls (up to nine) were conducted before an operator was deleted from the sample.

Of the 80 interviews conducted, one was deleted in the final review because the interview dealt with the operator's involvement in a volunteer association, which was outside the purview of the study.

All completed survey forms were coded and input to a micro computer (using DBASE and SPSS software) to facilitate the interpretation of results.

1.4.3 Qualitative Survey

The primary research method for the qualitative survey was a series of semi-structured group and individual interviews with representatives from each sector, conducted to gain information on trends, technological applications, developmental opportunities and constraints, and to provide background for the interpretation of project findings.

The interview guide contained in Appendix 3 was developed in conjunction with Steering Committee members and the project technical advisor. The choice of interview guidelines reflected the diversity of issues to be addressed, the expertise of participants, and the necessity of being able to probe certain responses as required.

A pragmatic approach was used in identifying the sample of informed sectoral representatives for the group interviews. The final selection of persons to be interviewed was made by the project leader. A list of the 55 persons interviewed in the nine sectors is contained in Appendix 4.

Interview guidelines were mailed to the selected sectoral representatives prior to the interview to provide a focus for the interview sessions and to familiarize the representatives with the nature of the study.

The results of the qualitative interviews are contained in the Volume 2 of the Report.

1.5 Economic Impact Analysis

The economic impact of the cultural industries (i.e. on sales, income and employment) is a measure of the economic benefits that accrue to a specific area (P.E.I.) as a result of the activities of these industries. Economic benefits are the increases in the income of individuals or businesses in that area.

There are primarily three types of economic impacts - direct, indirect and induced. The direct impacts are those associated with sales, income or employment in cultural industries. The indirect and induced impacts are what are generally known as multiplier impacts. Indirect impacts result from the purchase of goods and services of cultural industries from other businesses (which supply necessary materials and services which generates more indirect purchases, and so on). Induced impacts relate to the further impact associated with the cultural industry's employees re-spending the wages and salaries they earned.

Since there is no official data source (e.g. Statistics Canada) for the sector as defined or for its components, we could not base the economic impact analysis on published information bearing on Gross Domestic Product (value added, income), sales and employment. The study team attempted to collect information to measure the values directly. While the survey can provide estimates of these indicators we are not confident that the GDP (income, value added) estimates would be sufficiently accurate,

given that the data collected was not up to Statistics Canada standards. This is a problem experienced with similar studies in this field, as documented by the 1984 Woods- Gordon Report on the Economic Impact of the Arts in Alberta.

Accordingly, we base our economic impact analysis on the survey's sales (otherwise called receipts or value of shipments) and employment estimates, which are sufficiently valid for the purposes of this study.

1.6 Constraints

There were several constraints that placed limitations upon possible interpretation of the study results:

The awarding of the contract was delayed until after the peak tourist season. This prevented the possibility of a tourist survey being conducted to determine the relationship between cultural industries and tourism, and made it necessary to rely on secondary sources for this information.

The sampling frame (universe) was constrained by the lack of sectoral organization and difficulties encountered in identifying all operations within the cultural industries, even those engaged full-time.

Given budget constraints the analysis was based on the universe as a whole rather than at the sectoral level.

The inclusion of producers who are involved on a part-time as well as a full-time professional basis lowered median income levels, but has ensured the capture of a greater part of the total effort in each sector.

It should be emphasized that the estimate of economic impact provided in Chapter 2 is conservative throughout because:

major cultural industries, as the term is defined by Statistics Canada, (e.g. newspapers, radio and television broadcasting, libraries, and retail stores) are excluded;

the inventory created for the survey is an important first step in identifying the cultural industries but is considered to be incomplete, particularly with respect to the performing arts, visual arts and arts education;

there is no means to identify all persons engaged in the industries on a part-time basis, such as in craft production and arts education.

1.7 Structure of the Report

Volume 1

Following this Introductory Chapter, the Report presents an overview of the cultural industries on Prince Edward Island in Chapter 2.

Chapter 3 then describes a number of significant strengths upon which expansion of the industries can be based, as well as constraints which must be dealt with as a precondition to serious development efforts.

Chapter 4 identifies a series of opportunities which may be exploited by the industries and Chapter 5 presents strategic elements to guide Government and the industries in doing so.

Chapter 6 then completes the report by proposing a number of policy recommendations for consideration by Government and possibly by sectoral organizations, where these are available.

Volume 2

Sectoral descriptions and inventories are presented separately in Volume 2, which should also be read for a presentation of the issues, concerns, and proposals identified in the course of the qualitative survey.

2.0 THE CULTURAL INDUSTRIES IN THE PRINCE EDWARD ISLAND ECONOMY

2.1 Introduction

This Chapter will describe the structure of the cultural industries on Prince Edward Island and their impact on its economy, relying primarily on data obtained during the quantitative survey. The findings are summarized as follows:

- . The cultural industries have a significant total impact on the economy of Prince Edward Island;
- . The cultural industries are characterized by an informal business structure;
- .. There is qualified optimism for future expansion within the industries;
- . There is a lack of industrial orientation and perspective;
- . Income levels in the cultural industries are low;
- . There is a significant linkage between cultural industries and tourism;
- . There is limited exploitation of the export market;
- . Government financial assistance has been an important factor in the survival of cultural industries.

2.2 The cultural industries have a significant total impact on the economy of Prince Edward Island.

The total number of employees in the cultural industries in 1986, including the business owners, was conservatively estimated to be

3,000 persons, which represents about 900 person years of employment. Labour costs totalled about \$9.5M in 1986.

Total sales for 1986 were approximately \$21.25M. The median sales per operation was \$8,000; 10% of the operations had sales totalling \$100,000 or more. The impact on the gross domestic product of cultural industries, (the sum of wages, salaries, supplementary labour income, rent, interest and profit before taxes) is estimated to be \$18,275M.

Exhibit 2.1 summarizes total economic impact using multipliers derived from the Statistics Canada Inter Regional Input Output Model - 1979, up-dated to reflect 1986 values.

2.3 The cultural industries are characterized by an informal business structure.

While there is some evidence that a growing number of operators recognize that they are involved in a business, the majority have adopted a highly informal business approach. The following findings support this conclusion.

- about 52% of the cultural industries began selling their products in 1980 or later, and had been in business for only seven years or less as of the effective date of the survey; only 15% began selling more than ten years ago;

- most businesses (73%) are unincorporated;

Exhibit 2.1 Total Economic Impact of the Cultural
Industries on P.E.I. using 1986 Data

	<u>Direct Economic Impact</u>	<u>Induced and Indirect, Economic Impact</u>	<u>Total Economic Impact</u>
Gross Sales	\$21.25M	\$14.025M	\$35.275M
Employment	3,000 jobs	205 jobs	3,205 jobs
Person Years of Employment	900 pys	180 pys	1,080 pys

. the majority of businesses (56%) are sole proprietorships;

. only 21% of businesses are located on commercial property or industrial parks, .58% are located at the operator's home or workshop;

. the majority (53%) of owners provide their own bookkeeping services; professionals account for only 18% of such services;

. the majority (75%) of cultural industries sell or provide services directly to consumers, as opposed to selling through retailers or brokers. Thus they provide the functions of producer, marketer-promoter, and retailer.

These findings lead to the conclusion that there is not a strong sense of industry or of "industrial vision" in the various sectors, which is an important consideration in relation to

industrial development efforts. This will be further discussed in Section 2.5.

2.4 There is qualified optimism for future expansion within the industries.

Four indicators of potential expansion within the cultural industries were derived from the survey questionnaire. These related to:

- . business owner involvement
- . employment opportunities
- . total annual sales
- . anticipated expansion plans

1) Business Owner Involvement

Exhibit 2.2 estimates the total involvement of business owners in cultural industries in 1984 and 1986, and their anticipated involvement in 1988.

As illustrated in this table there has been a 20% increase in the percentage of full-time business owners between 1984 and 1986, with a further increase proposed for 1988. This increase in 1986 includes some persons who were not active in 1984.

 Exhibit 2.2 Owner Participation in Cultural Industries

	<u>1984</u>		<u>1986</u>		<u>1988</u>	
	<u>%</u>	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>	<u>No.</u>
Full-Time	30	139	36	167	39	181
Part-Time	36	167	36	167	37	171
Seasonal Full-Time	6	28	10	46	12	56
Seasonal Part-Time	13	60	17	79	9	42
No Time*	15	70	1	5	4	19
	-----	-----	-----	-----	-----	-----
	100	463**	100	463	100	463

* Includes persons not in business in 1984, on sabbatical, or terminating operations.

** Variations in totals throughout are due to rounding when sample is multiplied to reflect the universe.

2) Employment

Exhibit 2.3 suggests, by size of operation, the employment opportunities in the cultural industries in 1984 and 1986, exclusive of business owner employment. The projected number of employees for 1988 is also included.

Exhibit 2.3 Employment by Size of Operation, 1984 and
1986, and Projected Employment for 1988.

<u>Number of Employees</u>	Percent		Anticipated
	<u>1984</u>	<u>1986</u>	<u>1988</u>
0	57	51	51
1-4	24	26	26
5-9	7	7	8
10-29	4	7	4
30+	9	10	11
	-----	-----	-----
	100	100	100

The actual numbers of persons employed in 1986, was approximately 3,000, which is also the number projected for 1988.

About half (51%) of the business operations in 1986 are one-person operations. While this table suggests little optimism for potential growth in employment in 1988, the data shows that there has been an overall increase in numbers of employees, and a decrease in the number of one-person operations between 1984 and 1986. It is not unusual for businesses to project their performance expectations cautiously, so that 1988 expectations should be interpreted as minimal in all cases.

3) Total Sales

Sales volumes for 1984 and 1986, and anticipated sales for 1988 are summarized in Exhibit 2.4.

Exhibit 2.4 Sales Volumes for 1984 and 1986, and Projected Volumes for 1988

Sales	Percent		
	<u>1984</u>	<u>1986</u>	<u>1988</u>
0	26*	1	5
1-4999	26	33	24
5000-9999	.8	21	14
10000-29999	15	15	21
30000-99999	17	17	11
100000 +	<u>9</u>	<u>13</u>	<u>26</u>
	100	100	100

*Did not operate in 1984.

There appears to be considerable optimism for growth in sales from 1986 to 1988. Operations with sales of \$100,000 or more are expected to double.

4) Anticipated Expansion Plans

The majority (60%) of operators indicated that they thought their business would expand in 1988; the two most prevalent reasons cited were:

- 1) established reputation and having gained respect of customers, which leads to increased demand,
- 2) increased promotion and marketing on and off the Island.

Other reasons advanced by individuals included:

- improved quality of product or service
- increased experience, greater understanding of the market and improved management skills
- more business opportunities, fairs, tourists
- improved technology leading to more efficient production
- longer season
- better location
- increased public awareness and interest
- improved customer service
- increased opportunity to pursue work because of personal circumstances.

Of the sixty percent of operators who anticipated growth over 1986 production and sales in 1988, the most optimistic sectors were visual arts, literary arts, and heritage institutions.

2.5 There is a lack of industrial orientation and perspective.

Most of the businesses (51%) are one-person operations, and there is a relatively high participation by volunteers. In addition there is a very low percentage of operators deriving the bulk of their income from their cultural activity, as indicated in Exhibit 2.5.

Exhibit 2.5 Income Derived from Cultural Industries as a
percentage of Annual Income, 1986.

<u>Percentage of Income</u>	<u>Percentage of Business Owners</u>
0 (volunteers)	13%
1-24%	25%
25-49%	9%
50-74%	6%
75-89%	2%
90-100%	<u>45%</u>
	100%

The sectors represent a mix of full-time professionals, part-time professionals who supplement their incomes through other sources, serious amateurs, hobbyists, and volunteers. Volunteers are particularly important in the Festivals sector, and operate in support of other sectors as well, including performing arts, heritage institutions, and arts education.

This mix of participants, and the extent to which operators in the cultural industries must supplement their income through other sources, hinders the emergence of an industrial orientation and perspective. It also raises the question of definition of the sectors. The universe was designed using, as far as possible, the conventions of the sectors yet 46% of participants derive less than half of their income from their work in the cultural industries. Fifty percent or more of performing arts, visual arts, and heritage institution respondents derived less than 25% of their annual income from those fields.

2.6 Income levels in the cultural industries are low

The average percentage of annual income derived by operators directly or indirectly from their work in the cultural industries is 61%. Only 20% of business operators made \$20,000 or more from these industries in 1986, and 47% reported less than \$5,000 from these sources.²

Exhibit 2.6 shows income levels derived from the cultural industries. Total business operator income for the sector is estimated to be \$4.45M.

Exhibit 2.6 Income Levels in 1986, by Business Owners

<u>Actual Income (\$)</u>	<u>Percentage of Business Owners</u>
\$0-499	8%
\$500-4999	39%
\$5000-9999	17%
\$10000-19999	16%
\$20000 +	<u>20%</u>
	100%

Owners of the longer established businesses made a higher proportion of their income from these sources. Of those business operators that began selling before 1970, 73% made almost all

²The lowest proportions of annual income earned from the cultural industries (less than 25%) were reported in the museums, visual arts, and performing arts sectors.

(90% or more) of their income from their cultural industry activity; of those that began selling from 1970 to 1979, 47% made 90% or more, and of those that began selling from 1980 on, only 35% made 90% or more of their income from that source.

As outlined in Section 2.4, the majority of business-owner involvement in the cultural industries is part-time, and about 27% is seasonal. In addition, 41% of business owners derive their income from their cultural activity on a "what's left after expenses" basis, with 9% paying themselves on an hourly basis and 13% on a salary basis. The remainder (36%) indicated that they derive their income on an "other" basis, which included piecework, royalties, honoraria, contract work, by painting sold, by lesson, or by performance. In the case of festivals, the respondents tended to be unpaid volunteers.

2.7 There is a significant linkage between cultural industries and tourism.

Exhibit 2.7 provides an estimate of the percentage of sales made to visitors to P.E.I.

Exhibit 2.7 Estimate of Sales Volume to Tourists, 1986.

<u>% of Sales to Tourists</u>	<u>% of Cultural Industries</u>	<u>No.</u>
0	31	144
1-9	12	56
10-49	12	56
50-89	26	120
90-100	<u>19</u>	<u>88</u>
	100	463

The foregoing exhibit indicates that 45% of all operations make 50% or more of their sales to tourists. Over 90% of the Crafts Sector report making more than half their sales to tourists, and almost 90% of Heritage Institutions.

Cultural industry representatives were asked to comment on the impact of their operation on Island tourism. Below is a sample of comments received:

- "tourists come to P.E.I. specifically for the festival, and businesses in the area benefit; it has become a tradition in the area"
- "dance makes a contribution to Island heritage and provides cultural activities for tourists; more recognition of this contribution by government is needed"
- "photograph galleries draw a lot of tourists; the kind of product which tourists buy indicates how they feel about the Island"
- "visual promotion, the visual impression of P.E.I. makes people come here; tourists ask specifically for paintings of Island scenes"
- "some books distributed nationally and in the United States have an Island flavour that brings people to the Island"
- "tourists are drawn to the theatre, especially those works that reflect the flavour of the region: there is a market for playhouse activities combined with area activities which would draw more people to the theatre"
- "many tourists who go to craft outlets are repeat customers, quality products are a good form of advertising for P.E.I.,

a direct link with creative artists is a positive experience for tourists"

- "museums and genealogy services are a draw for many tourists".

While it is evident that tourism is important to the cultural industries, we have not been able to establish through the quantitative research, except by inference, that the industries are important to tourism. That is to say, it may only be assumed that sales made by the cultural industries to tourists are in response to the latter's needs, and therefore make a contribution to successful tourist experiences.

Two P.E.I. Department of Tourism studies undertaken in selected markets in Ontario, New Brunswick and Nova Scotia, are useful as a complement to the views of operators.

In both studies, the number of potential visitors self-defined as "Culture Buffs" was about 5%; in the case of the Toronto-Hamilton market, however, this represents 315,000 people. Actual travel patterns indicate that of this number P.E.I. may draw about 4,000, as compared to almost 100,000 visitors to P.E.I. from Ontario each year. Thus there is a large Ontario market of persons interested in concerts, theatre, museums, galleries, and good eating experiences which does not include P.E.I. in its travel plans.

The so-called Cultural Buffs are an important market segment in relation to their spending patterns. In the case of the Toronto-Hamilton market, their average trip expenditures in 1986 was \$1096, compared to the average \$456 spent by those classed as Visiting; or to the composite average of \$590 per trip for visitors in the three categories which make up 75% of Island tourism. This suggests that the cultural sectors could make a

substantial contribution to tourism through enabling a refocusing of promotional efforts to the higher spending market segments.

While cultural activities were ranked low by Maritime visitors within their range of holiday activities, those which ranked higher tended to be of a highly casual nature - shopping, visiting, various forms of dining, and beach activities. Among the more purposeful activities, visiting craft shops, galleries, museums, and historic parks took precedence over such activities as attending amusement parks and nightclubs. This suggests that after the need for idleness has been satisfied, cultural activities are quite popular with summer visitors.

A third as yet unpublished study substantiates the positive impact of cultural activities on tourism. Of the non-residents who attended one major Island festival, 64% were found to be repeat visitors. 82% of non-residents patrons had intended to visit at least one of the festival events prior to coming to the Island; 9% gave it as the primary purpose of their trip, and 15% extended their stay in order to visit that particular Festival.

At present the cultural industries do not participate in any significant way in tourism planning and promotion. The opportunity for cultural experiences on P.E.I. has not been highlighted in P.E.I. tourism promotional material, except in relation to the Summer Festival. While a significant link can be asserted between culture and tourism, it must also be asserted that the link could be much stronger and more lucrative.

2.8 There is limited exploitation of the export market.

The majority (57%) of cultural industries did not make any sales off-Island in 1986, and 27% had less than 50% of their sales in the off-Island market; 16% of businesses made 50% or more of their annual sales in the export market. Excluding Museums, Arts

Education and Festivals, the number of operators with 50% or more sales in the export market increases to slightly more than 20%.

Operators are slowly recognizing the potential of the export market, and are slowly becoming involved in it. On the other hand, there were indications during the preparation of the survey inventory that out-of-province operators have no similar hesitation about seeking a market on P.E.I. Craft producers, visual artists, and performing artists frequently locate on P.E.I. during the tourist season, and Island producers are beginning to recognize the possibility that such an approach to exporting may represent a two-way street.

2.9 Government financial assistance has been an important factor in the survival of cultural industries.

Approximately 33% of the cultural industries indicated that they received some kind of public sector funding in 1986. Of this number, about half received grants from the provincial government and half from the federal government. A small minority of industries indicated that they received private funding from foundations, corporations, and the community. Some operations industries noted that they received more than one kind of funding; only one reported continuing funding support from government.

It is conservatively estimated that \$900,000 was received from all government sources. All other grant sources amount to approximately \$120,000, of which only about \$18,000 was provided by private business sponsors and individuals. Not all CEIC funding is included, in that it is directed to training for individuals and is not meant as assistance to operators.

3.0 INDUSTRIAL STRENGTHS AND CONSTRAINTS

3.1 General

Before proceeding to an examination of development opportunities available to the cultural industries, it is appropriate to review the strengths and constraints which may influence the degree to which opportunities within each sector may be exploited. During project research a high degree of similarity was found across all sectors in these respects, which greatly facilitated the analysis which follows in this Chapter. Additional information specific to individual sectors may be found in Volume 2.

3.2 Strengths

This first section will summarize general strengths upon which a developmental program for the cultural industries may be based. These are:

- . Core of professionals in each sector
- . Existence of a large tourism market
- . Festivals program
- . Brand-name recognition
- . Birthplace of Confederation theme
- . The Island as "island"
- . Export market orientation of the province
- . Presence of institutional support
- . Strong volunteer and public support

1) Professional Core

Each sector possesses a central core of professionals, supported in most cases by a number of serious amateurs seeking to become professionally involved. These persons have manifested a very strong commitment to their field of interest. In some cases

professionals also organize, administer and conduct performing arts classes or schools, or administer programs in a voluntary capacity as an extension of their professional commitment.

The Crafts sector has a formally established jury system, supported by a strong provincial association which promotes professional standards and quality production.

Three of the six art galleries also have formal jury systems for their shows. The province also has a high representation of visual artists, including many new residents attracted to the Island because of the nature of the environment as supportive of art production.

Film, video, and sound production companies are available to serve as a base for development efforts in their particular fields.

The Performing Arts have established a strong base in the Summer Festival; Theatre P.E.I. and the Regional Theatres, along with three theatre schools and a number of dance and music studios have developed strengths upon which expansion may be based.

In addition to its present resource base in the individual sectors, P.E.I. has also a number of established cultural traditions and legacies which give it standing in these fields. Its unique historical development, its internationally known personalities in the literary and performing arts, the Harris legacy in art and architecture, and its record in education all contribute to the cultural identity of the province upon which new efforts can be founded.

2) Tourism Market

Tourism is a continuously expanding industry on P.E.I., now representing approximately 700,000 visitors from mid-May to the end of October (1987 estimates), and about an additional 100,000 visitors in the off-season. The 1987 summer market represents an increase of about 6% over the 1986 figures. While average spending per capita is somewhat low at approximately \$25 per day, the total expenditure now represents an annual infusion of about \$85 million into the province's economy.

As indicated earlier in Section 2.7, project researchers were repeatedly advised of a growing interest among tourists for cultural experiences while holidaying on P.E.I., to learn what is unique about Island life, to hear Island music, to find Island art and crafts, and to visit Island theatre. Craft outlets advised of repeat visits by customers from earlier years and of new customers referred by word-of-mouth. This suggests that the new tourism market will be more interested in cultural experiences in future, and that passive beach experiences and observing scenic beauty will not suffice for holiday pleasures.

3) Festivals Program

Prince Edward Island has recently been recognized by the North American Bus Tour Association as offering three of the premier festivals and events in North America. Only nine such events were attributed to the Atlantic Provinces, with the Island's Summer Festival, Old Home Week, and the Acadian Festival being included among them. The Summer Festival operates throughout the peak tourism season and therefore represents a major anchor for an enriched festivals program throughout the province.

P.E.I. now offers many other summer festivals - 50 during 1987 - which have continued to draw large numbers of supporters from

Atlantic Canada and elsewhere. The Scottish Fiddle Festival at Rollo Bay, now in its tenth year, draws upwards of 10,000 fans each year; the Carlton West Music Festival draws more than one thousand people to its little publicized one-day musical event; the little known Old Home Week Square Dance Jamboree draws several hundred entrants each year, many from outside the province. These low-key events have shown surprising results, with little fanfare or promotion. They can provide a showcase for promotion of many of the cultural industries, if recognized for their full potential beyond local interest and support.

4) Brand Name Recognition

P.E.I. has achieved national and international recognition in potentially lucrative markets for certain of its products, particularly the writings of Lucy Maud Montgomery. The Anne of Green Gables television movies have expanded that potential market beyond the readership of the Montgomery books. The Anne musical comedy of the Summer Festival capitalizes on that market in an exemplary fashion. While a number of sources have expressed concern over supersaturation of the Island with the Anne of Green Gables theme, it does not make sense to dismiss a proven strength simply for the pursuit of novelty.

The Summer Festival, "Cavendish", and the Birthplace of Canada represent other brand-names which have achieved national and sometimes international recognition, and which help single out and attract a market for these industries.

5) Birthplace of Confederation Theme

Prince Edward Island is the Birthplace of Confederation. The program proposals in the recently-adopted report on developmental opportunities in the Birthplace of Canada theme have the potential to double the province's tourism market and attract

attention to P.E.I. as a very special place, of national importance.

The Heritage Report proposed the slogan: "1864 Belongs to Charlottetown". By this it was intended that P.E.I. should undertake to tell all Canadians, and all visitors, the full story of the times out of which Canada emerged as a nation. This can be told fully and in context only in Charlottetown. The presentation of that story, in its full dimension and its many forms, will require the presence and contribution of storytellers - the people in the cultural industries: the writers, artists, musicians, actors, dancers, film and video producers, and all of those engaged in the applied and technical arts. In fact, to the extent that the province fails to develop its full artistic and technical arts resources the full economic potential within the 1864 commemoration proposals cannot be realized.

6) The Island as "Island"

Islands as such represent places of special interest to many visitors, who look to them as self-contained societies in which traditional cultures are preserved. The Island's red clay, its geological formations and sandstone cliffs, its special flora and fauna, all mark it as a unique place whose cultural history and traditions should be expressed in equally unique ways.

This character as an Island, combined with its status as a self-governing province, places P.E.I. in a position of special market advantage over communities of similar size elsewhere. The Island is treasured by many visitors for its difference, and for the higher value it attaches to old ways and traditions. It has the latent capacity to attract an affluent class of tourist interested in the arts and in cultural experiences.

7) Export Market Orientation

Shipbuilding, agriculture, and the fisheries established Prince Edward Island's exporting tradition from the early decades of European settlement. The province trades in an international market in many of its products; its standing as a province facilitates entry into national markets within Canada. Export experience can be transferred to the cultural industries from other Island industries.

Other industries have been successful in the export market because they have determined its wants and needs, and have provided the market with a superior product, in quantity. Markets seldom search out suppliers, but in the case of the P.E.I. cultural industries it does so in large numbers, in the form of tourism. Tourism is a major strength to the cultural industries, if competently exploited.

8) Presence of Institutional Support

The presence of a university, technical college, major arts centre, heritage institutions, provincial and regional arts councils, and special interest groups in arts and culture represents a relatively rich bank of resources within a community of 125,000 people. Linked together in a mutually supportive manner, these institutions would have the capacity to reinforce the cultural industries, given an appropriate focal point around which their support can be provided.

9) Strong Volunteer and Public Support

Cultural and arts activities on P.E.I. have survived and grown on the strength of strong volunteer and citizen support. This support has not been converted to political advantage or effect, but nonetheless is evident in almost all sectors. Given more

effective vehicles for doing so, professionals who also serve as volunteers in sectoral organizations can provide support for industrial expansion in their fields of interest.

3.3 Constraints

Nine significant constraints on development have also been identified during project research. These include:

- . lack of industrial vision and leadership in most sectors
- . lack of corporate strength and resources
- . weak infrastructure support
- . insufficient resources for promotion and marketing
- . inadequate provision for training and development
- . programs and policies of government
- . lack of private sector involvement
- . present seasonality of market
- . lack of awareness of new technologies and applications

1) Lack of "Industrial Vision" and Leadership

As indicated in Chapter 2, the majority of producers within most sectors of the cultural industries are involved in informally structured one-person operations, and concentrate their efforts on the retail market. Only in the case of the larger corporate operations was a sense of "industry" and of export market awareness apparent.

It was not unusual to encounter one or more of the following views during project research:

- . a measure of distaste for the concept of "cultural industries" as well as for measuring their economic impact;

focus on art as a personal and private pursuit, rather than on the production of art works for sale;

stronger orientation towards public funding and grants than towards profitability and commercial viability;

perception of the cultural industries as limited by the size of the in-province market.

The foregoing factors are compounded by the mix of participants within each sector, as including professionals and semi-professionals, seriously committed amateurs, hobbyists, and volunteers.

A number of sectors rely heavily on the leadership and support of volunteers, who may on occasion receive part-time pay in return for almost full-time commitment. It is difficult to conceive of a substantial industrial effort being based primarily on the work of volunteers. The export market in any field is highly competitive; a stable and reliable external market cannot be established without the same degree of professionalism on the marketing side as exists on the production side.

Only the Craft Sector is organized to direct its own development as a serious industrial activity, including the promotion of professional standards of quantity production. Within this sector the P.E.I. Crafts Council has achieved the support of almost all craftspersons who are involved in production on a full-time basis, although these may involve less than 15% of all producers.

The lack of industrial organization in the remaining sectors precludes the emergence of a focal point for leadership in development, a situation which will seriously constrain progress if not adequately addressed.

Without such a focal point there is not a central depository of export or market intelligence where the results of market probes can be maintained. There are no inventories or registers of producers whereby the latter may be readily identified and brought together on matters of common interest, or for workshops and training sessions. There are few resource centres, and few initiatives by way of continuing professional development.

Related to this category of constraint is a definitional issue bearing on the concept of "cultural industries". The term embraces a range of activities which have little relationship to one another, except possibly in the background, cultural interests and temperaments of the producers; heritage institutions and sound productions, fine arts and video, festivals and literary arts, seem to belong in common categories only because it has been so declared.

It would seem appropriate to distinguish between art/arts education and arts activities for purposes of an industrial typology, and to delete arts education from the industrial category. It may also be appropriate to delete heritage institutions or museums from categorization as a cultural industry sector. A new typology should also clearly distinguish between cultural activities and cultural industries. The latter would then self-define as including only those who recognize themselves as being engaged in business as well as in the creation of cultural products.

2) Lack of Corporate Strength and Resources:

While there was explicit recognition in all sectors that cultural activities may constitute businesses, requiring business methods and following business principles, the majority of operators are not formally constituted as such. As indicated in Chapter 2,

almost 75% are unincorporated, the majority work alone on their own premises, and few use professional accounting methods.

Because of the large percentage of one-person operations, most sectors represent considerable individualistic activity, with low visibility and little opportunity for progression in industrial and technical skills within sectors. More than half of operators have been in production for less than ten years, indicating little opportunity for institutionalization of industrial knowledge and experience.

Further, because of the number of one-person operations it is difficult for these operations to contain all of the technical and managerial skills required in a successful business. They tend to emphasize production over business disciplines as being more important to survival, whereas a balance must be maintained. It will be necessary to counteract this prevailing situation if significant development of the individual sectors is to be achieved.

3) Weak Infrastructure Support:

In addition to the organizational weaknesses already identified, infrastructure support was also described as weak in most sectors. The following were cited as typical problems:

poor access to supplies at the price and level of quality desired. In many cases artists must purchase supplies at retail prices, and sometimes of a quality intended for hobbyists, or else must purchase from mainland (usually Halifax) suppliers.

poor technical support services; e.g print shop, instrument repair, sound studio, practice rooms, artifact restoration, small stage, etc.

lack of access to new technical advances, equipment, skills and applications;

The situation differs in each sector and hence needs to be addressed on a sectoral basis through some form of organization, which would also help promote linkages between sectors. For example, it was considered that festivals could be an even richer resource to the province if occasional professional support could be made to the individual volunteer sponsors in their organizational efforts, helping to link the festivals and appropriate arts activities.

4) Insufficient Attention to Market Expansion and Promotion

A number of sectoral spokespersons indicated that a major need is in the area of promotion and marketing, which they frequently cannot afford to undertake because of the small scale and low profit margin of their current operations and their lack of time for this function. It is their inability to market outside the province which inhibits growth and the presentation of new products. For example, there are no funds for galleries to sponsor out-of-region tours by Island artists, or for publishers to tour their authors or producers their musicians.

This lack of exposure to an outside market encourages the practice of producing for one's own tastes and interests rather than to satisfy market wants and preferences. Large scale production of quality products is appropriate industrial activity only if there is an identified market for those products.

Not only do individual operations have difficulty in becoming self-financing through sales revenues, they also have trouble in obtaining adequate external financing through lending institutions. Apart from low retained earnings, they do not have much by way of fixed assets with which to secure loans.

Commercial lenders consider that the cultural industries are in the high risk category; business prospects are difficult to assess, particularly in the case of expansion to new markets in which a sales record has yet to be established.

Undercapitalization has been a problem for many operators and has inhibited their ambitions for growth; their primary concerns often are more centered on business survival than on expanding their income base or venturing into fields representing new risks. Where there is a failure in development of new products, or the integration of new technologies, it is attributed by Island producers to their inability to maintain regular market contacts, and to know what trends are developing and what new products are coming into favour.

5) Inadequate Provision for Training and Development

A constantly repeated theme in project interviews was the failure of the school system to make adequate provision for arts education, either by way of generating a lasting appreciation of the place of cultural activities within communities in their own right, or suggesting to students possible careers in the cultural industries, at any level of involvement.

The limited provision for arts education in the school system has meant that interested parents must arrange for private tutoring in the arts or for attendance at privately operated schools and classes. This has resulted in a public perception of arts education as being elitist and restricted to those with ability to pay, regardless of interest and talent on the part of students who are excluded for financial reasons. This then mitigates against public support for arts education, which is perceived as something which can be afforded and obtained by those who truly want it.

Young people have continued to seek careers in cultural fields despite their under-promotion, and the relatively low levels of remuneration which they provide. Informants credited the present constraints on development as being the natural consequence of historic neglect within education, the low level of interest within the political level of government, and the inability of the sectors to advocate effectively in their own behalf.

One major constraint identified by spokespersons in several sectors, notably in visual arts and crafts, is the apparent program drift within the Holland College School of Visual Arts (SVA). There is concern over the future of the School, the adequacy of its present program offerings, the stability of its continuing industrial support program and community extension work. In the view of producers SVA should be drawing students from other provinces, but instead appears to be losing Island students to mainland schools for want of program strength. They believe that the present state of the school is a reflection of the low status attached to the cultural industries within government.

The weak Fine Arts component of the Education Program at the University of Prince Edward Island was also noted as a constraining factor in arts education, leading not only to a dearth of Island-trained art educators but also to a dearth of teachers in the school system with any degree of sensitivity to or understanding of the value of arts education within the school program.

Finally, all sectors noted the limited opportunities on P.E.I. for on-going or mid-career development for professionals in the arts and cultural fields, through workshops, seminars, sabbaticals, and exposure to the work and skills of masters.

6) Government Programs and Policies

Informants repeatedly stated that other major industries have achieved considerable support and understanding of their activities on the part of government, including the designation of well-resourced departments to promote their interests.

The cultural industries, on the other hand, have had a focal point within the Government of P.E.I. for less than eight years, and for most of that time by essentially a one-person office, located within a department whose primary orientation is towards programs not in any way related to cultural development. The Department of Industry has been making efforts only in the past two years to ensure that its programs accommodate some of the cultural industries, and is currently developing new policies covering selected areas. The observation has been made that there may be no more than 4-5 officials within all of the P.E.I. Government who have a depth of understanding of the issues involved in all of the sectors represented by this study.

It is a common view within all cultural sectors that at the provincial level, government appears to have signalled the priority assigned to these industries in a number of negative ways:

- . through a seven-year freeze on the grants funds allocated to the P.E.I. Council of the Arts;
- . through the termination of its Art Acquisition Program;
- . through the lack of provincial support to regional book publishing;
- . through the low state of visual art education in the schools;

through negligible funding for community museums;

through failure to include Crafts in the tourism marketing strategy;

through the apparent neglect of the School of Visual Arts.

These situations were not specifically attached to the present government, but to successive governments over the years. In a positive sense the present government has been given credit for its attention to the concerns of cultural interests, including its sponsorship of this present study. Credit was also given for the Cultural Products Development Program, with the reservation that the maximum allowable grant is too small to serve as a development incentive for new products. It primarily serves as a top-up fund, or to reduce risk exposure.

At the federal level three major problems were noted with respect to government policy:

- a) Changes in the focus of CEIC programs: Program changes in CEIC over the past ten years have seriously affected the crafts training program at SVA. Crafts training at one time was 100% funded by CEIC, with extension programs also being offered at various locations around the province. This source of funding for crafts training has almost completely disappeared, except in the case of persons who have been unemployed for 24 of the 30 months previous to applying for training.
- b) Technical requirements of federal government grants and contributions programs: Small firms on P.E.I. have professed weaknesses in acquiring the full range of business methods and techniques and in the application of management skills. While they may sympathize with federal agency

requirements for long-term business plans in conjunction with grant applications, it has proven difficult for them to prepare such plans in a form which is any way meaningful. Back-up data is difficult to obtain and they indicate that they require assistance or relief in conjunction with the grants application process.

- c) Program structure: Small operations consider that no matter what program structure is adopted, grants will always be more readily accessed by larger operations which have the resources to devote to that effort. These same operations also have the resources to devote to efforts to influence program changes. For these reasons several Island operators consider that federal government programs should recognize the great diversity in size within the cultural industries, and give special consideration to regional industries. The rationale for such consideration is the importance of regional industries within the context of a multicultural society.

In the absence of a regional office of the Department of Communications on Prince Edward Island, assured access to all available Federal cultural assistance programs was also described as problematic. It depends on the familiarity of the individual operator with the Federal Government's program structure, or on contacts already established within the system. A one-desk system of access to provincial and federal assistance programs by operators within this sector was perceived as necessary.

7) Lack of Private Sector Involvement

There is a substantial in-province market which appears to have been lost to the cultural industries. In various ways private institutions, major corporations, small enterprises, and private

individuals all make daily use of cultural products, the greater part of which is imported. This market has not well served Island producers, in part because of lack of recognition within the private sector of the excellent quality of local products and the degree of professionalism achieved by Island artists.

Throughout much of human history the arts have had to rely on the support of patrons: strong and wealthy personalities, even tyrants; the Church; public institutions; and major corporations. As each of these declined in the strength of available financial resources, their place has had to be taken by successor sponsors. The principal source of funds for the cultural industries in the present age is government, whether directly or through tax advantages to private contributors.

The pressure of duty on key opinion makers and persons of moral influence appears to have reduced time available for their personal support and endorsement for cultural activities within their communities. The greatly increased demands of public life, including much out-of-province travel, has deprived cultural activities of the influence which community leaders can exert on public opinion and on private sector support simply by their presence at performances, shows, and other events. There is a need now for encouragement of sponsorship support from the private sector to complement the assistance provided by Government.

8) Present Seasonality of the Market

In the absence of an export market orientation, the industries place a heavy reliance on the tourism market; thus their market has a very high degree of seasonality. However, that market has been extending itself into the Fall season in greater numbers, and efforts are now being made by the tourism industry to expand the Spring season as well.

Arts and cultural agencies do not have a strong presence or voice within the tourism industry and this situation needs to be addressed. To the extent that tourism represents an important market segment for the cultural industries, the latter should be involved in encouraging and assisting in its expansion.

9) Limited Application of New Technologies and Applications

The study terms of reference required that the Project Team examine possible application of new technologies to production within cultural industries. Project research found that with few exceptions there was a very limited interest in the application of new technologies to the fields of activity covered by the study; where there was of awareness of possible technological advances, it was considered that the needs of the present market for Island products could be met with existing technology.

In most situations it would appear that operators were either too small or too undercapitalized to take significant advantage of new developments in their fields. Dance studios, for example, expressed a desire for new sound and video systems, as being invaluable resources which they could not afford. Artists sought print-making capability which is not available here. It is likely that new high-resolution video cameras will replace existing equipment, and may even make video competitive with film products, which will require new capital investments if Island firms are to remain competitive.

The present level of awareness of technological development affirms the value of regional seminars and conferences such as the annual conference of Atlantic Provinces Independent Film Producers held in Charlottetown each June, where small operators can offset their limited exposure to state-of-the-art developments in their respective fields.

4.0 OPPORTUNITIES IN THE CULTURAL INDUSTRIES

4.1 General

A brief analysis of economic growth processes and mechanisms favored by the Project Team is contained in Appendix 5. This chapter will examine market opportunities for the cultural industries in light of the preferred economic growth mechanisms identified in that Appendix.

Expansion of opportunities within any industry conventionally depends upon its ability to develop and exploit an export market, or to replace imports in meeting local market needs. An industry which relies entirely on local markets is limited in its growth potential by the size of that market. Expansion can then be realized in one of four ways:

- 1) through emphasis on import replacement, using locally produced products and services;
- 2) through an increase in the purchasing power (disposable income) of the local market;
- 3) by capturing market shares held by competing suppliers;
- 4) by obtaining income from other than market sources.

The small size of the local P.E.I. market presents difficulties for any industry seeking to exploit opportunities in that market alone. Its 125,000 residents represent the total indigenous market for all purposes; all suppliers are competitors within that market.



The resident market is augmented by tourism, whose approximately 300,000 visitors spent about \$85 million while on the Island. This represents a considerable infusion into the local economy, which is yet capable of further expansion. The tourism market must be assiduously promoted in order to expand the opportunities which it contains.

The external export market on the other hand, is of indefinite dimension; it is limited only by the ability of industrial interests to export on a national or international level. Both levels are open to certain of the cultural industries, although most operators will experience export disadvantages by reason of size and location.

Ordinary market rules do not apply to the cultural industries in the same way as they apply to conventional industries. Unlike many other products, cultural products serve as an expression of the human and aesthetic values of a people, and are intricately related to their life styles and quality of life. For this reason it has been traditional for market sources to be supplemented by the contributions of patrons, in order to enable all members of the community to share in some way in the enjoyment of cultural products and services. In this examination of opportunities, therefore, it must be assumed that non-market subsidies will continue to be provided, whether by Governments, Foundations, corporations, small businesses, or by private individuals.

It should be noted that the cultural industries represent activities which respond to an almost inexhaustible appetite for quality in our lives, for lively colour and design, for entertainment and distraction, for stories and story telling, and for artifacts and activities which give meaning to community life and heritage. In that light the markets which we identify here are probably of much greater dimension than our text would

suggest. Our caution in the following sections is borne out of our awareness of the difficulties of reaching and developing new and distant markets, in the absence of established contacts and an established presence in those markets.

Exhibit 4.1 identifies the market segments which offer growth possibilities for the various industrial sectors.

EXHIBIT 4.1 Areas for Market Expansion, by Sector

SECTOR	MARKET		
	DOMESTIC	TOURISM	EXPORT
Arts Education	* *		*
Heritage Institutions	* *	* *	
Performing Arts	* *	* *	*
Visual Arts	* *	* *	*
Festivals	* *	* *	
Crafts	*	* *	*
Sound Recording	*	*	* *
Film and Video	*		* *
Literary Arts		*	* *

* - limited room for expansion of market

** - significant room for expansion

4.2 The Paradigm

Charlottetown's Summer Festival, with its central attraction, the Anne of Green Gables musical comedy, represents a most practical demonstration of the development potential within the cultural industries. Addressed only to an Island market, Anne of Green Gables could not have survived as it has done for twenty-three years; however when it was prepared professionally as a major tourism product and presented to that market in the context of the Summer Festival, its market was immediately expanded. When the Anne production was later taken on a national tour, its market opportunities again increased multifold. Ticket receipts from the national Anne Tour in 1986-87, for example, exceeded the 1986 Summer Festival receipts by approximately \$200,000. Then when Anne was a proven product, it was made into a television film for presentation to an international market.

What Anne represents, in both its stage and film versions, is:

- . a combination of the literary and performing arts in the production of a major theatrical product;
- . subsequently, a combined product of the performing, visual applied, and technical arts to produce the film version;
- . through both the stage and television productions, employment opportunities were created for performers, crew, technical, and production staff;
- . spin-off employment opportunities were created deriving from the popularity of Anne and the Summer Festival;

This example is cited here for four reasons:

- 1) Anne is both an export product and income replacement product, while also serving a domestic market. Thus Anne of Green Gables serves as an excellent example of the how the cultural industries may interact with an economy, at three market levels.
- 2) At the same time, despite its almost \$4 million in total ticket revenues in 1986-87, the Summer Festival could not have been offered without generous subsidies to its producing organization by the three levels of government, and by private donors. This same situation affects a number of the cultural industries, where the tradition of sponsorships and subsidies has established a level of pricing which the general public is prepared to bear in support of cultural products.¹ (We shall observe on the "market failure" factor in the next chapter.)
- 3) A third lesson from this example is that although Anne and the Summer Festival together represent the successful exploitation of an opportunity they also represents a failure to exploit the full potential for spin-off product development. To a large extent these have been developed as stand-alone enterprises, to be managed and nurtured within the Confederation Centre of the Arts without integration into the full cultural effort of the province. This represents a wasted opportunity for full exploitation of an internationally recognized Island brand name, for reasons usually expressed in terms of "Anne saturation".

¹One source noted that even this level of pricing excludes many people - adults and children - from participating in cultural experiences which are important for their complete formation; to reach families with low incomes even greater subsidies would be required.

- 4) The Festival and Anne both convey a special lesson about marketing. It is not sufficient to develop a product - the product must be promoted, packaged successfully for market, and finally sold.

One survey conducted last summer showed that almost 30% of non-resident patrons were from Ontario, against 18% share of the province's tourists who are from Ontario.

New Brunswick, on the other hand, which represents 23% of P.E.I. tourism, provided only 14% of the non-resident patrons in that survey. Nova Scotia's 30% of the tourism market provided 23% of festival patrons. Thus there are further marketing opportunities in the Anne story.

The presentation of the following market analysis is made with this practical illustrations in mind. Markets seldom happen - they are created.

4.3 Domestic Market

The domestic market on P.E.I. can become quickly saturated by any product. There is a limit to the extent which it may absorb specialty products in any field. Any expansion in one product line may then be offset by the simultaneous contraction of another. In our judgement this severely limits possible expansion of the cultural industries within the domestic P.E.I. market, as in the case of any domestic oriented product.

The significant opportunities within the domestic market are in five sectors. Of these, Arts Education and Heritage Institutions primarily involves expansion within the educational system, and thus the transfer of resources from one sector to another. Expansion of these sectors does not translate into an immediate economic opportunity for Prince Edward Island; rather it

represents an investment in long-term development of the cultural resources of the province and the encouragement of new producers, as well as providing greater diversity within the education of students.

Heritage Institutions are important for reasons unrelated to tourism or an export market. They are the vehicle for the preservation of important aspects of Island history, culture, and traditions. Their task is to present to Islanders and visitors alike the continuing story of the province's historic development, and to ensure an understanding of the present in the light of what has gone before. All Islanders are their market, but the most important domestic market segment for Heritage Institutions is the school population.

A complete Arts Education program is one of the first means whereby students may be introduced to career opportunities which might otherwise remain closed to them. An example cited in the survey was the effect of student participation in High School drama performances. Career possibilities which such experiences suggest to students include those related to "front of house", (management, administration, public relations, marketing,) back stage or "crew" functions, (stage construction, costuming, design, lighting, sound,) in addition to the "on stage" or performing roles, (music, dance, and drama.) Thus a single school cultural activity can suggest a lengthy array of career options in a more significant way than career manuals could ever hope to do.

Similar results have been attributed to education in the visual arts where it has been made available, that is, in suggesting careers in such fields as painting, drawing, print making, graphics, commercial design, and other practical applications of visual art training. Likewise with music education and the literary arts.

While the foregoing examples do not provide immediate economic impact, except with reference to job opportunities for arts educators in the schools, they are an important step in the development of replacement talent for the cultural industries, which will be necessary if there is to be an expansion of provincial effort in these fields. It was noted that the present level of artistic effort in the province has been achieved without significant encouragement on the part of school administrations, without any substantial amount of public recognition and support, and with only minimal government assistance. Given greater support, P.E.I. could dramatically enrich its cultural industry base within ten years.

On the other hand, without a greater educational effort P.E.I. will not be able to maintain the recruitment of new people to the various sectors, which is a necessary precondition to growth and expansion. An instance was cited of one course offered by Prince of Wales College (predecessor to Holland College) to a small class of students during only one year in the late 1960's which produced three successful and still active film-makers; a second instance cited was that of one art teacher in one rural school whose encouragement and support resulted in several young Island artists making a career commitment to painting and the visual arts. Without some such kind of effort on a continuing basis the development of the cultural industries will be left to chance.

It was observed in the course of project research that in almost all fields of cultural endeavour on Prince Edward Island, professional leadership is being provided by people whose early education and training and beginning professional experience was acquired elsewhere. Without a greatly enriched arts education program, Prince Edward Island will continue to depend on other parts of Canada to provide the professional resources it will require to maintain an industrial level of effort in cultural fields.

In the case of the Visual Arts, expansion of the domestic market represents an import replacement opportunity, rather than the transfer of market segments from other domestic products or services. There are many opportunities for the replacement of inferior imported products in public, commercial, and private buildings with the works of Island artists. There are also opportunities for new product development, such as print-making, and for enhancing the value of established products through greater in-province promotion.

There are also possibilities for domestic market expansion in both the Performing Arts and the Festivals sectors. Festivals have been promoted regionally for the most part and despite their popularity among the established clientele, they have not realized their full potential as provincial celebrations. In some cases, even with their present clientele they have outgrown their facilities, as in the case of the Acadian Festival in the Evangeline area and the Rollo Bay Scottish Fiddle Festival. Evidently, there is a great potential to increase the attraction for Island residents.

Similarly, although the domestic market for regional theatre and Theatre P.E.I. productions has been relatively light in recent years, a more intense marketing effort could generate greater audience support. The professionalism within such productions has not been fully recognized among the domestic Island market, possibly having been equated with amateur community theatre of times past.

Regional theatre should not have to depend on tourism for its survival, given a balanced program offering and a strong promotion, especially in view of its competitive position with admission fees to movie theatres and like attractions. Improved marketing beyond the posting of waybills and public service announcements seem indicated, particularly through using street

theatre where crowds gather, or demonstrations in local parades and festivals. Theatrical groups could help regional festivals in their programming efforts, and would be greatly welcomed by festival promoters.

4.4 Tourism

We have already indicated the potential for the cultural industries in a more effectively developed tourism market. Five sectors have opportunities in the anticipated tourism expansion, while simultaneously making a contribution to that expansion.

Heritage Institutions, as we shall later suggest, are the natural focal points for visitors wishing to acquire information about any aspect of Island history. To realize their potential in this role will require the designation of at least one year-round core institution in each region, having full-time qualified staff, whose assignments should include assisting satellite museums in improving the quality of their presentations and their drawing power.

The Performing and Visual Arts will also find expanded markets in expanded tourism, if they can establish themselves in a position to access it. The Visual Arts in particular require greater visibility, improved presentation, and stronger promotion so that visitors may be aware of and readily locate them. The Performing Arts could benefit from improved linkages with the Summer Festival, where standards warrant. Le Village Pionnier Acadien has demonstrated the impact of dinner theatre on tourism within a cultural context, and this example should not be lost on Performing Arts interests.

In the case of Crafts, the major Crafts Council outlet advised that its supply of popular lines was exhausted before the tourism season ended, which was cited as evidence of failure to estimate

the strength of this market and to capitalize fully on it. The Crafts sector needs to be exploring new market tastes and interests, and should also be paying constant attention to new products and specific Island designs. A market cannot be maintained in tourism by continuous repetition of last year's products.

We believe also that the Festivals sector could greatly increase its impact on tourism. For the most part festivals are organized and conducted by volunteers, as non-profit ventures. On the other hand, the internationally recognized festivals -- strong drawing cards for the province -- are all professionally organized and directed. All festivals represent an easy and readily available market for those sectors of the cultural industries which have portable products, including the performing arts, visual arts, crafts, and sound recording. There are evident opportunities to improve the power of festivals within the tourism market, beginning with the provision of professional support to the volunteer festival organizers.

4.5 Export Market

Export is the market of greatest opportunity, but also the market which is most difficult to penetrate. While of indefinite size, it must be selectively addressed, and effectively promoted and exploited. All sectors except Heritage Institutions and Festivals have access to this market.

Arts Education can expand into the export market through a restructured technical training program at Holland College, following the example of the Culinary Institute, as well as through enrichment of summer programs, regional seminars and conferences, and other special interest events. This will involve a possible reorganization and consolidation of the program offerings within the School of Visual Arts. (namely,

visual arts, photography, and commercial design,) and the expansion of the School to include an off-Island market. Changes seem necessary to increase the student base of the school, improve its viability, and permit it to strengthen present programs and courses.

The Visual Arts and Crafts sectors should now be examining new ventures into the export market, based on the growing reputation of the province for quality work in both fields. Several craft producers are now exporting their products, one having established a studio production line which is currently supplying major retail firms in Canada.

In the case of Sound Recording, Film and Video, and Literary Arts, the market is quite substantial and requires marketing effectiveness as much as quality product. Spokespersons for each of these sectors stated that they have confidence in their ability to prepare products that are acceptable to a national or even international market. Sound Production interests consider that there is a market in New England and elsewhere in the Atlantic Provinces for the kind of traditional music played on P.E.I.. Film and video producers state that the necessary skills are here to produce for national television and the National Film Board, and one operation has produced pilots for a proposed television serial.

Beyond tourism and the random visits to P.E.I. which that industry represents, there is an opportunity for increasing product-oriented visits to Prince Edward Island by developing the province's potential as an Arts Centre within the Atlantic Region.

As we have indicated in Section 3.2 (7), Prince Edward Island has a number of strong or potentially strong institutional resources deriving from its standing as a province. In addition to the

strengths listed in the referenced section, the province possesses a major draw in its excellent heritage buildings, including Government House and Province House, and its great churches. It has outstanding architecture throughout the province, and it has six Regional Arts Councils organized to promote the arts in their various communities.

In addition, the Island has a growing reputation for the quality of its crafts and the work of its visual artists. Island musicians have achieved well at the national and even international level - two rock music bands having achieved awards at a music festival in Japan during 1987. Island theatre has been progressively improving its performance and its market over the past several years.

This reputation provides an opportunity for the organization of special attractions targeted to specific groups in the literary, performing, visual, and applied arts. Project researchers were told that in all of the cultural sectors, artists need exposure beyond their own communities; they need to meet and interact with others of their kind; they need a chance to show and perform, and to develop their skills and techniques through the guidance of masters within their various fields.

This market is being courted by other provinces, but not in an aggressive and well organized fashion. We believe that by establishing itself as an "arts centre", P.E.I. would greatly improve the marketability of its cultural products in an export market, and would also contribute to the courage of its residents in accessing that market. This could be achieved through the holding of seminars, conferences, workshops, meetings, and performances of regional interest which could be sponsored by any of the organizations identified above, including a restructured and more richly funded P.E.I. Council of the Arts.

4.6 The Exporters

The expressions of confidence in the ability of the Island's cultural industries to capitalize on an export market are made notwithstanding the small number of persons in those industries who have acquired export experience to date, and the absence of vehicles for helping other producers to acquire facility in the export field.

However, we have indicated earlier that this province has a long export tradition, beginning with its earliest settlers and the shipbuilding trade, and later with fisheries and agricultural products, and later still with manufactured goods. There is no question of the province's competence and competitiveness in the export market, nor that these qualities can be transferred to the cultural industries.

A skills base has been established in most sectors upon which an export capability can be built, given the provision of an appropriate vehicle for doing so and incentives for taking on the challenge of opening up new markets for Island products.

5.0 STRATEGY FOR DEVELOPMENT

5.1 General

A development strategy provides for a concentration of corporate effort on pre-determined objectives. In the absence of objectives it would seem presumptuous to propose strategies. For that reason we are proposing only elements which may be usefully considered in the eventual development of a strategy, once objectives are put in place.

Although each of the cultural sectors is unique in itself and requires a strategy specific to its own needs, their present level of development is such that there are a number of common proposals which will serve their purposes.

For that reason this chapter will be in two parts:

- . Section 5.2 which follows will contain elements of a cultural industries development strategy for the consideration of government, with respect to the industries as a whole;
- . Section 5.3 will then suggest the basis for strategies within sectors should organizations emerge to adopt them.

The strategies proposed will reflect a four-fold awareness:

- . The concept of "industry" involves the production of goods or services to serve the needs of an identified clientele, as distinct from an activity carried out for its own sake or without reference to a known market.
- . Industrial growth requires some form of supporting infrastructure.

Industries are driven by individual entrepreneurs who have the skills required to attract and retain customer/consumer support.

Industrial growth depends on continuous market expansion.

5.2 Elements of an Industrial Strategy for Government

We propose eight core components of a strategy for government initiatives in cultural industries development.

recognition by government that the cultural industries make a significant contribution to the economy of the province and to the quality of social life;

redefinition of the concept and scope of the "cultural industries" for purposes of policy development;

improved and targeted marketing as the key to growth in these industries;

a provincial cultural products marketing effort based on brand-name recognition;

incentives for entrepreneurial development within each sector, including encouragement of infrastructure support;

enriched program funding in support of marketing, product development, and training;

interim support for sectoral organization;

new emphasis on education and training for the cultural industries.

5.2.1 Recognition by Government

We have established in Chapter 2 the economic impact of the cultural industries, as defined for purposes of this project.

.	\$35.275M	gross sales
.	3,205	jobs
.	1,080	person-years of employment

These activities also produce a measure of taxation revenue to government, which we have not attempted to calculate. As we have indicated in our introductory chapter, these impacts are deliberately understated, because of exclusions resulting from the definitions used, and because of the incomplete state of the industrial inventories. Thus, these industries make a significant, and possibly under-recognized, contribution to the province's economy.

Beyond their economic impact, the cultural industries also contribute in major ways to the enrichment of Island communities. They create a diversity within community activity which adds to personal enjoyment and the character of Island life. They help create a social environment which is not only attractive to the tourism market, but which also attracts foot-loose businesses seeking areas in which to locate. Family heads in such situations look for opportunities and amenities for the full development of their children, and adults seek opportunities to satisfy their own interests and tastes. Thus cultural activities have primary social effects which are important to communities, even without consideration of economic impacts.

The cultural industries do not of themselves distinguish people by class, nor do they create an aristocracy of taste. These effects occur as a result of the absence of sponsors or patrons, when cultural interests find that they must direct their efforts

to those with the ability to pay. The province can help re-establish popular access to cultural activities on the part of all Island residents by recognizing both their social and economic significance within government program and funding priorities.

5.2.2 Redefinition of the Cultural Industries

The definition of the cultural industries used for this study, itself derived from Statistics Canada definitions, is excessively broad for program purposes. Activities are included which relate to one another only by reason of being included in the inventory.

Statistics Canada, for instance, included the following types of activities in its report summary on government expenditures on culture in Canada in 1985-86.

- . National, public, school, college and university libraries
- . Museums
- . Public archives
- . Historic Parks and Sites
- . Nature/Provincial Parks
- . Other heritage institutions and activities
- . Arts education
- . Literary arts
- . Performing arts
- . Visual arts and crafts
- . Film and video
- . Broadcasting
- . Sound recording
- . Multiculturalism
- . Multidisciplinary activities, (e.g. festivals. exchange program, arts organizations, etc.)

For P.E.I. Government purposes, the definition must be much more discrete. The concept "cultural industries" should distinguish between activities which are clearly educational and archival in nature, as distinct from those which are directed to the production of goods and services in the private sector for public consumption.

Thus, for example, such activities as arts education and heritage institutions would not fall within the cultural industries for P.E.I. Government purposes, nor would activities carried out entirely by government or within educational institutions.

A new typology should also distinguish between cultural activities, such as volunteer community choirs, concerts and amateur theatre on the one hand, and cultural industries, such as film and record production and book publishing, on the other.

Finally, it should also distinguish between professionals who are committed to full-time production, serious amateurs who are aspiring to be engaged in production on a full-time basis, and hobbyists who produce sporadically and to satisfy personal rather than market needs.

Government funding programs for the cultural industries could then be directed to specific levels according to its purposes.

5.2.3 Marketing as the Key to Growth

Chapter 4 emphasized the importance of exploiting the various market segments which are available to the cultural industries. Of those, the domestic market is the least productive but easiest accessed, the tourism market is the easiest promoted and most alluring, and the export market is potentially the most expansive.

As we have seen in Chapter 2, most operators are informally organized and do not have the time or resources to devote to marketing and promotion. In that respect they are very much in the position of the tourism industry of twenty years ago, before the P.E.I.'s Comprehensive Development Plan strengthened it and prepared it for its present position in the Island economy.

The cultural industries are now in a position similar to tourism of 20 years ago, poised for growth but without the means for growing. Thus government policy needs to make provision for marketing assistance as the key to cultural industry growth, in all sectors.

5.2.4 Brand-Name Recognition

As indicated in Chapter 4, P.E.I. has a number of "brand-name" cultural products which people must come here to enjoy.

- . Anne of Green Gables
- . The Birthplace of Confederation
- . The major festivals

Other "brand-names" which are instantly identified with this province are Cavendish, Red Clay, Island Potatoes, Malpeque Oysters, Lobster Suppers and Abegweit.

Places become known by the singular events or personalities which become attached to them. The cultural industries should be encouraged to capitalize to the fullest extent possible on established brand-names, while continuing to develop lesser known personalities and events which have excellent potential for targeted audiences, (e.g. Samuel Holland, the Harris family, Hache-Gallant, and the Acadian experience, the Lottery, the Loyalists, and so on.)

5.2.5 Incentives for Entrepreneurial Development

As in other sectors of the economy, development follows upon the work of lead entrepreneurs, the innovative and path-making venturers who search out new resources, develop new products, find new markets, and generate the productive enterprises that constitute an economy. Not everyone has the audacity and courage to engage in an export market, and those who attempt it are deserving of the full support of their peers in their efforts.

For the cultural industries to achieve their full potential the same entrepreneurial leadership will be required -- people who blend cultural and artistic sensitivity and creativity with sound business principles and practices.

In all sectors operators are becoming aware of the need to improve their business skills, but frequently express the lack of opportunity for doing so within the context of their specific field. There is a need for business training programs specific to the needs of these industries, possibly in conjunction with the Holland College technical training programs, preferably to be implemented on-site in the case of major producers.

It is also important to consider the infrastructure support needs of operators in the various sectors, and to examine means for meeting those needs which are essential to industrial success, such as in the case of producers having to purchase supplies from hobby shops at retail prices.

Finally, there is a need to encourage the emergence of an "industrial vision" among producers, a perception of what it is possible to achieve through quality production for an export market. The development of industrial vision is entirely pragmatic, following upon an examination of the export market and opportunities for Island producers to compete within it. It

cannot be acquired by staying at home, but only by being present where the market exists, and by making one's productive capacity known and guaranteeing a regular supply within that market.

5.2.6 Enriched Program Funding

In the absence of a growing economy, new money for enrichment of program funding in one sector of government can be made available only at a cost to other sectors. Since existing programs have their established clients and special interest support, it is not a simple thing to divert funds from them.

However, the same has already been made within government for program turnover, and the public has become conditioned to the curtailment of one program in order to provide funds for another. This is especially important in the case of funding for new development initiatives, such as Federal-Provincial ERDA Agreements, where industries may have to take their turn in accessing development funds.

Cultural programs now requiring enriched funding include:

- . Cultural Products Development Fund
- . Council of the Arts for organizational support and development
- . Heritage institutions/museums
- . Theatre P.E.I. and Regional Theatres
- . Arts education
- . School of Visual Arts
- . Arts Assistance Grants
- . Festivals program
- . Marketing assistance
- . Business development assistance

Further comment on these needs will be provided in the next chapter.

5.2.7 Organizational Support

One of the most important of the strategic elements is the creation of an organization dedicated to the development of the cultural industries as such, as distinct from the promotion of the arts and arts activities for their own sake.

While it would not be possible for government to create such an organization, there are indications that the P.E.I. Council of the Arts is prepared to restructure itself to this end, with an orientation towards encouraging production and marketing as well as supporting the emergence of individual artists.

This could be achieved by creating the Council as a federation of regional and discipline groups, with the latter pursuing sectoral interests, regional councils promoting the arts generally, and the Council serving only its member associations in an executive support capacity. Its present Art Assistance Grants Program could then be disbanded, or provided through an associate commission.

If the Council is willing to follow this course, government should provide it with assured funding for a 3-5 year period to restructure itself, such as has been done from time to time with other industrial groups and organizations.

5.2.8 Education and Training

To a large extent, and with few exceptions, professional leadership within the cultural industries is provided by Island residents who moved to the province as adults, having received their arts education and technical training elsewhere. If the province is to commit itself to the development of the cultural

industries, it cannot rely on other provinces and countries to attend to its need for artists, and performers, and writers, and for cultural industry leadership.

Thus an important strategic element is a restructuring of arts education:

- . in primary and secondary school, with new provision for arts education at all levels;
- . within the University of P.E.I., emphasizing Fine Arts within its Education Program;
- . within the Holland College Schools of Visual Arts;
- . through continuing (mid-career) education and upgrading programs.

These do not require dramatic changes or major new public investments, but rather an improved understanding of and new support for arts education within all education programs.

5.3 Sectoral Strategies

As in the case of government, we do not propose here a single strategy for industrial development but rather a number of elements which should be included in any strategic plan for the industrial sectors.

The elements proposed here will differ only in their application to the various sectors, and in the action plans necessary to give effect to them.

The elements of the sectoral strategies are as follows:

- . establish some form of industrial organization in each sector, representative of at least the major producers;
- . position each sectoral organization in a way that will enable it to influence growth and development;
- . promote professionalism among producers, leading to greater full-time participation in quality production;
- . emphasize maximum feasible penetration of all available and accessible markets;
- . promotion of business principles and methods among individual operators;
- . develop infrastructure in support of production;
- . initiate public awareness programs.

5.3.1 Sectoral Organization

The case for sectoral organization in some form has been presented earlier. While such organization is not a pre-condition to the expansion of individual operations, including to export markets, it is almost a precondition for strengthening each of the sectors as such. The present levels of activity have been achieved without substantial organization, but new growth and expansion will require a concentration of effort in order to deal effectively with each of the constraints identified in Chapter 3. Sectoral organization may not be possible in all sectors, such as in Sound Production, or Film and Video, where there are only a small number of operations; in those sectors individual effort will have to be encouraged directly.

In most cases some central body is required in order to provide a focal point for developmental efforts. The Crafts sector now has an established organization which holds two general membership meetings per year, but which does not yet have the capacity to deal with major issues, such as wholesaling supplies, developing export markets, extending its membership base, extending its influence to the tourism industry, and so on. Other sectors have yet to reach the stage of development that the Crafts have attained. Support needs to be provided for leadership in each sector to emerge with organizational support.

5.3.2. Positioning of Sectoral Organizations

Sectoral organizations, once established, need to develop individual strategies and action plans directed to the growth and development of their sectors. Activities should be directed towards ensuring that:

- . the support of key operators is secured
- . key linkages are established within relevant Government agencies at the highest possible level of influence
- . major market opportunities are identified and means designed for exploiting them
- . producer support is secured for promotional and marketing endeavors
- . means are established for encouraging full-time professional participation in the sector
- . professional standards are adopted

linkages with directly related sectors are established and maintained, particularly with the Government funding agencies and with the P.E.I. tourism industry.

Sectoral organizations must establish a strong identification as action-oriented bodies, all of whose work should be as productive at meetings as it must be in the studios they represent. They should adopt direct problem-solving methods, seeking assistance promptly in disposing of issues which prove vexatious to them.

5.3.3. Professionalism of Producers

As indicated above, sectoral organizations should assist and encourage artist/producers in committing themselves full-time to their art, encouraging quality production in sufficient volume to enable the producers to be self-supporting. This will require the identification and exploitation of all possible market sources, as well as all forms of public support or assistance that will provide supplementary income during the period while a market niche is being created which warrants full-time professional commitment.

It is difficult to consider the development of any industry without a strong core of active professionals who are committed to their industry on a full-time continuing basis. This does not argue against the seasonality of sales, which is a characteristic of most Island industries; it does argue for maximum possible development of each market segment during its particular time period, which requires having sufficient product prepared for those times when the market is most active.

5.3.4. Maximum Market Penetration

Marketing is accepted as the key to industrial growth, and has to be pursued at all levels, within all market segments, and in as

wide a geographical area as possible. Because of the scale of operation in most sectors, no individual operator will have the resources to explore new markets in any depth; this suggests the need for collective action, and government marketing assistance should encourage development in that direction.

For example, with the Autumn tourism market growing each year there could be agreement among major craft operators that their workshops will remain open for Fall visitors. They could then encourage late season tourists in an on-site "tour of Island crafts"; such an event, if found desirable, would not be likely to develop spontaneously without a special marketing effort in that direction.

The cultural industries are poorly represented within the tourism industry, which is presently heavily oriented towards hotel-motel operators, resorts, attractions, and specialty retail shops. Since the tourism market is of special importance to the cultural sectors, the organizations proposed in Section 5.3.1 above should ensure that they are represented and participating in efforts to expand the tourism season.

5.3.5 Promotion of Business Principles and Methods

While it is not conventional to think of the arts and business as related terms, wherever goods and services are being sold the vendor is in business. In that event the artist as producer would be well advised to adopt similar business principles and methods to those that have enabled conventional businesses to survive and prosper.

Because many operations in the cultural industries are one-person efforts, frequently carried out on a part-time basis and at home, it may be necessary to custom-design business methods for application to small-scale operations. Operators need to be

encouraged to think in terms of sales and profits as well as in artistic terms, and should also consider appropriate pricing for the value-added components of all goods.

There is a need for sectoral organization to promote a new way of business thinking among all producers, and to avoid continuation of the under-pricing of goods and services which has been to the disadvantage of whole industries.

5.3.6. Infrastructure Development

There are infrastructure problems within most of industries which can only be addressed when there is an opportunity for the summing of needs and the clear identification of real support requirements. Some of these needs were identified in the course of the study but they may not be amenable to correction, such as instrument supply and repair in the performing arts sector, or the wholesaling of supplies for the visual arts. Whatever requirements there are for infrastructure support will only be satisfied through some form of collective action, carried on through an organizational base.

5.3.7 Public Awareness Program

All sectors require improved public awareness programs to encourage a greater measure of appreciation for the quality and range of work done by Island artists, craftspersons, performers, and others. Just as the annual crafts shows throughout the province have helped expose Island residents to the quality of crafts produced here, an annual Art Festival could do the same for the visual arts; community festivals can also be used to great advantage for this purpose, by all sectors. Street theatre can serve as an introduction to regional theatre, and so on throughout the sectors.

What is important is that there be developed within each sector an appreciation of the importance of product identification and product promotion with each of the market segments. Given the variety of choices available to the public, the domestic market must be as assiduously courted and promoted as any other market. The fact that the general public may not support a given activity or product does not necessarily mean that they do not consider it important; it may simply mean that the product did not enter their realm of choice.

5.4 Relative Roles in Development

There is a need to reach agreement on and define the relative roles of various actors in relation to the cultural industries:

- . education
- . artist/producer
- . the industrial sector
- . government
- . public institutions
- . individual citizens

Without an understanding of roles, it is possible for each element to wait upon others to initiate development activities without doing their own work. There are activity voids now at all levels, chiefly because there is no "transforming core" within each of the sectors to ensure that all elements are active in their roles, and that their efforts are coordinated or directed to some common purpose.

- . schools, university and technical colleges must continue to supply artist/producers, and to develop an interest in quality cultural products;

artist/producers must study market needs and produce for that market quality products, in volume, using standard business methods;

each industrial sector must work collectively to ensure that major markets are identified and accessed, and that producers are alerted to potential new markets;

government must ensure that industrial incentive and promotional programs are equally as available to cultural as to other industries;

public institutions must provide a supportive environment for the cultural industries, as in the case of other industries within the community;

individual citizens must assist through giving fair consideration to P.E.I. products in their consumption of cultural goods.

6.0 POLICY PROPOSALS

6.1 General

In addressing the need for public action in support of culture, the 1982 Report of the Applebaum-Hebert Commission on Federal Cultural Policy dismissed a number of economic justifications for government intervention to increase the flow of resources to cultural activity, but addressed in some detail the issue of "market failure". Market failure is recognized in the case of the longevity of certain cultural goods whose value increases over centuries, far beyond the initial price attached to them or the ability of the market to measure the value of their lasting benefits.

A second example of market failure flows from the temporary inability of people to avail themselves immediately of a cultural event, but who wish to retain the option of doing so even at some cost. Intervention from outside the market may be necessary to allocate resources reflecting latent demand, in order to make the event possible. Another example is where cultural creations are so freely accessible to those who take pleasure in them that the market can not recover the cost of creation from those who benefit.

A further example of market failure is in the historic failure of pricing mechanisms to reflect fully the cost of cultural activities or goods. This may be because contributions from patrons or other forms of subsidies in the past have maintained prices at artificially low levels, and when these subsidies are withdrawn or reduced the market cannot adjust appropriately.

The Applebaum-Hebert Report recognized the market failure arguments for government intervention to increase the flow of resources to cultural activity, but posed two questions:

- . how much is necessary to remedy market failure?
- . where should additional resources be directed?

They suggested that "only a judgement that is both intuitive and prophetic will serve" and that "in the end, the economists can tell us only that an act of faith -- and judgement -- is required." They added that "however well-intentioned and well-informed, no single source of resources can be infallible as judge and prophet" and that "resources should flow to cultural activities from a multiplicity of sources, each guided by its own judgement of needs."

While the market failure argument has been used by other authorities as justification for government intervention in support of the cultural industries, we would cite other more intrinsic reasons for doing so, including:

- . the high level of economic activity generated in the province by the cultural industries;
- . the important contribution which the cultural industries make to Island tourism;
- . the value of the cultural industries in relation to quality-of-life considerations, as evident from their all-pervading presence in modern life;
- . the importance of cultural activities in creating a milieu favoring social and economic growth.

The Applebaum-Hebert Report identified the following functions of government in relation to the cultural industries:

- . government as proprietor
- . government as custodian

government as patron
government as catalyst
government as regulator

We shall use these categories in presenting policy proposals in this Chapter.

6.2 Government as Proprietor

In the case of the Government of Canada, it has accepted a proprietary role in a number of major cultural enterprises, including some operated through Crown Corporations. These include such diverse activities as the National Gallery of Canada, the Canadian Broadcasting Corporation, the Canadian National Museum, the National Film Board, and so on. The Government of P.E.I. does not have the same requirement to undertake major enterprises of this nature, and has chosen for the most part to support cultural programs through private organizations.

1. We propose that Government affirm its present and long-standing policy of not establishing itself as proprietor with respect to any of the cultural industries, and that it forego any in-house enterprises in any of the arts, including the applied arts.

6.3 Government as Custodian

Any society will wish to preserve treasured cultural assets from times past, as well as important contemporary creations of lasting value. While these can be preserved in many ways within a society, the growing size of this heritage and the perception of it as a collective good, to be available to all of the people, requires some measure of centralization to efforts and the dedication of considerable resources to the work of preservation.

2. We propose that government continue its policy of establishing the heritage custodial function in the hands of public organizations and that a new museums policy be prepared to that end, in consultation with heritage interests. Such a policy should then be supported by a significant increase in operating funds to designated core heritage facilities in each region of the province so as to permit year-round operation. Increased subsidies should be offered to designated community museums which conform to museums policy requirements.

6.4 Government as Patron

The role of Patron involves the provision of financial resources for selected cultural activities, without consideration of rights of ownership or responsibility of management. This role has been exercised through a number of agencies of the Federal Government, and to a much lesser extent by the P.E.I. Government.

3. We propose that the Government of P.E.I. now adopt the following modes of intervention in its role as patron in this field:
 - 1) That government increase the amount of funds available in the Cultural Products Development Fund, and increase the maximum grants available to any one project by threefold the present amount.
 - 2) That Government provide an Administrative Grant to the P.E.I. Council of the Arts to permit it to reorganize itself as a federation of sectoral and regional organizations, whose task it shall be to promote the cultural industries on P.E.I. in accordance with the general findings of this and the Supplementary Report.

- 3) That government recover from the Council of the Arts the Arts Assistance Grants Program, increase the program by at least a three-fold amount, and assign it for distribution to an Advisory Body or Commission representative of the eligible disciplines.
- 4) That government provide increased funding for the operations of Theatre P.E.I., with the provision that the latter establish formal links with the three regional theatre groups operating in the province and that Theatre P.E.I. be assigned responsibility for core funding to those groups.
- 5) That government make available to volunteer organizers of community festivals on P.E.I. the professional services of its tourism marketing specialists, that festivals be encouraged in strengthening their programs, and that greater recognition be given to festivals in the province's tourism promotions.
- 6) That government reinstate its Art Acquisition Program, challenging the private business sector to match it in such an undertaking, and highlighting each of its major acquisitions as a event of public interest.
- 7) That Government undertake a special marketing assistance program directed to the cultural industries, to be designed in consultation with the appropriate sectoral organizations within the Council of the Arts, with special attention to the tourism and export market segments.

6.5 Government as Catalyst

The role of government as catalyst differs from its role as patron, in that it does not involve the direct disbursement of public funds to industrial sectors but relies on indirect methods to produce effects.

4. We propose that government:

- 1) That Government review all of its business assistance programs to ensure that similar support is as available to sound but risky business ventures in the cultural industries as they are to such businesses in other sectors; that is to say, that no distinction be made in program eligibility between one type of business or another, where goods or services are being prepared for sale.
- 2) That Government undertake to design, through its Department of Industry or through Holland College, a special business training package geared to operators of small business in the cultural industries, to be offered in conjunction with the discipline organizations proposed within the P.E.I. Council of the Arts.
- 3) That Government undertake to develop a refined cultural industries typology and inventory, based on the work initiated in the course of this study, and that a system be established within each of the industries for the collection of on-going data to serve as the basis for further Government initiatives.
- 4) That Government respond to the urging of arts and cultural interests by designating a Department of

Cultural Affairs, thus ensuring the cultural industries the same standing and consideration within Government as is afforded other major industries in the Province, with the same direct access to the Ministry.

- 5) That the two levels of government cooperate in establishing a central referral service, assisting operators in these industries to identify and access possible grants and contributions from any source.

6.6 Government as Regulator

As regulator, the State can intervene directly to affect the course of development in any field of social endeavour by defining rights and obligations governing social transactions, and by enacting laws and compelling their observance. The regulatory role with respect to the cultural industries is primarily exercised by Parliament, but each province retains powers within its field of jurisdiction, particularly in education.

5. We propose that:

- 1) That Government implement the proposals contained in the brief submitted by the Council of the Arts in November, 1987, in the matter of Visual Art Education in the schools.
- 2) That Government commission an internal review of the role and status of all arts education within its school program, so as to ensure that due consideration is given to the development of artistic creativity wherever it emerges among students, and that students be encouraged in artistic endeavors.

- 3) That Government consider extending its school-subsidized activities to include a broader range of cultural activities, comparable to the effort currently being expended on school athletic programs, including the use of off-campus schools of theatre, dance, visual arts, and music to supplement school resources.
- 4) That Government commission a professional external evaluation of the Holland College visual arts and commercial design programs, looking to the causes and remedies for their present state and possible program improvements to conform to market requirements.

6.7 Federal-Provincial Initiatives

The foregoing proposals are advanced despite our knowledge that the Government of Prince Edward Island does not now have funds available for those purposes. The proposals presume agreement between the Federal and Provincial Governments on a Cultural Development Agreement which would enable new public investments of the magnitude suggested above, all of which would appear to have the endorsement of the various industrial sectors.

We are aware of concurrent demands being advanced to both Governments in directly related fields: namely, the implementation of the proposals for the commemoration of the Birthplace of Canada, and proposals for establishing the Confederation Centre of the Arts on a sound financial footing.

We would presume to comment on both demands as follows: the commemoration of the Birthplace of Canada theme can only be carried out in appropriate fashion, fitting to the dignity of the nation and the event and times being commemorated, if there is a strong and vibrant cultural environment in the province. The proposals for the Birthplace Commemoration anticipated strength

in the cultural sectors which this present study finds to have been somewhat over-estimated. The Birthplace of Confederation theme is intended to be a perpetual one for this province, and will require the ongoing presence and activities of professionals in arts and culture. The implementation of this report will help ensure that supply.

In the case of the Confederation Centre of the Arts, the role of that facility as a national memorial to the Fathers of Confederation must be kept to the fore. It was primarily built as a National Memorial and requires to be maintained in the dignity appropriate to the statesmen and events which it memorializes. To have the Centre competing for funds with Island regional theatre and Island visual artists would not honour the nation or those in whose memory the Centre was established twenty-five years ago.

Thus these three causes are not competitive for available cultural funding. We perceive the development of the cultural industries as a precondition to the Commemoration of the Birthplace, which itself has combined cultural and economic objectives. Although the Fathers of Confederation Centre of the Arts could in due course serve as the vehicle for the Birthplace commemoration program, its funding should be beyond purely local considerations. It would be unfitting for the nation to consider otherwise.

APPENDIX 1

STEERING COMMITTEE MEMBERS

APPENDIX 1

STEERING COMMITTEE MEMBERS

Co-Chairs

Carmen Comeau-Anderson - Communications Canada, Atlantic
Regional Office

Alan Rankin - P.E.I. Department of Community and Cultural
Affairs

Angela Bourgeois - Communication Canada

Bunty Albert - Atlantic Canada Opportunities Agency

Jim Erly - Department of Regional Industrial Expansion

Bill Bartlett - P.E.I. Department of Education

Bill Buell - P.E.I. Department of Industry

Doug Smith - P.E.I. Department of Tourism

APPENDIX 2

QUANTITATIVE SURVEY QUESTIONNAIRE

STUDY OF THE ECONOMIC IMPACT AND DEVELOPMENT POTENTIAL OF THE CULTURAL INDUSTRIES ON P.E.I. WITH REFERENCE TO FISCAL YEAR 1986

Survey Questionnaire - General

1. Interview number -----

2. In what county(ies) was your operation located in 1986?-----

2.

- Prince P.---
- Queens Q.---
- Kings K.---

3. In which of the following sectors did you operate? (Please check) 3.

- a) Museums (commercial, provincial, community) a)---
- b) Historic Parks b)---
- c) Arts Education (fine, applied and performing) c)---
- d) Literary Arts (authors and publishers of books, periodicals and magazines) d)---
- e) Performing Arts e)---
- f) Visual Arts f)---
- g) Crafts g)---
- h) Film and Video h)---
- i) Sound Recording i)---

4. (For 3-c - 3-i only) What types of products/services did you produce on P.E.I. last year?-----

5. In what year did you begin selling your products/services? 5. 19__
6. Were you incorporated as a business in 1986? 6. Y___
N___
7. Did you operate as 7.
- a) Sole proprietor. a)___
b) Partnership -(How many persons involved?) b)___ (___)
c) Cooperative c)___
d) Corporation d)___
e) Other?----- e)___
8. Was your operation located: 8.
- (may answer more than one)
- a) in your own home a)___
b) own workshop on residential property b)___
c) shared workshop away from home c)___
d) commercial property d)___
e) industrial park e)___
f) institutions f)___
g) other?----- g)___
9. Were your premises: 9.
- a) rented a)___
b) owned b)___
c) other?----- c)___

10. To what extent were you involved in your operation in 1986? How much in 1984? How much time do you anticipate spending in your operation in 1988?

10.

86 84 88

a) full time	E/T a)	---	---	---
b) part time	P/T b)	---	---	---
c) seasonal: full-time	SF/T c)	---	---	---
d) seasonal: part-time	SP/T d)	---	---	---

11. On what basis did you derive income from this operation in 1986?

11.

a) hourly	a)---
b) salary	b)---
c) "what's left after expenses"	c)---
d) other -----	d)---

12. What percentage of your income in 1986 was derived directly or indirectly from your work in the cultural industries? Would you mind telling us approximately how much income this represented?

12.

---%
\$---

13. Did your operation receive assistance or funding from any of the following sources in 1986?

13.

	Continuing Funding	Other Assist.	No Funding Assist.
a) Government of Canada	a) \$---	-----	-----
b) Government of P.E.I.	b) \$---	-----	-----
c) Foundation/corporation	c) \$---	-----	-----
d) Local community	d) \$---	-----	-----
e) Private/volunteer	e) \$---	-----	-----
f) Other -----	f) \$---	-----	-----

Comment:

14. In addition to yourself, how many persons were employed in your business in 1986? In 1984? How many do you anticipate for 1988?
14. a) 86___
b) 84___
c) 88___
d) NA___
15. Can you assist us in expressing the above employment in person years? (Persons x months/12)
15. a) 86___
b) 84___
c) 88___
d) NA___
16. On what basis were your employees paid?
- a) hourly
b) weekly (salary)
c) piecework
d) other_____
16. a)___
b)___
c)___
d)___
e) NA___
17. What were your total labour costs in 1986, including your own salary?
17. a) \$ ___
b) NA___
18. What were your total sales for 1986? For 1984? What do you anticipate your sales will be in 1988?
18. a) 86___
b) 84___
c) 88___

19. What percentage of your sales/services did you sell/provide directly to consumers, as opposed to selling through retailers or brokers? 19.
a) _____%
20. What is your estimate of the percentage of direct sales made to visitors to P.E.I.? 20.
a) _____%
b) NA_ _ _
21. What percentage of your sales did you 21.
a) sell to distributors/publishers a) _____%
b) sell to retail outlets/galleries? b) _____%
c) NA_ _ _ c) NA_ _ _
22. Approximately what percentage of your sales were made off-Island in 1986? 22.
a) _____%
b) _____
23. Of the sales made off the Island, approximately what percentage was made to 23.
a) other Maritimes a) _____%
b) other Canadians b) _____%
c) Americans c) _____%
d) other? ----- d) _____%
e) not applicable e) _____NA

24. Who provides your bookkeeping services?

24.

- a) business owner
- b) other staff
- c) family
- d) professional
- e) other -----

- a) ___
- b) ___
- c) ___
- d) ___
- e) ___
- f) ___ NA

25. What were your major raw materials (i.e. goods and services other than labour) purchased in 1986, and how much does your business spend on them? What percentage of total expenditures for each class of materials was purchased off Island

25. NA___

	Amount	% Purchased Off Island
-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----
-----	-----	-----

26. Do you think your business will expand 1988? If so, what do you believe to be the factors behind changes in your business between 1984 and 1988?

26.

- Y ___
- N ___

APPENDIX 3

QUALITATIVE INTERVIEW GUIDE

DISCUSSION GUIDE FOR GROUP MEETINGS WITH CULTURAL SECTOR
REPRESENTATIVES

A. General

1. One of the products of this study will be an inventory of those now involved in the cultural industries in a professional or serious way. In our methodology we have stated that to be involved in an "industry" one must be producing a product or service for sale. Yet we are told that in some sectors the sale is secondary to the art, that while a commercial activity is a necessary means of supporting ones art the artist creates as a means of expression, without primary concern for making a sale. We do not wish to be the arbiters of who is or who is not seriously committed to an art form, but at the same time do not want to submit with our report a roster of artists which is seriously flawed.
 - a) With that as a background, and within the conventions of your sector of the cultural industries, how would you distinguish between a professional artist, a serious artist, a dedicated hobbyist, and an occasional, even though talented, dabbler? Is there a ready definition upon which most of your colleagues would agree?
 - b) We have prepared the attached list as representative of those whom we consider to be either a professional or a serious artist in your sector. Again, considering the conventions of the sector, and recognizing that selections may be arbitrary at best, would you review the list for challenges or omissions.
2. I would like to begin the discussion with one round of identifying the major issues in your sector which need to be resolved: what is the single issue which troubles you (and/or your colleagues) the most: a) within the industry itself? b) outside the industry?

I would like to focus the remaining discussion on five main topics:

- . developmental opportunities in your sector
- . training and skill development requirements
- . marketing and promotion
- . public/private sector support or assistance
- . tourism linkages

The questions which follow are merely intended to suggest a way of exploring each of those topics. In the case of some sectors, the topics may not apply. We will explore in depth the topics which are considered to be of most concern to the group. on.

B. Development Opportunities

1. What is the potential for expanding your sector, considering both products and markets?

Products

Markets

- a) In the short term?
 - b) In the medium term?
 - c) In the long term?
2. Are there particular factors which limit expansion of your sector? (Probe: limited resources of individual operators, absence of distribution system, over-supply, low income to operators, lack of support for association, etc.)
 3. What actions are required within your industry to ensure that its potential is realized? (Probe: improved product, improved industry-wide marketing, increased promotion, increased production, industrial leadership, etc.)
 4.
 - a) Are there arrangements within your sector for information sharing or coordination among operators for product development, marketing, or other efforts in support of the sector?
 - b) Is there a province-wide association for your sector?
 - c) If not, are there advantage/disadvantages of such an association in terms of development of your

industry? Should such an association be established?

C. Training and Skill Development

1. Are training and skill development programs necessary for the continuing development of your field?
 - a) for new entrants Yes___ No ___
 - b) for persons established Yes___ No ___
2.
 - a) Are the present training and skill development programs adequate?
 - b) Are changes needed to the present programs? Please explain.
 - c) Are new programs needed? Please explain. (Probe: Business training, technical, marketing.)
3.
 - a) Are new technologies applicable to your sector? If so, in what way?
 - b) If yes, have operators in your sector taken advantage of new technical developments and applications? If so, in what way?

D. Marketing

1.
 - a) Has your sector adopted specific marketing and promotional activities?
 - b) Which of these have proven most/least successful?
2. What are the principal strengths within the sector which have helped sell your products? (Probe: product strength, market environment, retailing methods, tourism promotion in province, pricing, etc.)
3.
 - a) What factors now limit the marketing/distribution of your products? (Probe: personnel resources, seasonality, absence of distribution system, prices, excessive supply, competitor practices, etc.)
 - b) What can be done by individual operators to alleviate those factors?
 - c) By the industry generally?
 - d) Is there a role for government?

E. Role of Government/Private Sector

1. What suggestions would you make for initiatives within either the private sector or government in order to realize the opportunities identified for your sector?

- a) private sector
 - b) federal government
 - c) provincial government
- 2.
- a) Is there assistance specific to your sector from the provincial or federal government? (Please describe specific assistance available.)
 - b) Are there general programs for which operators in your sector are eligible?
 - c) How effective/beneficial is each of these types of assistance?
 - d) What improvements or modifications would you suggest to make them more helpful/effective? How would such changes help your industry?

F. Tourism Linkage

1. What percentage of sales in your sector would you attribute to tourists on P.E.I.?
2. Do you consider that your sector is in any way a factor in encouraging tourism in your area of the province? That is, are tourists previously aware of your operation and make the trip to your area to visit you, or do they come to your area for other reasons and find you when they are there?
3. Do you have solid information in support of that opinion?

APPENDIX 4

LIST OF PERSONS INTERVIEWED DURING QUALITATIVE SURVEY

LIST OF PERSONS INTERVIEWED DURING QUALITATIVE SURVEY

COUNCIL OF THE ARTS

- . Laura Brandon
- . Laurie Brinklow
- . Dianne Campbell
- . Lynn Davidoff
- . John Downing
- . Tom Hall
- . Judy MacDonald
- . Derek Martin
- . Daphne Scott
- . Pat Smith
- . Ferne Taylor

VISUAL ARTS

- . Pat Allen
- . Brian Collins
- . Terry Dunton
- . Stephen MacInnis
- . Nigel Rowe
- . Kirby Smith
- . Lionel Stephenson
- . Brenda Whiteway

LITERARY ARTS

- . Laurie Brinklow
- . Debbie Gamble
- . Larry LeClair
- . Richard Lemm
- . Libby Oughton
- . Ann Thurlow
- . Julie Watson

PERFORMING ARTS - MUSIC

- . Dennis Boudreau
- . Jan Clement
- . Shawn Ferris
- . Ralph Gay
- . Eric MacEwan
- . Heath MacIntyre

PERFORMING ARTS - THEATRE AND DANCE

- . Niall Burnett
- . Katie Mason
- . Pat Smith
- . Brian Stevens
- . Rich Wilson

CRAFTS

- . Irene Arsenault
- . Joan Auld
- . Joyce Burke
- . Diane Gaudreau
- . Peter Jansons
- . Catherine Noseworthy
- . Henry Purdy

FILM AND VIDEO

- . Jack MacAndrew
- . Brian Ramsay
- . Dave Ward

SOUND PRODUCTIONS

- . George Brothers
- . Dave MacKay
- . Brian Ramsay

HERITAGE INSTITUTIONS

- . Rick Adams
- . Wilfred Arsenault
- . Joanne Beiler
- . George Campbell
- . Nonie Fraser
- . Wayne Wright

APPENDIX 5

THE NATURE OF ECONOMIC GROWTH:
A THEORETICAL FRAMEWORK

APPENDIX 5

THE NATURE OF ECONOMIC GROWTH: A THEORETICAL FRAMEWORK¹

1. General

Economic growth occurs within a region when new activities are added to its system of production and consumption. Although the production and consumption of goods and services exist in a form of balance, a healthy economy exists only in a state of change: change in demand, product changes, changes in the economic environment, new actors entering the system, and so on.

The entry of new producers will not disrupt the balance within an economic system, because producers are also consumers. The more they produce, the more they will consume. Because new activities can be absorbed in this way, there would appear to be virtually no limits to economic growth within a regional economy where labour supply is not a constraint.

To understand the nature of economic growth it is useful to consider economic activities under two general categories: basic activities and non-basic activities.

Basic activities are those which produce goods and services for customers outside the region an external market. This is referred to here as the "economic base".

Non-basic activities are those which deal entirely within the local market. They include:

 firms servicing only the region and depending on local trade

¹This framework is a condensation of a more detailed presentation prepared for a DPA Report on Acadian Economic Development for La Societe Saint-Thomas d'Aquin, and is based on a theoretical analysis originally prepared by our colleague, Marcel Cote of SECOR Inc., Montreal.

- . local government services
- . provincial and federal government services delivered in the region

The "economic base" is the force behind economic growth; for the most part it sets the level of total economic activity in a region. The reason for this is that whereas sales in the non-basic sector can grow only as the population grows, or as its disposable income increases, sales in the basic sector can grow as much as the export market will absorb. It is exports which bring new money into the regional economy, which then provides capital for the production or importation of goods and services consumed in the region. These in turn provide opportunities for growth in the non-basic sector, and thus the economy grows.

For this reason developmental initiatives should be directed to the economic base if real growth in the regional (provincial) economy is to be achieved. Conventionally the economic base on P.E.I. has been considered as encompassing the primary industries and manufacturing or processing activities. Cultural activities have not been perceived as basic activities, but rather as a local service industry.

To appreciate the full economic potential of the cultural industries it is necessary to see them in three perspectives:

- . as export activities
- . as tourism-export activities
- . as import replacement activities

Tourism represents a de facto export market whose economic value is enhanced for two reasons: 1) it eliminates shipping and distribution costs; 2) through on-site purchasing by tourists goods are appreciated in their production context. This

encourages a free promotional and marketing service in the tourist's home venue.

Also tourists enable non-basic activities to become part of the economic base on a seasonal basis; restaurants, theatres, gift shops, museums, and the like which ordinarily depend on local trade are able to sell to an export market during the tourism season, thus increasing their worth to the regional economy.

2. The Entrepreneur

New economic activities and economic growth originate with entrepreneurs. This is true of the cultural sector as in the case of other sectors.

Operators within the cultural industries have tended not to think in terms of an export market and have been even hesitated to recognize their role as entrepreneurs. Yet anyone who sells goods or services directly to the public is to some extent an entrepreneur: craftspersons, orchestra leaders, artists, film producers, music teachers, dance school operators, etc. are all entrepreneurs when they make a living from the sale of their products.

An economy will grow if the right conditions are present. The most fundamental of those conditions is the presence of entrepreneurs who are willing and able to initiate new economic activities. This means that within a region the social and technical barriers to becoming an entrepreneur need to be low, and the incentives need to be relatively high. Even more than financial assistance, entrepreneurs often require moral support from within their communities in order to take the first steps towards establishing themselves in business.

As new activities emerge and catch on they get linked to the system of exchange within the regional economy. New supply and trading relationships are established, new distributors and buyers are put in place, and new organizations emerge to handle all of this activity. For the cultural industries to achieve their full growth potential, there must be key people within each sector willing to become a part of this powerful dynamic, and the infrastructure must be there to support them.

3. Mechanisms for Economic Growth

It is important to consider opportunities for the cultural industries in light of the basic mechanisms for economic growth.

This section identifies eight growth mechanisms, as follows:

1) Exploitation of Natural Resources

The chief variables here are supply, market prices, the state of local technology, and the availability of resources to support resource development.

There is a strongly held view among cultural interests on P.E.I. that cultural resources have been underdeveloped in this province. Sectoral spokespersons have referred to the limited educational effort directed towards human resource development in their arts and culture and to strengthening the province's technological development in each of the cultural industries.

2) New Integrated Industries

This mechanism describes a process of growth whereby new businesses develop in relationship to those which are already established in the region, whether through breakaways, job-

hopping, idea swapping, or other means. It requires three conditions:

- . the presence of firms in sectors where technological progress is rapid;
- . the presence of technical experts in these firms;
- . the presence of both dynamic entrepreneurs and potential local investors.

Capitalizing on the drawing power of the Confederation Centre of the Arts to spin off related cultural enterprises would be one application of this growth mechanism.

3) Importation of Branch Plants

Importation of branch plants is a highly-touted economic development activity, but it is one which may have little impact on real economic growth. Enticement of a major film production company to the province with incentive funds would be an example of such an activity, which might well have little real impact on in-province cultural industries. Of more significance would be made-in-province requirements when contracts are awarded to outside firms.

4) Creation of Basic Firms

This is a most important mechanism, which chiefly involves the creation of an economic environment which is supportive of the emergence of local entrepreneurs.

New firms typically come into being in one of two ways: entrepreneurs either draw ideas from their own work experience, or they pattern themselves on the success of others. The most effective entrepreneurs are those who build on their own work

experience, dealing in areas which they are already familiar with.

Development efforts should be towards creating conditions which encourage new business starts, especially through increasing the rewards and reducing the risks of becoming an entrepreneur. To the extent that the cultural industries on P.E.I. are not now disposed to think in terms of entrepreneurial initiative, there is a challenge to create art and business, as some have already done in each sector.

5) Expansion of Existing Firms in the Economic Base

This is the most effective approach to regional development in the short term. It involves economic development interests in the identification of businesses with high or good growth potential, and then assisting those businesses to expand into the export market. A number of operators in several cultural sectors are already exporting and these should be encouraged in expansion efforts; others may then be encouraged to follow their example.

6) Transfer of Firms from the Non-Basic to the Basic Sector

There are dynamic entrepreneurs in the non-basic sector, but growth in that sector is limited by the size of the local market. In order to grow after the local market is saturated, an entrepreneur must convert to an export trade, selling goods or services outside the region. This is another fruitful area for growth and those operators who are now positioned for export should be assisted in the transition.

7) Expansion of the Non-Basic Sector

Ordinarily the non-basic sector looks after itself. The fact that it is not a significant contributor to economic growth does not lessen its importance, however. If a region is underdeveloped in the non-basic sector it provides opportunities for other regions to export goods and services into it, such as theatre, music, dance, etc. The province should ensure that it can satisfy its own local market in these respects to the maximum extent possible, ensuring that local needs are satisfied by local producers.

8) Import Substitution

Import substitution is an important long-term growth mechanism, and is related to the mechanism described immediately above. It happens when the area begins producing locally those goods and services which formerly had to be purchased outside the region. This may include such things as consumer goods (e.g. arts and craft products), professional services (e.g. art education, theatre schools, sound studios), or manufacturing (e.g. video, film, or album production, book publication, etc.).

4. Conclusion

Essentially, full realization of opportunities for growth in the cultural industries, as in any other industry hinges on three factors:

- emergence of entrepreneurs as lead agents in the development of each of the sectors, and the recognition by all operators of the need for the application of business principles and business methods;

continuing expansion of the province's tourism market, and maximum exploitation of that market by cultural businesses;

development and expansion of an export market.

There is a growing recognition among producers and artists that they are engaged in business, often without having developed the requisite business skills and methods. This has been identified by such diverse interests as musical groups, artists, craftspersons, art educators, museum directors, and theatre managers. They are aware of the need for improved business skills, but do not have the means to acquire them. It will be important to the realization of development opportunities that they do so.

REPORT ON
ECONOMIC IMPACTS AND OPPORTUNITIES
THE CULTURAL INDUSTRIES
IN PRINCE EDWARD ISLAND

VOLUME 2
SECTOR DESCRIPTIONS AND INVENTORIES

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APPENDIX - Sectoral Inventories

1.0 INTRODUCTION

During the research into the economic impact of the cultural industries on Prince Edward Island a number of group interviews were held with persons selected as representative of the various cultural sectors. These interviews were held to provide a context for the interpretation of quantitative data from the project research, and to identify possible new opportunities for the cultural industries as well as significant barriers to the realization of those opportunities.

Participants were selected on the basis of their standing in their respective sectors, their position in sectoral organizations, their experience, or their reputation among their peers. An effort was made to secure some measure of geographical representation. In two cases interviews were held with individual persons where group meetings could not be arranged (Sound Recording, Film and Video).

The interviews proved to be of sufficient interest that it was decided to record and submit the findings as a companion document to the principal report. To ensure accuracy in presentation, draft reports were submitted to participants and editorial changes were subsequently made on the basis of comments received.

The information in the following reports represent a summary of discussions held over eight group meetings of from two to three hours each, and a number of individual interviews. The Project Manager takes full responsibility for the selection and presentation of subject matter for this report. The issues identified and the suggested proposals are entirely the outcome of the group interview process. Proposals are included here without any effort to consolidate, prioritize, cost, or identify possible implementation agencies. Where relevant, selected proposals will appear in the main Project Report.

The report which follow represents a contribution beyond the original terms of reference of the economic impact study project. In preparing this document it is our hope that its findings will be useful to persons who are committed to achieving progress within the various sectors of the cultural industries.

J.E.Green, Project Manager
The DPA Project Team

2.0 Arts Education - the 4th R

2.1 Sector Defined

Consideration of arts education would ordinarily not be included in the scope of an economic impact study. It is being included here because of the importance attached to it by all of the sectoral groups interviewed in the course of the study. The information which follows is additional to observations on this subject in the reports specific to each sectoral group meeting, and consistent with proposals advanced to government in November, 1987, by the P.E.I. Council of the Arts.

Art education is used here with reference to the visual arts only. Where reference is made to arts education, all disciplines are included. Specific reference to education in relation to the different disciplines is included in later chapters of this report.

2.2 Issues

1) Non-Responsiveness of the Educational System

One continuing theme in project interviews was an overriding concern for the non-responsiveness of the educational system to what arts world representatives have been saying for a decade about the need for educational changes within their fields of interest. They consider those now responsible for planning education demonstrate a strong bias towards linear-sequential and logical-analytical learning processes which are no longer appropriate or useful in the case of large numbers of children, particularly in view of the impact of the electronic media on the learning experiences of children in their pre-school years.

While individual teachers may recognize that music and art are valuable in their own right, as are other cultural activities, this awareness does not result in a perception that cultural studies offer real opportunities and real jobs. It follows that public education is then oriented towards more practical concerns, such as career opportunities through science and technology. These are immediately recognized by educators as serious fields of study, having value in real terms.

The result is that training in the cultural sectors on P.E.I. must be obtained for the most part outside the school system, where it is available only to those who can afford it, regardless of who may need it, or want it, or profit from its methods. Private art program teachers must then keep costs low in order to attract students in sufficient numbers to maintain their schools. This results in inadequate financial resources for growth and expansion, or to engage skilled professionals to provide advanced training for skilled students.

This situation in arts education results in a perception of cultural activities as elitist, which obstructs public funding and places further emphases on ability to pay. In this way arts education is forced into a situation where it becomes progressively more elitist. The elitist image of culture is further encouraged by admission fees to cultural activities: for example, the Summer Festival, although heavily subsidized, still has admission fees which discourage people of modest means from attending. That arts education has retained any kind of populist flavour is due primarily to the financial sacrifices of those who are attempting to provide dance, theatre and art training with consideration of the ability of families to pay.

Children and youth it was said, tend to be heavily influenced in their early learning processes through visual media presentations, which amuse and entertain while they instruct. Teachers relying on traditional methods of presentation and learning of materials must now compete with several legacies of television viewing:

- . orientation towards visual over aural perception
- . rapid transition between images and high stimulus demand
- . abbreviated treatment of topics and short attention spans
- . thought processes which are strongly influenced by sensory experiences and perceptions.

Arts representatives question why educational officials have been so slow to grasp what appears evident to all but those responsible for formal education. This was a common thread in all group interviews with sectoral representatives, along with the parallel question of how to get educators to understand and make the changes necessary so that the educational system will be relevant to the needs of students. They do not expect that teachers be entertainers, but that the school system will place greater emphasis on sense experience, on development of the imagination and creativity, and on understanding the relationship between thought and effect.

One professional communicator pointed out that huge fortunes and industries have been created through modern advertising because professionals in that field have long recognized the power of visual imagery over spoken and written messages,

and the importance of addressing messages to the senses rather than primarily to the intelligence. Educators do not seem to have reached a similar level of awareness with respect to the power of visual imagery and sense experience, and thus have not adapted this knowledge to education. This is not to suggest that advertising techniques be used in education, but rather that educators should be equally as alert to the use of new technologies in this field as other professionals have been in theirs.

2) Art Education as Process

Where art education is included in the educational program its subject matter content may be stressed over the learning process which it represents. Art education is as much education through art, as education about art - equally concerned with method as with content.

Art education is directed to the development of the creative imagination and the conceptual abilities of students. Learning by rote and memorization does not enable children to acquire an understanding of the importance of ideas which lie at the core of action. Art education encourages creative thought as an ingredient of action; the production of art works then places the thought in a sequence of events which produces a finished product.

Art education brings together concepts, materials and techniques, and emphasizes the value of creativity and imagination in practical ways which are immediately apparent to students. While art produces the direct rewards which students value, it also teaches them the process and effort required to achieve rewards, and the importance of discipline in achieving them.

It is recognized that the concept of art education as a method of learning will be difficult to achieve in the school system, because of long-standing pedagogical techniques reflecting the traditions of the public schools. The arts community is willing to support and assist such an effort once the important key supports have been put in place and a sincere commitment is made to it by school boards and officials.

3) Divisions of Arts Education

A clear distinction was made between Fine Art and other aspects of Arts education. There is a fear on the part of the Council of the Arts that art education will become diluted by subdivision of available time among all of the arts subjects.

An Art Education program, according to its proponents, should focus entirely on the visual arts: painting, drawing, sculpture, print-making and design, photography, and art history. There is more than sufficient content in those subjects for the time presently available. All interest groups interviewed recognized a problem for school administrators in dealing with all demands for arts education, in its various aspects; at the same time, they consider that art education merited special consideration because of the strength it brings to other aspects of the learning process. By reinforcing the natural psychology of learning, art education enables students to bring real life experiences to the classroom, and helps make all education more relevant and immediate to them.

4) Art Education as a Complete System

It is considered important that an integrated art education program be available, extending to students at all levels as well as to the teachers of those students.

Art education presupposes that training is available for the art educators. UPEI, the source of most Island teachers, now offers one half-credit option each Spring, designated as "Art in the Elementary School". From time to time it also offers a summer inter-session course in art, if there is demand from the Teachers' Federation for such a course. It is not usual for graduate teachers to have completed the University's course program in the Fine Arts.

Holland College has suffered from a truncation of its applied arts program in recent years. Critics consider that it does not provide training in design, and that its commercial design, photography, and visual arts programs should be combined within the one school. They believe that there is a major problem in program structure at Holland College and that there will be problems in recruiting students if the present situation continues.

It was pointed out that while some Island artists will accept students on a tutorial basis in both Summerside and Charlottetown, they must assume that basic technical aspects have been learned elsewhere. In the present situation tutorials represent a very limited resource and it is not possible to build extensively on it. Art education must continue to have its foundation in the school program.

An understanding of and interest in art education could be stimulated through appointment by School Boards of "Artist-in-Residence" for various periods throughout the school year

to complement the work of teachers, to provide role models for aspiring art students, and to provide technical assistance and guidance to the latter. This is done elsewhere in Canada, with artists being paid at substitute teacher rates, and this has been an acceptable arrangement to artists.

5) Opportunities in Art Education

Artists and gallery operators alike consider that P.E.I. has a wealth of fine artists, sufficient to establish a reputation for itself as a major arts centre in the East. The gifts are here but they have been developed largely on their own, without a strong climate of support.

With the combined facilities of the Confederation Centre of the Arts, the University of Prince Edward Island, Holland College, the Great George Street Gallery organization, and the P.E.I. Museum and Heritage Foundation, it should be possible to present P.E.I. to Canadians in a new light as a place with interesting opportunities in art education. Education itself represents an interesting dimension of tourism, which could be strengthened considerably through joint programming by those various agencies.

To achieve these and other opportunities in this field will require stronger organization in the arts than presently exist, extending to both mandate and resourcing. Clearly some form of consolidation or restructuring is required if the cultural industries are to realize their potential and to follow through on the issues which have been identified in this study.

2.3 Proposals

- 1) That the Department of Education implement a demonstration project to determine the benefits for school children on P.E.I. of an arts enriched curriculum using practicing artists, as proposed by the Council of the Arts in October, 1986.
- 2) That the Department of Education adopt for implementation the proposal for an Art Education program submitted to it in November, 1987 by the P.E.I. Council of the Arts.
- 3) That Holland College undertake a major external evaluation of its School of Visual Arts, extending to the relationship between SVA and the commercial design and photography programs.
- 4) That the Department of Education and School Boards adopt an Artist-in-Residence program for schools which wish to participate.
- 5) That consideration be given within the University of P.E.I. to an enriched art education component within its Bachelor of Education program.

3.0 Crafts Sector

3.1 Sector Defined

This sector includes persons who make goods for sale whether or not they have attained registration with the P.E.I. Crafts Council. The sector has been extremely difficult to measure because of the lack of any form of registration other than membership in the P.E.I. Crafts Council.

As is the situation in other sectors of the cultural industries, three levels of commitment were identified:

- . professionals who are engaged in craft production on a full-time or part-time basis, and make their livelihoods thereby;
- . serious amateurs who produce on a part-time basis and who are attempting to meet standards for recognition by the P.E.I. Crafts Council;
- . hobbyists who produce goods for sale from time to time for sale, and who are satisfied with their present level of skill and quality.

There is a considerable variation in the extent of "professional" commitment to craft production. Of the more than 800 estimated craft producers on P.E.I., fewer than 5% are attempting to derive their livelihood entirely from their craft. The majority produce on a part-time or seasonal basis, with crafts representing only one of several sources of household income.

There are various marketing arrangements in the sector. Most operators sell their products only within the province, with only a few being involved in export on any scale. Fewer than 10% of producers operate their own retail outlets. Retail outlets are distributed as follows:

	<u>Shops</u>
producer-retailer -	70
retailer -	14
cooperatives -	<u>19</u>
Total -	103

We estimate that there are in excess of 800 craftspersons producing in excess of \$800 worth of goods per year. Of this number about 140 are juried members of the Crafts Council, and these produce considerably in excess of that amount.

The Council has established a jury system for certifying the work of new applicants for membership, about 75% of whom are approved each year. It excludes from membership those whose products are commercially reproduced, or who use design patterns not calling for any measure of skill or originality in their application, or who are involved as hobbyists without having made a serious commitment to the production of qualify craft.

The Council perceives its members as being essentially owner-managers of small business enterprises. As with all small businesses, they begin with sharply limited capital, and learn all aspects of business management from the ground up, including financial management, production management and design, marketing, and other aspects of their business.

3.2 Issues

1) Education - General

The crafts interest group observed that subjects bearing on arts and culture are not well integrated within the school curriculum. The cultural industries on P.E.I. have developed in spite of and not as a result of schooling and formal education. The development of the creative intelligence required in the arts and crafts is not encouraged within the educational program. They believe that there is a need for a stronger artistic and cultural component in education.

Art education encourages creative thinking throughout the process of design, teaches relationships between parts in production, and emphasizes creativity as important in life achievement and success. On the other hand, art seems to be perceived by the majority of teachers as of secondary importance, and craft production as something which is done at the hobby level.

2) Education for Crafts

The major issue identified by craft spokespersons was with respect to technical and business education. Considerable dissatisfaction was expressed with the present format and course offerings through the Holland College School of Visual Arts (SVA). Representatives of the sector considered that the Holland College STEP system is not suitable for craft training, where more active hands-on teaching is required for students to learn techniques and develop skills. Skill development requires discipline, and in craft production at the novice or student level, discipline requires supervision.

Crafts persons believe SVA courses should be more deliberately structured, and that there are also major weaknesses in the resource materials available to students. They believe that the STEP system lacks a problem-solving orientation, and encourages a pass mentality rather than creativity. They do not believe STEP produces promising craftspersons, and cite this as one of the major weakness at the school.

They also state that there is insufficient course content in management, covering all aspects of owning and operating a craft shop. Not only are SVA graduates poorly equipped to go into production on their own, but they may not be acceptable to employers operating "production studios". Objection was expressed regarding work attitudes which develop from optional attendance policies unless such a policy is supported by a high level of enthusiasm among staff, which they consider may not now be the case.

Further, location of the SVA within Holland College may be a disadvantage. As a craft school, a full-time program is important but there is also a need for specialized short-term courses, presented by first class artisans from various disciplines, skilled in different media. The Island reputation for quality crafts has been sufficiently well-established that the SVA could possible function on a national level, attracting students from a national pool of applicants as in the case of the School of Culinary Art.

P.E.I. has a strong Crafts Council, has a strong cultural base in the Confederation Centre of the Arts, and with a restructured program and improved profile, SVA could possibly draw high quality students from other provinces. This is not now happening to any extent. Courses need to

change as new media emerge, and as technologies and markets change.

The Project Team is not in a position to assess the validity of these points of view. It should be noted however that they emanate from the sector which SVA serves and for that reason merit consideration even if not objectively valid in all particulars.

3) Tourism-Marketing

Sectoral representatives noted that the tourism master plan for P.E.I. does not highlight Island crafts. Increasingly people are making provision for cultural experiences in their vacation plans. Quality crafts are among the foremost among the cultural attractions and yet this sector has not been highlighted in tourism planning and marketing. Crafts now help market P.E.I. but this has not been officially recognized. This suggests that the whole crafts sector is not taken seriously within government, despite the level of quality and high customer recognition which it has achieved.

In addition, craft operators have observed that tourists seem to be better educated, with higher incomes, than perhaps ten years ago. They are less interested in scenic delights than in discovering the differences in the places they visit. They ask about weavers and potters, and traditional music. They want to get a sense of the life style and flavour of the Island but how to do this is not well identified for them.

4) Quality Promotion

As the crafts market grows and quality production increases, there is more opportunity for full-time professionals, with

a commitment to quality craft production. Emphasis in the sector should now be towards professional development, encouraging the serious amateurs to reach standards for certification by the Council.

At one time it was possible to sell almost anything that was handmade but buyers are becoming more discriminating. Thus public policies should favour full-time professional involvement in quality design and production.

The crafts industry has developed largely on the strength of the external market which comes to the province in order to make its purchases. It is estimated that almost 70% of the annual Island crafts sales are made in the tourist season. While the resident market has been supportive, it is not sufficiently strong to maintain a growing industry. The major opportunities in crafts are now in the export market, building on the reputation which has been carefully developed over the past fifteen years.

5) Industrial Policies

Handcrafts flourish through retail outlets operated by producers, but industrial assistance is not directed towards retail. Government agencies see craft shops in light of retail space, and do not distinguish between different sections, e.g.

- . production area
- . display/demonstration area
- . gallery for exhibition purposes
- . retail centre

Neither is there recognition that in this sector retail is largely the equivalent of export, in view of the large

tourism component of the market. Support for retail in this sector is not equivalent to support for any other form of retail.

Of the activities listed above, production may sometimes require the least space but may draw most consideration in funding. Building design, for example, must encourage viewing and flow-through, and must avoid discouraging drop-in trade by overcrowding in the retail section; this is important in relation to production and sales, but is not recognized in government assistance programs.

Crafts are not only an important component of tourism but also represent a non-polluting industry. As such the sector considers that it should be high on the list of government priorities for job creation programs. There is a need for at least equivalent treatment of craft producers and other manufacturers.

3.3 Proposals

1) School of Visual Arts Evaluation

The School of Visual Arts should invite the Crafts Council to establish a joint committee to examine and revise its program offerings, in the light of its present operating environment, with a view to preparing terms of reference for an external evaluation of the School.

2) Tourism Promotion

The P.E.I. Crafts Council should request the Marketing Branch of the P.E.I. Department of Tourism to include the Crafts Industry in the marketing of this province, as part of its presentation of the Island's cultural attractions.

Also, the Council should encourage acceptance by the Department of Tourism of the Council's production standards as the minimum criteria for advertising craft outlets in the Department's promotional brochures. Thus any retail outlet highlighting Island crafts in its promotional material would have to feature primarily the works of juried craftspersons, or else could not include crafts as part of its advertising package in tourism literature.

3) Program Policies

All Federal and Provincial Departments should be urged to recognize juried craft producers as industries for purposes of all industrial assistance programs, where production is on a full-time commercial basis.

4) Industrial Promotion

Developmental efforts within the Crafts Sector should be directed towards encouraging increased production of quality goods, and the professionalization of the Sector.

4.0 FILM AND VIDEO

4.1 Sector Defined

Film and Video is one of the smaller sectors of the cultural industries in terms of number of operations.

There were three firms active in the sector in 1987, one of which operates on an industrial scale out of a fully-equipped video production studio. A second company offers a film production facility and is primarily involved in experimental or culturally-related projects, supported by grants programs. The third is established as a commercial film-maker, working primarily under contract.

Two smaller companies offer video production on a small scale, as secondary to public relations activities.

The Film and Video sector includes three components:

- . production, which assembles financial, creative and technical resources to prepare products for market;
- . distribution, which wholesales film and video products to exhibitors, retail outlets, broadcasters, clubs, and libraries;
- . exhibition, which is the market and retail sector of the industry.

Distribution is the link between producers and exhibitors and is largely controlled in Canada by major American production studios in the United States to the disadvantage of the Canadian industry, including the theatrical industry

on P.E.I. For this reason television is the major market for Island film and video producers.

4.2 Issues

1) Industrial Vision

There are opposing viewpoints in this sector as to the "industrial vision" by which it should govern and direct itself. Those who have established commercial operations maintain that the concept of a "cultural industry" should be extended only to financially viable, self-supporting entities, producing products which are commercially acceptable to the public as indicated by sales and consumption. If there is not a market for their work, according to this view, film and video producers should not be supported by public funds solely on the basis that they are engaged in cultural activities. The sector should thus include only those people who are prepared to work at production as a means of making a living. Artistic interests, unless they are supported by a commercial market, should be pursued as a private activity, at private expense.

A contrary view is that communities have always relied on artists to identify and express cultural and spiritual values which characterize and underlie community life, and it is common for cultural activities to be subsidized to that end. Subsidies do not represent a one-way street, however, in that artists have always supported the industry, such as through accepting wages that are below market value in order to support product development.

Cultural products are seldom profitable or self-supporting: neither is experimentation with new art forms and expression. In addition, within Canada there would not be

any media or film production without some measure of public subsidy and it is even more essential for culturally valuable works to be supported by the public through government grants. Sectoral spokespersons state that some of the most notable artistic achievements in film have relied less on subsidy than have the mainstream industries.

The major film and video market in Canada at the present time is represented by television, and to some lesser extent the National Film Board. Production for this market is usually profitable, because of the assured market for the product. Producing outside that market presents difficulties in achieving profitability; producers must rely on a long-term pay-back market which does not support the industry which it uses. This makes it necessary for producers to seek out some kind of "deal" as a means of providing operating stability, rather than look to the market to achieve this.

Those who maintain this position say that it is difficult to think in terms of the financial viability of this sector without considerable subsidy, in one form or other. It is considered that those who think otherwise are not operating with real figures.

2) Recognition of Industrial Potential

Film and video productions are seldom directed to local audiences alone, except with respect to local advertising. Thus the production locale may have little bearing on the actual distribution and sale of the product. Except where major studio facilities are required, both film and video can be produced on P.E.I. as well as in other parts of Canada. The province now has the capacity to respond to

ventures in both media, and has produced well-accepted products in both.

In this respect the only limitation on what the Island may accomplish is in its failure of vision, and its reluctance to appreciate the industrial and export potential of the sector. It has been difficult for an appreciation of the industrial potential to develop within the province because film and video production is frequently associated in the public mind with major studio complexes in major centres. In addition, with few exceptions, those who wished to pursue careers in this field have gone elsewhere to do so. P.E.I. is not regarded as a production centre.

Whereas theatre productions bring together all of the arts in the creation of an artistic product, film and video add technology to the arts in the creation of new products for much larger markets. All of the skills required for this purpose are available in the province, which is capable of an expanded effort in both video and film.

While Island firms have limited film capacity as a result of the cost of film production and the lack of studio facilities, on-site technical support has been provided to outside producers who have shot film in the province. Possibly \$50,000 was spent on P.E.I. by four film units on location here in 1987. It is considered that there is further potential of location filming on P.E.I., which represents a form of export industry for P.E.I.

Thus there is a sense of capacity within the industry, but the recognition of its potential has been slow to develop on the part of important interests in the province.

3) Story-line Potential

The Island history and environment can produce a wealth of story-lines for film and video, as Anne of Green Gables has demonstrated. The producers of the Anne plays and films have capitalized on the universal values within those stories, as has the creator of CBC's "Them Times" series.

The proposed development of the Confederation theme, "1864 Belongs to Charlottetown" opens up an endless variety of stories to be told from an Island base: how people in the colonies lived in 1864, how they were educated, how their ideas on government were formed, how they played, how they worshipped, what the economy was like, how trade was organized, what people ate and how they dressed and organized their households, the role of women, the growth and importance of the press, and so on.

There are also many contemporary and timeless non-period stories which can be told on the Island, using gifted Island writers. For any of the 1864 stories to be correctly and faithfully developed skilled story-tellers, having a sense of history, will be required, working in collaboration with people from the performing and applied arts, combined with the technical arts in film and video production. Video and film can be used in combination with all of the performing arts to help make the past come alive, to complement the archives and libraries, using the technologies which characterize the present age. Realization of the potential in the 1864 commemoration will particularly rely on the skillful work of film and video producers, and consideration should now be given to preparing the industry for that task.

4) Public Policies

On P.E.I. the need to maintain a line of separation between business and politics has a special urgency because of the scale of operations on the Island and the sharp light of public scrutiny under which the public business is conducted..

This is best done by applying the test of business methods and considerations of value for money in all dealings between government and business, in this sector as in any other. At the same, time government should not be reluctant to deal with any Island business in the capacity of customer, where the technical skills are available to do the job. This industry cannot develop on the basis of grants and gifts, no more than any other industry, but can do so on the basis of business methods and performance.

Although government should not have a stronger role in this industry than any other, it is highly desirable that government have a correct orientation to the industry:

- a) Government agencies should recognize the technical capability of the Island industry and its potential for the export market.
- b) Government officials at all levels should make a greater effort to understand the dynamics of the industry, and how it must operate in a highly competitive market, and facilitate its growth where possible. The industry is operating on a struggling basis in all parts of the country which lack major studios and infrastructure support, and it is important that this context be understood within Government.

- c) Government programs and policies should apply equally to this sector, and their rules and conditions should not complicate or obstruct needlessly. There should be a readiness to say "yes", to help make things happen in the industry, which does not have the time and resources available for intensive lobbying to achieve policy reform.
- d) Government should take the lead in recognizing and promoting the technical and professional competence of all local industries, and should be reluctant to turn to outside agencies for services and products which can be provided locally. There should be a greater willingness on the part of government departments to take risks with Island businesses, at least equal to that which entrepreneurs must regularly demonstrate in maintaining the Island economy.

5) Education and Training

Concern for education and training was expressed at two levels:

- a) at the school level: industry spokespersons thought that there should be much greater exposure of students to all of the elements involved in producing what is such a significant part of their lives -- films, videos, and sound recordings. This exposure does not have to be in the form of standard course offerings, but could be in the form of workshops, special interest groups, and occasional exposure to media professionals, including producers and technicians and various classes of supporting professionals. In this way youth could be attracted to all of the possible careers in the industry, and opportunities would be provided for the

development of the initiators -- the artists, writers, and producers -- as well as technical and support staff.

b) at the technical level: sectoral spokespersons consider that despite its efforts Holland College has not been able to maintain an adequate program in this field. Its audio-visual program provides sound training in basic theory but has not been able to stay abreast of technology. Thus students are not well prepared for opportunities within an expanding video and film production industry.

Opportunities should also be available for apprenticeships in the industry, in the absence of adequate training programs, where industrial placements would be sponsored by government training bursaries or other assistance programs, including possible student loans. There should be a recognition of the difference between grants to the industry and training grants for student apprentices.

6) Media.Co-ops

Media co-ops have had a developmental role for film producers in all provinces. They provide a point of reference for beginners and independent film-makers, a means for assembling technical support staff, and opportunities for training and technical development. They also provide facilities and equipment, and a networking link among people at the same level of development in the industry across Canada.

Because the present trends in film production in Canada do not help low-budget producers, Co-ops do so to some degree, depending on the resources available in each provincial situation. They also offer workshops and seminars, sponsor

regional conferences, and maintain small scale production schedules.

Film and Video Co-op members in other provinces have independent production companies outside the Co-op, but use the co-op for various purposes, e.g., for its facilities, to contact technical staff, to access funds, to improve equity position, etc.

There is a media co-op on P.E.I. which attempt to providing a focal point for those interested in film production in the province. It provides a special contribution through sponsoring an annual regional meeting of independent film producers in the Atlantic Provinces, which brings together about 70-75 film producers to hear resource people address matters of particular interest to them. This also provides an opportunity for Island residents interested in film to learn from others having direct experience in the field.

4.3 Proposals

While there were no specific program proposals identified in the interviews with sectoral representatives, six areas of need were identified:

- 1) need to facilitate continuing development of the industry in light of real commercial opportunities;
- 2) need for assistance in marketing and promotion;
- 3) need for improved technical training and youth orientation to the industry;
- 4) need for developmental infrastructure, - quality facilities and equipment;

- 5) need for exposure to master technicians from time to time to help update Island industries in their crafts.

- 6) need for correct orientation of government programs and policies to the industry, and for appropriate assistance in its development. This would include raising the level of support available for new product development from the current \$4,000 maximum to about three times that level. The present subsidy is considered as sufficient only to complete a project, not to develop and initiate it.

5.0 LITERARY ARTS SECTOR

5.1 Sector Defined

There are a number of professional writers associations in Canada having a variety of membership requirements. These include:

- . Periodical Writers Association of Canada
- . Writers' Union of Canada
- . League of Canadian Poets
- . Playwrights Union of Canada
- . Alliance of Canadian Cinema, Television and Radio Artists
- . Various provincial writers associations

For this study we have elected a project-specific definition, and have included in the Literary Arts sector Island writers who have works in print or who regularly earn money from the sale of writing. This includes professional free-lance writers and writers who would otherwise be excluded from one or other of the professional groups listed above because of the category of writing in which they are most active,

Thus the literary arts may include anyone from free-lance reporters and writers of feature articles to poets and authors of fiction, drama, and childrens' stories. Those included may write for newspapers or magazines, or write brochures, briefs and reports, or write scripts for radio and television. In short, if they write professionally for money, and are not salaried media reporters, they are included in this sector for purposes of this study.

Using this definition 25 writers were identified as currently active on Prince Edward Island, with widely varying levels of income from their art. (It is important to note that peripheral activities associated with writing are sometimes more lucrative

than the writing itself; a P.E.I. poet, for example, would do well to realize \$500 per year from published works, but could earn ten times that amount annually from activities which derive from writing poetry, such as teaching, editing, jurying, reading, etc.)

In addition to its writers, P.E.I. has two general publishing houses, one which is primarily devoted to trade and ad publications, and two which are in the magazine or periodical production field.

5.2 Issues

1) Marketing Weaknesses

The bulk of the market for Island writers is off-Island - possibly 85% of revenue from published material is from off-Island sources, exclusive of the local media market. The on-Island market is primarily technical and commercial writing for manuals, brochures, briefs and reports, newspaper columns, magazine articles, public relations and advertising, and anything which will help produce income for writers. P.E.I. writers may earn an average annual income of \$4-5,000 from Island sources, as direct revenue from writing. There is an even smaller market for creative writing on P.E.I. than in the case of commercial market.

Because of the present numbers of writers and publishers and the lack of effective organization within the sector, there are problems in developing and expanding the local market.

E.g.

there is not now available an inventory or listing of writers capable of contracting for writing assignments:

placement of books in gift shops is dominated by an out-of-province distributor, which works to the disadvantage of Island writers and publishers. The latter do not have a resident agent promoting the display of their works;

the full potential of the tourism market is not being realized because of poor displays of Island publications in tourism outlets - ferries, information bureaus, etc.; this is allegedly perceived as a very secondary activity by tourism staff and there are no sectoral representatives or agents to monitor or promote displays.

There is no present organization within the literary arts which has resources to undertake an assertive marketing task.

At the same time, writers have indicated that there is potentially a very large market elsewhere in Canada for writers in view of the great variety of periodical publications and book publishers which require editorial material, as well as the continuing demand for writers for radio and television, and for film and video productions. Writers on P.E.I. are satisfied that the continuing strong demand for both fiction and non-fiction is increasing yearly; their concern is that P.E.I. has not developed a literary tradition and support system which can encourage and assist writers in reaching that market. Few professional writers now active on P.E.I. are products of the P.E.I. educational system.

Further, P.E.I. is the only province which does not have a program of support to regional (provincial) publishers for non-commercial although culturally valuable books.

Publishers are considered to be essential to the development and promotion of writers, and Island publishers are limited in the resources which can be devoted to new books by Island writers. It is quite difficult for first-time writers from P.E.I. to get published off-Island.

All provinces except P.E.I. provide grants for culturally valuable books; some also provide guaranteed loans at low interest rates for publication of regional books. On the other hand, the very small regional market on P.E.I. is least likely to enable books by Island authors to be financially viable. This situation means that books of local significance can not be published except entirely at risk to the publisher.

There is limited assistance available from any source on P.E.I. for publishers or writers:

P.E.I. Arts Council grants for all arts purposes have not changed substantially over an 8-year period, having totalled \$65,000 in 1987. The literary arts have received grants in the past 5 years totaling \$25,360, covering 27 applications.

Canada Council will provide assistance for "culturally valuable" books or for writing of artistic merit, using a formula based on the number of titles considered to be culturally related, and also on the quality of the work.

The Book Publishing Industry Development Program of the Department of Communications provides funding for specific projects which appear likely to achieve commercial success. Hitherto, DOC provided grants based on volume of sales of Canadian authors, which

provided some measure of assistance to small publishers. The new program now being introduced is considered threatening to P.E.I. publishers. The ability to access grants depends largely on the ability of a publishing house to devote resources to that purpose. With staff carrying out a great variety of essential tasks it is difficult to devote time to meeting grant conditions - e.g. statement of 5-year business plans and details of publication plans, etc. Small firms have not developed the full range of management skills that permit accurate long-range projections that represent anything other than hope, and faith.

The Cultural Products Development Fund of the P.E.I. Department of Community and Cultural Affairs assists in the development costs of financially viable products only and not culturally valuable books which may not have commercial merit.

There is no program on P.E.I. that will assist in the production of culturally important books such as those bearing on Island history, these may have a peak market of 500 copies and thus require subsidization if they are to be printed.

2) Promotion of Writing

Writing the same time, writing is an important underpinning to all cultural experiences, and also to technical, scientific and business development. Even the most casual of television or radio shows must be carefully scripted by writers. All film presentations require written scripts, sometimes rewritten from a full book. Thus, although film,

TV and videos may work to the disadvantage of reading, they have a voracious appetite for written material.

Despite the evident importance of writing, there is limited encouragement of this activity in P.E.I. except in four respects:

- . a one-credit second year course at U.P.E.I.
- . a one-year journalism program at Holland College
- . Ragweed Press
- . the Island Writers Association

According to professional writers contacted in this study, writing skills can only be developed through study and practice. There are few opportunities and fewer incentives for Island residents to develop those skills. Ragweed Press is the primary source of encouragement and advice for writers wishing to be connected to a possible outside market. Writers of non-fiction turn to the Island Writers Association or the Periodical Writers Association of Canada. Thus in effect only two people provide the major referral source for emerging new writers.

The Periodical Writers Association would be willing to sponsor writing festivals and competitions but does not have the resources to do so. Similarly, there are limited funds for sponsoring writers' workshops or retreats, or for encouraging any form of creative writing.

3) Public Perceptions

Writers have indicated that they were not encouraged in their craft during their school years, and there is little overt encouragement of professional writing in the Island generally. This results in a situation where, unlike its

rich representation in the visual arts, P.E.I. has a very low incidence of professionally accomplished writers. For example, Labrador has seven members of the Canadian Periodical Writers Association of Canada, whereas P.E.I. has only four.

This situation does not reinforce the emergence of qualified writers, whether professional or at the level of the serious amateur, despite the evident careers available in the literary arts.

4) Organization

Neither the P.E.I. Writers' Association nor the Periodical Writers Association of Canada regional representative have sufficient resources to promote this sector. The sector is too small to be able to support significant promotional efforts. In addition, the several definitions used by national organizations tend to exclude several genres of writing from one or other professional group.

Because of the relatively small size of the sector, and the limited revenue derived from writing for publication on the Island, writers state that they have limited energy, time, and resources to devote to organization and internal communications within the sector, or to politicize sectoral issues. They usually work long hours, may have second jobs, and must devote much energy to the creative effort involved in writing. This has impeded efforts by professional writers to act collectively in behalf of their own sector.

5) Writing and Cultural Heritage

Complementing oral tradition, architecture, archaeology, music, art, and artifacts, the literary arts are important

in transmitting information about our cultural heritage and history. The written record facilitates the interpretation of information from all other sources and improves our understanding of what has transpired throughout history.

As with other elements of culture, writing is of such central importance in our lives that its importance has been understated, much like the water in our wells. All peoples, in every age, should be alert to encourage and promote the emergence of writers in their midst.

6). Government Policies

At the present time there are occasions when jobs are listed within CEIC for writers, researchers, editors. Most of these job opportunities exclude people who are attempting to write professionally, because applicants have to be registered for UIC benefits. Free-lance writers are not eligible to contribute to UIC as self-employed persons. In addition, workers on one CEIC funded project in 1987 were required to work a 40-hour week at minimum wages, and any other monies earned from writing during that period were required to be deducted from the weekly project paycheck. For a writer to have accepted the assigned would have meant withdrawing from market contact for a 26-week period.

These situations were cited as representative of what may happen in the case of government policies which are of broad application and which do not take into account the internal conventions and dynamics of each industrial sector.

5.3 Proposals

1) Publishing

A regional publisher is of such importance to the literary arts that it is impossible to conceive of a lively sector without one. Publishers are a unique and special breed of people; there is a very high risk associated with every new author they publish, and indeed with any new work, until they reach second or third printing. In the case of small publishers their earnings may not be commensurate with their efforts, despite their best efforts to achieve economy and efficiency, within their capability.

For this reason, regional publishers should be recognized for their special contribution to the articulation of local culture, and provinces should undertake to assist them in ways which are consistent with sound business practice and recognize commercial realities.

It is proposed that government recognize the legitimacy of support for publishers of original works by Island writers, which would include not only book subsidies but also support for out-of-province tours by Island writers, and other innovative support, such as providing local books to schools, libraries, and using them as official government gifts.

2) Promotion of Writers

The low profile of the literary arts on P.E.I. can be upgraded in three ways:

- a) By the Department of Education and Regional School Boards adopting an on-going Writer-in-Residence program

to encourage an interest and respect for books and aspiring writers at an early age.

- b) By the Arts Council resuming the Writer-in-the School program, funded through the Canada Council.
 - c) By a varied and on-going program within the sector for the development of professional writers, including such elements as:
 - . writers' workshops, including marketing workshops
 - . writers' festival
 - . writers' competition
 - . writers' retreat
 - d) By upgrading current writing courses at both Holland College and U.P.E.I. to include marketing and business skills.
 - e) By a regular annual awards program for accomplished writing by Islanders, in designated categories.
- 3) Marketing Assistance

The present market for Island writers needs to be fully exploited, especially the potential market represented by government. This latter can be assisted by government itself:

- a) by using Island writers to the fullest extent possible when commissioning custom work;
- b) by developing a policy on providing Island publications in public libraries;

- c) by establishing Island Book Sections in P.E.I. school and public libraries.

There is a broader marketing support function which involves a recognition of writing as a business. Just as the fishery and agriculture industries involve a combination of producer, processor, and exporter, so to do the cultural industries. Within the literary arts the writer is the primary producer, while the publisher processes and exports, where the former cannot do so unaided.

There is therefore a need to provide marketing assistance to writers as to other sectors, on a progressive basis as the sector expands, encouraging access to even remote markets. The Association for the Export of Canadian Books has a program for the current year to assist in marketing and sales of Canadian works abroad, but the Island publisher may require assistance to capitalize on these programs.

4) Directory of Writers

To facilitate the increased visibility of writers, it is proposed that a directory of Island writers be issued annually by the Arts Council for the benefit of public and private sector interests who may require the services of professional writers from time to time. This directory would be along the lines of a similar effort in the Province of Nova Scotia, and would help achieve an understanding of what writers can do for possible clients other than through extended consultancy studies.

5) Organization

As in other sectors of the cultural industries, the Literary Arts suffer in its development from want of an effective

organization to promote the sector, to advocate for its interests, and to carry out the kind of activities suggested above. Even if funds were suddenly to be made available for any of these activities, there is at present no representative organization to carry them out.

The P.E.I. Council of the Arts may have an important role in support of this sector, through establishing within its corporate structure a Literary Arts discipline group which would not be bound by the conventional membership definitions of national bodies. There is a need on P.E.I. for a small body representative of professional writers who write for pay, and who are willing in turn to undertake collective action to advance their profession. Numbers are not as important as a legitimate organizational base, and an assertive leadership which has an industrial vision supported by a strategic plan for sectoral promotion and development.

6.0 MUSEUMS

6.1 Sector Defined

Museums are usually public, non-profit institutions, and are devoted to the collection, conservation and exhibition of significant objects representative of a culture, and to carry out research and educational programs exploring their specialty subject areas.

Museums may be devoted to specific subjects, such as science, sports, natural history, social history, art; they may be on an international, national, regional, or community scale; and they may vary greatly in the range and scope of their activities. They do not serve as arbiters of culture, but may serve as arbiters of cultural artifacts to be preserved.

Prince Edward Island does not have a rich museum history and it has only been in recent years that substantial efforts have been undertaken to preserve some record of the past in provincial and community museums.

For this project we identified the following:

Associate Museum	1
Provincial Museums	6
Community Museums	14
Private Commercial Museums	<u>6</u>
	27

Almost all museums, except for the Confederation Centre of the Arts and the National Exhibition Centre at Eptek in

Summerside, operate on a seasonal basis, usually from mid-June to Labour Day.

Only four institutions have a full-time director or curator.

Associate Museum: The museum within the Confederation Centre of the Arts has been designated as the Associate Museum for P.E.I.¹

Provincial Museums: the Museum and Heritage Foundation Act designates the Foundation as the Provincial Museum for P.E.I. The Foundation includes four historic sites (branch museums), one national exhibition centre, and the Foundation's administrative headquarters at Beaconsfield in Charlottetown.

Community Museums: There are fourteen community museums, operated by individual Boards of Directors.

Commercial Museums: The commercial museums are privately owned and independent.

A Community Museums Association exists to promote training and development of standards within the Sector.

¹An Associate Museum is a museum within a province that has met the standards established by the National Museum of Canada for participating in travelling exhibits of works of art. There is at least one such museum in each province, which is eligible upon designation as an Associate Museum to receive an annual grant of funding in support of its programs, on an assured basis.

6.2 Issues

1) Public Awareness and Recognition

The importance of preserving the story of cultural growth and development does not appear to have been recognized by any but a relatively small number of Island residents. Heritage interests consider museums important, for several reasons: they provide facilities to preserve records and artifacts from the past, which are important in the preservation of community history. They serve as a rallying point for people in their communities who have an interest in research and who are willing to contribute as volunteers if they can obtain professional guidance and assistance. In addition, they ensure that citizens can contribute mementos and heirlooms of public interest and importance to a public agency where their safety and preservation can be safeguarded. Finally, visitors and new residents look to a museum for the history of a community and for assistance in researching its past.

For these and other reasons, museum interests consider their work to be of great importance to communities in which they are located, which has not always been well recognized on P.E.I. by those they serve. At the same time, they are dependent on the public for support for their efforts and for guidance in recognizing and selecting those components of community life which citizens would want to have preserved for later generations.

Museums cannot be financed by revenue from patrons alone. Museum operators consider that it is not possible for them to become viable on P.E.I. within the next ten years, given the present level of public support. They express the need for sponsorships - private, corporate, and public, if the

public museum program is to grow and achieve its place among important provincial institutions. There is no evidence that a strong public awareness is developing, which is a precondition for such sponsorships; there is a need for infusion of funds to enable local awareness and support to be generated.

It is possible that the Island has more museums than are required for its size, and more than it can maintain. Museums can indeed fulfill part of their function by operating on a very modest scale, and on a seasonal or part-time basis, but for a full museums program, a number of community museums need to operate on a year-round basis. That is not possible at the present time.

2) Standards

Museums tell a living story which must be constantly renewed as their subject matter evolves and their mode of presentation changes. This renewal requires two things:

- a) Continuity in staffing: staff need to be assured a longer work year, reflecting the year-round effort required to upgrade and change exhibits and presentations, and to carry out appropriate educational programs. Not all museums will be able to afford year-round operations, but core museums should be established in each major region of the province to operate on a year-round basis and provide continuity of support for the whole museums system.
- b) Province-wide standards: consumers should be assured quality presentations when they visit any museum on P.E.I. This requires training for curator-managers in such areas as:

- research
- collection policies and management
- conservation
- exhibition
- education and public

With improvements in standards of presentation Island museums can be developed so as to enrich the resource base of Island communities. At present there is a widely varying quality of presentations and there is no authority to bring about improvements in standards.

3) Funding:

Provincial Government funds available to the fourteen community museums currently total \$3,000 per year - an amount which is considered almost meaningless by museum interests in relation to any kind of programming. Community museums find themselves pitted against the provincial Museum and the Confederation Centre of the Arts in seeking improved funding, which has not encouraged amity in this field.

Present needs are for:

- a) a long-term funding plan, covering a 10-15 year perspective, to help rationalize the museums system. Within the long-term plan, there should be provisions for an area curator in each region of the province, with year-round professional staff serving in support of community and private museums and volunteers noted above.
- b) Base-funding by government would then encourage contributions by local communities and private donors,

which must be developed as supplementary funding sources.

A long-term museums funding plan would recognize the critical role of government in the development of museums in the province. This could include, for example, the identification of major heritage themes meriting special preservation efforts, and the designation of various museums as responsible for assigned portions of the Island heritage story.

4) School Support

Museum schedules reflect only limited interaction with educational programs. The Island Studies Program of the Department of Education does not incorporate use of museums, and school teachers are not trained in how to use them effectively for school purposes. School tours are not ordinarily available, except on a restricted basis at Basin Head and Orwell Corner, and several community museums. Thus students do not obtain an orientation to the use and value of museums, except possibly through family initiatives in the summertime. There is a need for sectoral interests to work with the Department of Education in order to improve use of museums in the school program.

In order to attract children, museums must be enabled to present lively, interesting, and changing stories covering a wide variety of subjects relating to their main theme. This is only possible through continuity in staffing, enabling curators time for research and for improving their presentation skills in accordance with client demands and responses.

5) Tourism Orientation

Public museums exist primarily for the preservation of the culture and heritage of a community, and are only incidentally devoted to the tourist trade. However, their present orientation is almost entirely towards tourism, as their yearly operating schedule suggests.

The bulk of present trade is generated by tourism rather than by Islanders. Increasing numbers of tourists come looking for interesting cultural experiences and a sense of the Island life. Museum exhibits can feature different aspects of Island life in ways which complement one another, and highlighting the special values which have characterized Island people.

However, this contribution is weakened by poor exhibits and standards, or by properties which have deteriorated. The Green Park Museum, which has a central place in the Island story, was described by sectoral representatives as an eyesore and an embarrassment which creates a bad impression for visitors.

6.3 Proposals

1) Organization

There is a lack of common purpose uniting the twenty-seven museums within the four types identified. This may be the result of either a leadership vacuum, or the absence of a perceived mandate for organizational leadership.

It is evident that the issues identified in this report will not be resolved without organization and deliberate effort to that end. The Community Museum Association should be

mandated to establish a voluntary province-wide museums association to include, on a voluntary basis, commercial museums, and provided with resources to implement an expanded province-wide program for the promotion of standards and training.

2) Standards

The resolution of the issue of authority and responsibility for standards in the museum field in the province will make it possible to achieve advances in this area. Standards need to be established with respect to collections management, conservation, and exhibition.

In addition, museums need to be encouraged to develop their research and educational programs, and to maximize their use of volunteer support in behalf of their objectives. This latter will require special training programs for volunteers.

3) Public Museums Policy

Museum interests should work with government in establishing a provincial museums policy, which would designate what the province is about in this field and also provide for an interactive system, the adoption of standards and the designation of year-round facilities. Base funding for such year-round facilities would then be necessary within a provincial policy.

Year-round facilities would have a primary focus on educational objectives, with only a secondary emphasis on tourism.

4) Improved Funding

A new rationalized funding program should be established to permit museums to:

- . expand their seasons
- . retain and upgrade staff
- . improve presentations
- . set standards

All of these are important if Prince Edward Island is to have a museums system appropriate to its culture.

5) Private Sector Support

A Provincial Museums Association should promote corporate and private sponsorships, including provision for tax advantages for all contributors. It should establish a select provincial committee whose sole function would be to promote corporate and private sponsorship, with appropriate recognition.

6) Tourism Association and Department

Tourism interests and the Association should cooperate in establishing standards for listing museums in promotional literature, and for protecting the use of the term "museum" in the interest of all patrons.

7.0 Performing Arts - Music

7.1 Sector Defined:

We are considering this component of the Performing Arts separately because it has characteristics which are unique and which have made it difficult to capture with any degree of precision.

We have defined the music sub-sector as including Island residents who regularly derive income from music. There is, however, no form of registry and no other source of information whereby performers can be identified. We have been provided with estimates that there may be from 100-125 performing groups in the province, in the following music categories:

- . traditional
- . country
- . rhythm and blues
- . rock
- . jazz
- . classical

In addition to the bands there are also many individual performers who play music on a custom fee basis for special occasions, such as for weddings and ceremonial events.

For this project we were assisted in identifying by name 50 orchestras which were active Prince Edward Island in late 1987, but we were advised by music interests that there may be as many more to be found throughout the province, given a more intensive search. In all, there may be as many as 700 people in the province who perform for pay in the music

field; half of this number possibly average \$3,000 gross income per year each, and the remainder less.

Out of the total of active performers, informed persons estimate that approximately 25 musicians are full-time professionals attempting to derive their living solely from music; most of these reside in the capital area.

In addition, there are approximately 64 full-time and part-time music teachers in the province's school system, and more than sixty others who teach privately. Backing them up is the Music Department at the University of Prince Edward Island, mentioned here for the sake of recognizing its importance although it is outside the terms of reference of the study.

The dynamics of this sector are of special importance. Music groups seldom represent set-piece operations. While some have been together for as long as 25 years, many are continuously forming and reforming, taking new names as key members change. Some are together only for a season, while others operate year-round. Their composition may vary from the one and two-persons groups to those with 6-8 members, and on up to the 65-member P.E.I. Symphony Orchestra.

One person may be a member of several groups, even leading one while performing as a member of others. Members are selected on a most casual basis, usually on the basis of one member hearing of or knowing a new musician "who might fit in". While music teachers may frequently be found in performing groups, these may also include people from every walk of life - garage mechanic, clergy, fisherman, physician, dairy manager, homemaker, engineer, and business owner. It is thus a very volatile sector, whose full dimensions are extremely difficult to define.

The value of this sector to the community can be expressed in many ways, in addition to its economic value:

it provides music for a great variety of social and community needs, from the sacred to the profane;

it provides a setting for a substantial amount of social interaction, especially on the part of youth;

it enables a people to express their own moods and feelings in their own musical idiom and language, therefore avoiding dependency on non-indigenous sources of musical expression.

7.2 Issues

1) Recognition

Music and the contribution of musicians is taken as a given in modern social life. Despite the everyday uses and importance of music, and its great variety of forms and applications, there is little apparent consideration given to the nurture of the music-makers.

Music contributes in a very special way to the character of community life; it is used for purposes of state, for worship, for entertainment, for festivity, for comfort, for communication. Music draws crowds for many events, for fairs and parades and community social gatherings. It has endless applications, and has served all races of people in all ages.

Music has provided a release for people who have experienced stress and tensions in their lives. In fact, music and bands have often served as a means for socialization on the part of youth otherwise limited in social and communication

skills. Music itself is a universal language, sometimes sufficient in itself to create understanding across communication barriers.

Further, Island musicians have established that they can compete with the best; on occasion they have achieved national and even international recognition. Two young Island groups - Haywire and Screaming Trees - recently placed high during international competitions in Japan. Angele Arsenault is an internationally recognized music personality, as is Gene MacLellan; Stompin' Tom, Don Messer, and others achieved recognition outside the province.

Despite its immense social importance and varieties of social purpose, the supply of musicians and creation of music on P.E.I. has been left largely to chance, to the interest and initiative of individual youth. Musicians may spend many thousands of dollars on their instruments; they frequently perform for low wages and little recognition, sometimes even with the expectations that they do so free of charge. As musicians, they have little job security and are vulnerable to injury of one form or other which may shorten their careers, which of themselves do not prepare musicians for other work.

Musicians will continue in their efforts, pursuing what one of their number has referred to as their "dreadful talent" with its attendant risks, because they seem to have no option. Their wants, as expressed in this study, are quite modest, and begin with recognition of their importance and their contribution, and greater opportunities to play and entertain. This is especially the case with those who have an interest in classical music.

2) Music Education

The contribution of music to society is strengthened and enhanced by music education. While many musicians in popular bands have never studied music, those who have done so consider that it has greatly increased their range and career possibilities. As a result of music education, they have acquired an improved understanding of the basic principles of music, can read and adapt musical scores, and can work within the full range of their instruments.

While the music education within the school system has been described as good, the average time allocated to this subject in elementary schools is 75 minutes per cycle, fewer than 40 hours per school year, or less than 4% of the school year. The assignment of teacher hours is controlled by student-teacher ratios, and by the amount of time remaining after the "basics" or core subjects are covered. Any new subject added to the curriculum are at the expense of other "non-core" subjects, and other interventions, such as storm time, may be at cost to these subjects.

3) The Business of Music

Bands and orchestras ultimately constitute a form of business, calling for well-developed skills on the part of their leaders in the basic management functions: organizing, directing, planning, coordinating, and controlling. Bookings and transportation must be arranged, players or replacements recruited, cash flow secured, books and accounts established and maintained, reports prepared as requested by law, and so on. In addition, product, product development and customer requirements must be constant concerns, as well as marketing and sales. Thus a most

important factor in every orchestra is its leader-manager, most frequently the same person.

A foremost consideration for musical groups is the issue of the initial financial investment - setting up the business: recruiting the band, purchasing equipment (instruments, sound system, transport van), arranging practice rooms, taping, etc. Most groups begin without consideration of the essential business arrangements, which tend to get dealt with on-the-fly. Frequently they are assisted by supply firms with a direct stake in their success, such as through rent-purchase arrangements.

It is the business side of music which presents the greatest difficulties and the least rewards for musicians.

4) Marketing: (Bookings and Performances)

Island musicians - bands and orchestras - experience major limitations because of the size of the Island market and the sparse demand for live performances. Bookings typically cost about \$100 per member per performance, or \$500 for a five-member group. Such costs require an established gate, and these are not in sufficient supply to accommodate all groups all year round. So-called disco parties also cut into the market, with pre-recorded programs substituting for live performances at social events.

In addition, there are no booking agencies on the Island and no central listing of available bands. Some groups become established as house bands, such as for a Royal Canadian Legion Branch, or a community hall, but others must shop around. Some customers, such as high schools, will turn to a mainland booking agency as a matter of convenience rather

than seek out lesser known but perhaps equally competent Island groups.

Other groups, such as jazz bands and symphony orchestras, experience an even more restricted market on Prince Edward Island. The P.E.I. Symphony has an annual budget of \$53,000, and can count on performance revenue to cover no more than 30% of its costs. It is not unusual for classical groups to have to perform at personal cost to the musicians.

These situations limit the exposure which musical groups are able to obtain on P.E.I. and thus makes it difficult for them to become firmly established in music as full-time professionals. It also restricts the opportunity for Island musicians to write or perform original works. Radio also represents a constraint on new and original work because of its use of standard play-lists prepared by centrally located services. Public taste becomes influenced by these play lists, and musical groups then must accommodate the public tastes rather than develop an indigenous music.

5) Infra-structure

Again because of the small size of market and the industry on the Island there are other disadvantages.

Practice rooms: even when bands have an opportunity to practice there is scant availability of practice rooms, and almost none equipped for this function.

Equipment purchase: there are only five firms supplying music equipment on P.E.I., two of which deal primarily in organs and pianos;

Instrument repair: only one Island firm offers a general instrument repair service;

Truck/van rentals: vehicle rental firms restrict van rentals to persons over 21 years of age, and also require credit cards up to age 25. This represents a significant problem for newly-forming groups of young musicians.

Set-up/take-down times: because most bookings are on a one-night basis, equipment must be set up and knocked down each time, thus converting a five-hour program to a twelve-hour commitment.

Insurance: again, in the case of younger groups only instrument insurance can be afforded, and then only in conjunction with parental household coverage. Sound equipment and van insurance are frequently foregone because of difficulty in getting coverage, and costs.

These disadvantages more seriously affect younger performers and tend to discourage career commitments to this field.

6) Organization

There does not now exist an organization or other vehicle which would enable musicians to deal collectively with issues of common concern. They do not make much money from their art, and the demands of their combined work and music schedules do not give them a strong orientation towards meetings and organizations. Those who are professionally involved in music must work constantly for an income - one person plays in three bands plus other music-related work in order to bring in adequate income. Part-time musicians have their regular jobs, plus their after-hours commitments to

practice time and playing; a number are full-time students at school or university.

There has not been any move towards organization or unionization among musicians on the Island, and key figures will know one another only as their interests or schedules chance to coincide.

7.3 Proposals

1) Festivals:

Festivals are important for the opportunities which they provide for performers to meet and mix with other performers, and to exchange music information and techniques. They are also promotional devices, offering performers some measure of regional exposure; they also serve to increase the level of awareness of the quality of Island music among the general public.

Annual music festivals should be encouraged and promoted among all major categories, particularly emphasizing Island performers, such as has been done in recent years in the traditional music field. Assistance could be provided for one start-up festival in each category, providing funding for possibly one such festival per year.

2) Business Assistance

Small business assistance packages should be developed for bands and orchestras by way of recognizing the particular difficulties of this sector. These would include not only provision for grants or loans, but also instructional materials on management issues and problems. In addition, incorporation should be encouraged as a way of avoiding

difficulties experienced by young adults in business matters.

Bands should also be recognized as providing their leaders with schooling in entrepreneurship. In that sense they represent an excellent public investment in new business leadership, and should be recognized as such in the formulation of government Small Business Assistance policies.

3) Organization

Action on issues of concern of musicians, as in all other sectors of the cultural industries, depends largely on the existence of an organization devoted to music interest and issues.

At present this would be hard to achieve in the absence of a focal point for leadership. At the same time there are key institutions in the province with a strong and lively interest in music.

It is proposed that the P.E.I. Council of the Arts assume the lead in establishing a sectoral sub-group for music within its corporate structure, selecting individuals from the various music categories to form the beginning membership. This group would, among other things, establish an annual music forum, (possibly a combined performance and seminar experience) which would authorize collective action on issues of importance to music interests.

4) Music Awards

Musical achievement is now recognized at the amateur level through the musical festival competitions, which provides awards based on actual performance.

This should be complemented at the performance level through an annual music awards program whereby individuals and groups would be recognized for their contributions to music on P.E.I.

5) Band Listings

The music sector of the Council of the Arts should offer a voluntary listing of music groups in the province, by categories and by region, as well as a list of music teachers. This would represent an information base for all interests.

6) Travel Grants

Small travel grants should be made available for student musical groups who are not performance orchestras, covering in-province and out-of-province travel, in order to encourage youth in their musical careers.

8.0 Performing Arts - Theatre and Dance

8.1 Sector Defined

(This sector includes only theatre and dance; music has been treated in a separate section of the report.)

As in the other sectors of the cultural industries, the performing arts represent a blend of the professional; the semi-professional or seriously committed amateur seeking to become established in the arts on a professional basis, and the hobbyist. Most performers supplement their professional income through work outside the sector or through teaching. It is estimated that there are approximately 25 full and part-time professional actors on P.E.I., in addition to the larger troupe which assemble here in the summer theatre season.

Sixteen dance schools were identified in the province, the majority of which offer training in the traditional dance forms. Two schools combine theatre and dance, having a total of 430 students. The scope of the efforts of all schools was evident in the 1987 P.E.I. Dance Festival, when over 600 soloists performed in the various dance categories, having acquired the level of competence required for provincial dance competitions.

One theatre school, covering music, dance, and drama, operates in the summer season only; it is organized on a national basis and in 1987 had 39 student performers in its program.

There is no form of certification for dance schools in the province. Several are conducted by persons who have had formal dance training and professional performance

experience, which others are offered by dancers who have developed their skills as amateurs and wish to pass those skills on to others.

There were also 10 theatre groups operating on P.E.I. in 1987, in addition to the three theatre-dance schools already mentioned. In addition to the professional effort described above, there were also five local amateur theatre groups active in 1987, and about twelve more temporary groups operating out of the province's community schools. While outside the scope of the study these are of interest as representing an effort to maintain the performing arts on P.E.I.

8.2 Issues

1). Failure of Public Understanding

Islanders involved in the performing arts have not been successful in developing broad public understanding of their contribution to public life, this has resulted in a situation of insufficient public support and inadequate public policies and funding for theatre and dance, including for performing groups and schools.

There are two important aspects of creative art: the creative act itself, and the response of audiences or customers to that act. It is through the encouragement of customer response that opportunities in the various cultural industries can be expanded. While this implies improved marketing and promotional activities, it also involves strong public endorsements by highly visible personalities and institutions within the community. Public understanding of and support for the performing arts could be encouraged by government agencies and personalities taking a lead role

in patronizing, endorsing, and sponsoring their efforts, wherever and whenever possible.

Support in these fields should not be primarily directed to the individual performer or artist, but to the production companies or theatre groups which assemble their work for public use and consumption. It is the production company that makes theatre possible, and it is at this level that there should be participation by the performing arts groups in assistance or subsidy programs.

2) Performing Arts as Educational Process

The performing arts have a special standing within the cultural industries, in that a theatre presentation may encompass all of the arts:

- writing
- music
- design
- dance
- graphics
- visuals
- costume
- technical/applied arts
- acting

Students involved in the performing arts acquire a wide range of very practical skills, beyond actual performance. These include all of the front-of-house administrative and management type activities, and all of the back-stage crew, technical and design related work. There is an extensive range of experiences offered through student performances, and broad career options are suggested thereby. For this reason an arts program within the school system can be entirely pragmatic; to recognize as much one only need reflect on careers which can be suggested by school plays, including opportunities for training in business methods and business management.

A number of individual teachers have attempted to offset school policy shortcomings each year in carrying out school productions, but do so without professional support, and without adequate resources and facilities.

Budgetary policies applied to the performing arts in the school system results in a situation whereby students are denied access to programs which they desire and from which they could benefit, both academically and in many other ways. A comparison was made between athletic and sports programs, which are well organized within schools, with substantial budgets and generous indoor and outdoor facilities and equipment, and cultural activities which do not receive similar largess. Dance training is done in gymnasias, sometimes on dangerously equipped stages; where programs are not available in the schools, transportation is not provided to off-campus locations where it may be available.

The contrast between culturally-related activities and sports-related activities suggests a strong male bias in resourcing and organization, in that sports have traditionally being organized around the concept of team-sports for boys. Those students who elect arts options over sports frequently must exercise those options at their own expense, unlike in the case of school sports programs.

Art and culture deal with distinctly human issues and experiences, and involve some measure of sensitivity and understanding on the part of those who would pursue activities and studies in those fields. These are not generally recognized as distinctly male qualities, but have been traditionally identified with females. The educational system, from elementary through the graduate school, thus continues with its historic leanings towards dominant male

preferences, which distinctly includes sport and distinctly excludes culture.

3) Lack of Core Funding

The four regional theatres on P.E.I. - at Westisle, Evangeline, Victoria and Georgetown - have a combined seating capacity which exceeds that of the Confederation Centre of the Arts. The Victoria Theatre, for example, represents 12 summer jobs, and it brings 100-150 to the Village for each performance. These people patronize the local tearoom, gift shop, and gallery. The theatre has helped bring new life to the community over the past several years, and its experience reflects the contributions of regional theatres wherever they are located.

These regional theatres are managed to a large extent by volunteers who must undertake a wide variety of duties, from financing, to public relations, to technical support. Their efforts could be made much more productive with assurance of core funding to cover base costs for starting up theatre operations each year.

Whereas regional theatres cater in about equal parts to a local and tourist trade during a short summer season, Theatre P.E.I. provides Islanders with access to live theatre throughout the remainder of the year, bringing performances - and performers - of special merit to all parts of the province and helping to maintain a lively interest in the performing arts. The potential exists for a marriage of regional theatres and Theatre P.E.I., offering Island residents a year-round fare of dramas and entertainment.

Theatre P.E.I. does not receive any financial contribution from municipal governments, and has experienced a constant level of core-funding from the P.E.I. Government for the past seven years, which has depreciated considerably over that time. It is now surviving on the basis of University support and Canada Council funding.

4) Confederation Centre of the Arts (CCA)

The CCA by its very presence in the community has made a major contribution to the performing arts, by way of established standards of performance and providing inspiration for careers in theatre. At the same time it is restricted by its mandate in the contribution it might otherwise make to this sector.

While CCA has provided informal assistance to theatre groups, it is neither mandated, nor resourced, nor organized, nor sufficiently well linked to the sector to permit it to lend its great strength effectively to this sector.

CCA could greatly assist by providing a teaching and resource service to local theatre in such matters as set design, costuming, lighting, properties, graphics, etc. The National Arts Centre has a role as supplier for the nation and the Confederation Centre could conceivably exercise a similar role for the province in all of its activities if its mandate could be revised to permit as much.

5) Lack of Organization

The cultural industries are not well represented by sectoral specific organizations. Artists do not seem to organize around common interests very well. They do not have

spokespersons who can identify commonalities, or who can communicate to people outside the arts the value which cultural industries represent within the province, in economic as well as cultural terms. There is a need for some form of organization to marry the various performing arts interests in a common cause.

6) Funding Sources

Historically, Arts groups in Canada have had to rely on multiple funding sources:

- Government of Canada
- Provincial Government
- Municipal Government
- Charitable foundations
- Corporate sponsors
- Private sponsors
- Direct revenue from sales
- Investment revenue
- Miscellaneous fund raising projects

Many of these sources are not fruitful on P.E.I. The Canada Council is the principal funding agent for the Government of Canada and it has a "core company" philosophy for most of its contribution. Its regional funding is limited, and again tends to concentrate on core agencies rather than to performing arts groups.

The P.E.I. Government has practically frozen its grants program to the arts for a number of years, unlike in some other provinces. Its participation in lottery programs does not provide revenue for earmarked activities - all income goes to general revenue and remains for disposal in the

annual budget process. There is no funding source specifically dedicated to the arts.

Municipal governments provide very meager support for the arts on P.E.I. and the remaining income sources listed above are all of such a small scale that arts groups function always in financially straitened circumstances.

The situation which results is one in which assumptions are made that artists will also work as volunteers, such as when operating drama or dance schools, or when providing support to a school program. In addition, they are expected to assist in managerial and technical roles, or to provide organizational support in behalf of their professional work. They must also do this while surviving on very low annual incomes with little long-term security. It is the nature of artists that they will continue to do much of this, but the community is denied the fullness of their artistic contribution when their energies are diverted in that way.

The performing arts spokespersons urged that the Island community, through its government, rethink its funding arrangements and policies for cultural industries on P.E.I., for the present enrichment of Island life and the preservation of the special Island culture.

7) Public Policies

Because the cultural industries have limited representation within government, public policies and support programs for job creation and training do not always reflect the needs of arts organizations and individuals interested in careers in the arts. They are primarily designed for the conventional labour market without apparent consideration of the desires

of young people for careers in the cultural industries, or the sacrifices they are prepared to make in that pursuit.

One dance school director commented as follows:

"The role of the federal government so far has been negative for dance on P.E.I. Since dance in this province is only in its infancy all it can digest is teaching programs. And yet in order to qualify for a (manpower) grant applicants had to pretend that they could fulfill program requirements. These requirements demanded results achieved only in a secondary stage of dance development such as within companies, going on tour, etc. Some inexperienced dancers, hoping to fulfill these demands on paper, rushed to come up with the necessary formations and landed these grants. Unfortunately it also was the kiss of death for them since these pretend formations had no inner strength and could not survive on their own. Thus the government, instead of promoting a good brand of seed with potential to grow, promoted self-delusion in the artist by forcing the growth of flowers before the root system was established."

While training funds are now available through CEIC for this sector the conditions are such as to make them almost inaccessible, except in the case of unusual talent among unemployed people who have been twenty-four months out of the labour force. Arts interests now obtain funding through the ingenuity and generosity of public servants in stretching the parameters of program regulations, or who have skills in working the system which persons in the private or voluntary sectors cannot acquire.

A major issue for the cultural industries is in the location of a Cultural Affairs Division within the Department of Community and Cultural Affairs where, as a one-person

operation, it must compete with major departmental interests of a more powerful nature (e.g. municipal services). while at the same time advocating for a variety of cultural interests which themselves are competitive in the matter of public funding, (e.g., Council of the Arts and the P.E.I. Museum and Heritage Foundation). It is practically impossible for one officer to maintain a watching brief on all public policies impinging on the arts, or in which the arts have a legitimate stake and interest, while carrying the full range of sectoral responsibilities.

8.3 Proposals

1) Council of the Arts

A substantial restructuring and reorganization of the Council of the Arts is necessary to provide for some level of sectoral organization. The responsibilities of the Board are too broad for it to function effectively in behalf of each sector. Its function as a grants agency has also served to restrict direct access by sectoral groups to public funding sources.

The Council should be organized in two sectors, one carrying forward its present granting function and the other being a representative function for the arts.

Failing that, there is a need for a separate organization, with sectoral divisions, to provide an effective voice and rallying point for the arts community and for the cultural industries generally.

Essentially, what is necessary is an organization within which performing arts interests can function to promote public understanding of their work and advocate for

appropriate public policies in support of music, dance and drama.

2) Education

Education must be addressed at three levels:

- 1) Within the school system, which calls for a reorganization of the whole arts education program, paying proper attention to all elements of arts education, especially recognizing the value of student performance projects.
 - 2) Outside the school program, recognizing the need to associate voluntary performing arts schools with the school program in such a way as to make dance, music and drama training available at the performance level for students who wish to pursue careers in those fields.
 - 3) Summer programming should be considered, possibly through the proposed Triple Threats summer training program which could combine the Island's special summer attraction with a performance oriented arts education program.
- ## 3) Core Funding for Theatrical Groups

Core funding program is required for Regional theatres, to ensure basic start-up costs are covered each year so as to encourage their continuation. Improved funding is also required for Theatre P.E.I. in order to maintain its program schedule.

4) Confederation Centre of the Arts

Confederation Centre of the Arts should be encouraged in a review and revision of its mandate, to permit it a broader role in support of the performing arts on P.E.I., particularly in support of regional theatre and dance groups.

5) Student Exchange

In order to realize the potential for theatre companies on P.E.I., Island students should be exposed to the national arts scene through student exchange programs, or through workshops conducted by guest teachers from the theatre and dance elsewhere in Canada.

6) Technical Assistance

Dance and theatre schools should be recognized as business ventures and be assisted in applying new technologies to their work: e.g., installation of state-of-the-art sound systems; supply of dance videos, etc. Assistance to studios would be based on objective criteria, such as records of student achievement and progress, growth in student numbers, parental attendance, interest and support, audience attendance at performances, etc. Assistance would be primarily in the provision of technical aids and management assistance.

7) Arts Assistance Programs

An arts assistance program should be established for gifted students with high potential. As in the case of assistance to studios, objective criteria would have to be established, including a record of achievement and progress, record of

performance and audience attendance, parental interest and support. The evaluation necessary for adjudication of an award would encourage students with real ability to survive, and would also project a positive image within the community.

8) Public Policy Review

The office of the Cultural Affairs Director should be mandated to include a public policy review function in behalf of government, having authority to bring before any department or agency of either government for review any major program policies or operational guidelines which do not respect the real dynamics of the cultural industries or the realities of the environment in which they operate.

The Director could be assisted in that function by an agency of his choosing but it is important that he have the mandate and authority to follow up in any case where policies and procedures have been inappropriately adopted, to the prejudice of the interests of this sector.

The loss of the CEIC Job Creation Program was a major loss to this sector, which has not been compensated for in any other agency of government. While commendable, the new CEIC orientation on training rather than job creation has withdrawn from regional theatres particularly, and other arts groups, an important pool of funds.

9.0 SOUND RECORDING

9.1 Sector Defined

Sound recording includes four functions:

- . production, or recording onto reproducible masters and manufacturing reprint copies;
- . distribution to points of sale;
- . promotion in support of retail, through advertising, touring, and radio play;
- . sale through retail or mail order.

This is a growing sector within the cultural industries, consisting now of four recording studio and two performance companies which market recorded radio shows (traditional music, and sports interviews).

The four studios are not involved in direct competition, each offering a service or product to a different market. One has 8-track recording equipment; a second has 16-track equipment; and the remaining two record sound components of video productions, and also provide a mobile recording service for special events and programs.

Recording studios operate in two ways:

- i) The studio will custom-produce for an artist on the latter's initiative, providing the sound studio and technical service and possibly arranging sessional musicians, if required. The product is packaged for the artist, who pays a fee for the total service.

- ii) Alternatively, the studio may initiate a project, beginning with the concept package, recruiting the performers, and through to producing, manufacturing, and marketing the product. Performers may be paid cash or on a royalty basis.

P.E.I. has both the technical and artistic capability to produce sound recordings which are cost and quality competitive with similar studios in major centres.

9.2 Issues

1) Marketing

Sound recording studios have two types of customers: performers, and purchasers of disks and cassettes. There is a regional market for locally produced traditional and country music, and a smaller market for albums by R&B and rock groups.

The major market outlets in the Atlantic Provinces can be accessed only through major distributors headquartered in Toronto, which requires large volume production and involves high financial risk. The option is to produce music for a market which is not occupied by the larger distributors and access it through direct sales to retail outlets. This requires assistance in marketing and promotion.

2) Promotion

The traditional way to promote music is through exposure of the performing artists, both on tour and through in-house performances. Clubs are now using pre-recorded music in place of live bands, thus depriving performers of their traditional base for promoting their recordings.

In the absence of local clubs using live performers and actively promoting their groups, performers who wish to be established in the industry as full-time performing artists must look to sponsored tours. Tours to the traditional and country music market in the Atlantic Provinces and New England would help fine-tune the market segment for Island performers.

3) Financial Assistance

Government financial assistance programs have not always recognized the realities within the cultural industries. Sectoral representatives state that what begins as the "music business" must become the "business of music" if ventures are to survive. There is a need for a balanced emphasis on production and marketing. People in the industry can produce recordings of traditional music without government assistance, but need product development assistance with specialized products. Of equal importance is assistance in reaching markets, in view of the small size of the Island market itself. Small businesses on P.E.I. are often under-capitalized for purposes of promotion, marketing, and distribution; they do not have problems in developing their product, which is the area to which public programs are now being directed.

4) New Artists

There is a need for the constant encouragement of new artists in the music field, who require assistance and promotional efforts to get established. A program is required to assist them through some form of public-private partnership, such as a New Talent Demo program whereby the studios provide free studio time, with an assistance fund being available to pay for materials and technical support.

5) Festivals

In the absence of other forms of exposure music festivals can provide an excellent promotional and marketing device for performers and their music. Festivals have been successful on P.E.I. through local sponsorship, but there is a need for professional support for local volunteer effort to help these events achieve their full potential. Opportunities are being lost because the province has not been able to capitalize on and reinforce volunteer effort in this field.

6) At-home Market

Island industries could be reinforced if government, business and the major institutions would redirect to Island suppliers a portion of the money now directed to advertising and public relations operations in Halifax and Toronto. These agencies do not use any of the production capabilities of Island studios, which represents totally lost opportunities for performers in the province.

Some Island performers use studios in Sussex, N.B. and Halifax, whereas Island studios could be developed to meet their needs if their marketing expectations could be met. One performer allegedly spent \$5000 for demo tapes at a Toronto studio and for the same money on P.E.I. could have obtained 500 final prints.

7) Accessing Assistance Programs

A number of assistance programs and sources exist, including the Provincial Cultural Products Development Fund and the DOC Sound Development Recording Program. At the same time it is sometimes difficult for a business owner to be sure

that all available sources of assistance have been identified and are being fully utilized. There may be lost opportunities there because there is no office or service which provides identification of, or access and referral to, all possibilities of funding assistance for business ventures in the cultural industries.

9.3 Proposals

1) Promotional and Marketing Assistance

Government should adopt open criteria for assistance programs for the cultural industries, in recognition of the fact that their problems are not so much in product development as in market access and distribution.

2) New Product

Government assistance is desirable for new artists in recording their first product; and for encouraging new talent through technical assistance to music festivals.

3) Promotion of In-Province Market

Government should take the lead in encouraging marketing agencies on P.E.I. and its own Departments to use Island production studios to the fullest extent possible in their communications and public relations efforts.

4) Accessing Programs

Since not all Federal Assistance Programs are located here, the two governments should cooperate in designating a Cultural Industries liaison officer to assist all interests in accessing all provincial and federal assistance programs.

10.0 VISUAL ARTS

10.1 Sector Defined

The Visual Arts sector is conventionally defined as including painting, drawing, graphic art, print-making, photography, and sculpture. (Crafts are being considered in a separate report in this series.)

Within the sector, these conventions may not always be accepted. Painters, for example, do not consider that their art can be equated to photography, and photographers may distinguish between photographic art and commercial photography.

The conventions of the sector also distinguish between fine and applied art, with the latter including such fields as graphic design, book illustration, print patterns (cloth and paper), and like applications.

In addition, practitioners may be at three levels:

- . professional
- . seriously committed amateur (or semi-professional) amateur
- . hobbyist

Professionals are defined as those who are attempting to make a living through full-time commitment to their art, such as by holding a salaried position in their field or from the sale of their work. The seriously committed amateurs include those who are not able to commit themselves full-time to art but whose ambitions are to become professional with respect to it. This would include painters who regularly produce works for sale but not of a quality or quantity which permits them to be self-supporting thereby.

Hobbyists are those who derive much satisfaction and possibly even income from artistic effort but has a random work schedule with respect to it. For them art is a diversion from more practical interests in their lives. In some cases they become quite skilled and may earn income from their hobby, as in the case of landscape photographers or those who prepare wedding portfolios, or who do paintings for acquaintances.

This classification is tenuously advanced because there are artists who believe that anyone who self-defines as a professional artist is one. That kind of openness would serve our purposes if it included only the first two categories described above.

Using these classifications we were able to identify 90 visual artists and 13 photographers whom we consider to be in the first two categories and thus within the scope of this study.

The project did not distinguish between photographic art and commercial photography, in that the distinction was not acceptable to any number of photographers. Portraiture, for example, is considered by studio operators as involving art as much as technique.

P.E.I. has six permanent art galleries - three public, one co-op, and two commercial, and several private galleries which operate on a seasonal basis only.

The public gallery at the Confederation Centre of the Arts (CCA) is a national foundation which devotes its program to Canadian artists, including artists from this province.

The Eptek Centre in Summerside provides periodic displays of art works of Canadian artists, although it does not have a permanent display as in the case of CCA.

The Holland College of School of Visual Arts also maintains a gallery of works by Island artists, as well as the works of other Canadians on an occasional basis.

The cooperatively organized Great George Street Gallery is funded by the Canada Council as a "parallel gallery", which carries a requirement that it only exhibit and not retail art works. This has created a void for those artists who have been selling their work through this Gallery.

Finally, the Pavilloner Art Gallery is an entirely privately owned commercial gallery, which provides an outlet for a number of Island and non-Island artists. The owner has arranged out-of-province exhibits for artists within her family of artists, and as in the case of other galleries has assisted new artists in their efforts to satisfy commercial standards. The Savidant Gallery in Summerside is operated by an artist who also conducts an art school and vends art supplies to serious painters in the area.

10.2 Issues

1) Art Education

Art education was described by sectoral spokespersons as involving not only specific course matter but also a special approach to teaching. As content, it provides a basic knowledge of the fine arts; as teaching process, it is directed towards encouraging in students a sense of imagery, visual thinking skills, and creativity. Drawing, among other things, helps students produce imaginative effects through a combination of thought, form, and colour.

The educational system is considered by artists as being biased towards linear rather than sense experience, without

apparent recognition or attention to quality of life considerations or the contribution which art education makes to the development of one's understanding, insight, and cognitive powers. Through art education students are enabled to make a connection between school and life, emphasis on cognition as distinct from sense experience on the other hand, may result in impersonal learning experiences, unrelated to one's own self. It feeds, without nourishing.

The opinion of artists consulted was that there are many students whose academic performance could be greatly improved through an appropriate balance between the arts, science, and letters within the educational program. In schools where it has been available students have responded positively to visual art education. One artist, the product of a rural school on P.E.I., referred to a number of artists among her peers who were greatly effected by the influence of one art teacher in one school.

Opportunities lost as a result of the present situation in visual art education are considered by artists as substantial, in that potentially gifted people are denied developmental opportunities because of a learning environment which is inhospitable to art. To a large extent art on P.E.I. has been nurtured and developed by new residents rather than by the province's education system, a factor which has been cited in other sectors of the cultural industries, notably the literary and performing arts.

2) Public Perception

P.E.I. is considered to have a high representation of artists, especially in light of the limited recognition afforded them and special difficulties they must contend

with. People have moved here for the opportunity to be an artist as much as for the economic opportunity which the Island offers. For many artists an environment which is supportive of their work is a precondition of high volume sales. Because of market limitations, or their present standing in the market, they may have to seek non-art sources of income as a means to continue as artists but collectively they make up significant part of the province's cultural community.

Various artists have commented on the lack of awareness of the role and contribution of artists, of what they do and how they are of service to their community. The work of artists is constantly around us, in the decoration of homes and buildings, in what we wear, in our entertainment, in every aspect of our environment, without real recognition of its origins with individual artists. The visual artists carry forward images from a very distant past, and also maintain an important record of their own times for the benefit of future generations, but they are seldom recognized in the full light of their important social role.

3) Supplies

Unlike many producers in other sectors, visual artists must purchase raw materials on P.E.I. at retail prices, or else travel off the Island to obtain supplies. This includes art paper, canvas, clay, stones, paints, framing, and other basic supplies. In some situations a retailer may provide discounts to established artists, but the norm is to pay retail prices or travel to the Mainland - usually Halifax - to purchase in quantity, when sufficient funds have been accumulated to permit them to do so.

Similarly, there is not a print-making shop in the province to enable print-makers to develop their trade. Moncton presently has the nearest print shop available to Island artists. Thus the Island is not a convenient place for painters in developing and perfecting their art, particularly in the case of new artists with low volume sales and revenue.

4) Art Market

Prince Edward Island does not represent a strong internal market for Island artists, most of whom rely on out-of-province sales or tourists for the bulk of their income from their work.

Islanders seem more disposed to buy prints or reproductions than original works. Major business institutions on the Island will commission works through corporate head offices, to the extent that they chose to use art for internal decor. It is not unusual practice for Island business firms to use original Island art or photographic works for decorative purposes.

The P.E.I. Government offered an Island Art Acquisition program for five years, which provided both a market and exposure for Island artists. Its abrupt termination in 1987 was interpreted by the latter as a lack of appreciation of and support for art on the part of the P.E.I. Government and its Ministry.

There are few local galleries which could survive on the strength of art sales, except for the tourist trade. The Island market may become quickly saturated, making it necessary for Island artists to depend on either an export market or a tourist market generated by the reputation which

they have been able to established outside the province. Hence, out-of-province marketing is equally as important to this as to other cultural industry sectors.

Tourists now inquire at museums and craft outlets as to where they may find art studios and artists; this is perceived as evidence that a market is growing and the quality of Island art is being recognized outside the province, if not within it.

5) National/Regional Exposure

One means to expand the market for Island art is by exposure of juried artists through national tours to major galleries. Such tours are expensive undertakings because of the costs of scheduling, packing, crating, shipping and set up costs, all renewed at each point of the tour. For this reason only few tours have been organized for Island artists.

One local gallery operator referred to having made a tour of art galleries outside the province where works on display were found to be not at all superior to art produced on P.E.I. That operator is selling Island art in Ontario and New England and believes that the market for Island artists can be expanded much beyond its present boundaries.

6) In-Province Exposure

A need was expressed by artists for an annual Art Festival for P.E.I. in which visual artists could display their work much in the style of the annual P.E.I. Crafts Fair in November; suppliers could be present at such a Festival to help promote interest for new artists. This would require some measure of public sponsorship in the first year, just as government has sponsored initial marketing endeavors in other sectors.

Similarly, an Artist-in-Residence program could be adopted for Island schools as a means to increase the exposure and public identification of artists, with artists being paid at relief teachers scale to conduct art workshops of varying duration. This is done to good advantage in other provinces.

7) Teaching/Technical Advice

Art is a combination of creativity and technique and while some artists would eschew further training at the hands of peers, there are those who would recognize the value of occasional art seminars and workshops. Although the School of Visual Arts has undertaken such efforts, they have been offered by staff members already well known to local artists. It is no reflection on SVA instructors to suggest that artists would also welcome new exposures to master painters from outside the province.

8) Organization

Artists were described throughout the study as highly individualistic by nature, who are not attracted to and do not always function well within organizations. The energy required by internal politicking is beyond their level of organizational commitment, and they are not strongly attracted to overt social action.

In the absence of organization there is no body to assemble the views of artists, advocate for their interests, or take action on any of the issues of concern to them. Individual artists have little money to pay into organizations memberships, especially where they do not experience direct results. While they are represented on the P.E.I. Council of the Arts by a sectoral representative, that individual

does not himself have an organizational base within the sector he represents.

10.3 Proposals

1) Organization

Action on the issues of concern to artists will not come about without an organization to maintain interest and support for their resolution.

Because a specific association of artists is unlikely to come about, the P.E.I. Council for the Arts could help fill this void by establishing a sectoral sub-group, representative of visual artists, to provide an organizational base for their spokesperson on the Council Board and otherwise to provide for some measure of sectoral leadership.

2) Art Education

While there may be inspired painters who emerge as adults to become well-known in the art world, proficiency in this field as in any other requires a knowledge base and the development of technical skills. Art education is considered imperative to maintain a lively art community in the province. Sectoral spokespersons urged the implementation of the P.E.I. Council of the Arts proposals on art education in Island schools.

3) Supplies

The School of Visual Arts maintains a supply service for selected crafts in the province and it would seem

appropriate for it to provide a similar service for professional and serious artists.

This would not place government in competition with retailers, who in other locations would not be dealing with this particular market segment, and who would continue to supply students and hobbyists. The P.E.I. art market is too small to warrant a business effort directed towards artists alone, and the SVA is in a position to offset any disadvantage Island artists suffer as a result of this situation.

The alternative would be for local retail establishments to offer substantial discounts to juried artists; this would ensure improved relationships between artists and suppliers and represent a possibly desirable initiative by the latter.

4) Marketing

The province has provided marketing assistance in other sectors and it would seem appropriate for it to assist Island galleries to organize at least one or two tours for juried Island artists each year, as marketing ventures.

In addition, marketing assistance should be provided on a one-time-only basis to undertake an experimental Art Fair for Island artists, similar to the annual November Craft sales which are now carried out throughout the province. This would provide artists with a test of the in-province market for similar ventures on a repeat basis.

(It must be recognized that whereas certain goods have value from the time of their production, art works frequently acquire value only after many years, after the artist has become "known", sometimes posthumously. Thus artists

represent an unusual problem in relation to marketing, which merits special consideration and support.)

5) Public Awareness

Public awareness of and support for visual arts can be achieved in three ways.

- a) Government renewal of its Art Bank program and the use of works of juried Island artists to decorate public buildings.
- b) A simultaneous promotional program conducted by the P.E.I. Council of the Arts to promote use of the works of Island artists by all major institutions and business firms.
- c) Introduction of the Artist-in-Residence within Island schools, with support of the Department of Education and of Regional School Boards.

6) Art Juries

To assist in identification of artists eligible for national tours, for participation in the public awareness program, and for access to the proposed SVA supply service, it is proposed that a Jury system be adopted by the Province's "Parallel Gallery" - the Great George Street Gallery - possibly in conjunction with the Confederation Centre of the Arts, for the purpose of establishing a registry of juried artists.

7) Technical Support

Some time ago the Department of Industry commissioned a study into the feasibility of establishing a print-making shop in P.E.I. Print-makers were established here who needed such a facility but there were no entrepreneurs who had sufficient funds to establish the proposed shop.

In the absence of a representative body of artists there is no group in a position to advance such a project. It is suggested that should the Arts Council establish a sectoral sub-group as proposed above, that group should take on the promotion of a print-shop, possibly in cooperation with CCA or the Holland College School of Commercial Design which already has print-making facilities.

It is also proposed that SVA establish a vehicle for consulting with the visual arts community from time to time, perhaps through an advisory body, concerning technical support requirements for the visual arts.

7) Small Business Support

Visual artists who market their own works are in effect small business operators, carrying forward all of the conventional business functions - production, marketing, retailing. In this case the retail function should be perceived as secondary to the production function, thus enabling visual artists access to the same kind of industrial assistance program as a producer in other industries.

Where government makes a distinction between production and retail functions for purposes of its assistance programs, that distinction should be applied generously in this field,

recognizing that all artists involved in selling their own works will in most cases devote only a small percentage of their time and effort to that function.

10.4 Special Factors

One issue recognized by the Project Team but not raised by any artist relates to the role of art galleries.

Galleries may both exhibit and sell works of art - painting, drawings, photography, prints, and sculpture. They are important in bringing new artists before the public, and in presenting new exhibitions by established artists. They provide ready access to art works by collectors, dealers, and other purchasers, and facilitate artists who do not have marketing or retailing skills in reaching the public.

The impression gained in the course of this study is that there are insufficient points of contact between the major Island galleries. In that respect the galleries would seem to reflect the situation within the Arts community itself. Any possibility of realizing the Island's potential as a major arts centre will require a cooperative effort on the part of the established galleries, and some measure of assistance to seasonal gallery operators.

APPENDIX

SECTORAL INVENTORIES

ARTS EDUCATION - MUSIC

Queens County

Mrs. Theresa Arsenault	10 McGill Terrace
Ms. Nicole Belecque	Charlottetown Music Studio
Mrs. Janet Clement	Stone Park Jr. High School
John Clement	Charlottetown
Ms. Lynn Davidoff	Charlottetown Music Studio
Ms. Ellen Dempsey	Charlottetown,
Rown Fitzgerald	Charlottetown
Mrs. Elizabeth Gay	L.M. Montgomery School
Ms. Nicole Geoffrion	
Dr. Frances Gray	U.P.E.I.
Mrs. Barbara Hagerman	Ellen's Creek Drive
Mrs. Elise Hiscott	St. Peter's Road
Mrs. Kay Linkletter (Graeme)	Hurry Rd., Winsloe R.R.3 -COA 2H0
Ms. Dawn MacFadyen	Fort August School
Mrs. Madelyn MacKinnon (Mrs. Harvey)	
Mrs. Sheridyth MacNeill	Bolger Drive
Mr. Robert MacPhee	
Mrs. Faith Marie McKenney	Prince Street School
Mrs. Jane Naylor	North Wiltshire R.R.2
Mrs. Louise Pritchard	Newland Crescent
Mrs. Nancy Rackham	Hunter River
Mr. Dave Sheppard	U.P.E.I.
Cathy Schmidt	Charlottetown
Mr. Brian Stevens	Charlottetown Music Studio
Mrs. Judy Sweet	MacMillan Crescent
Mrs. Joan Thompson (Mrs. Leith)	
Ms. Marie-Claude Trudeau	P.E.I. Conservatory of Music

East Prince

Eyron Broom

Ms. Bethany Campbell Central Bedeque - C0B 1G0

Christine Gallant (Mrs. Peter)

Rosalin Gatez

Leslie George

Don Groom

104 Newson Ct. - C1N 5H8

Ms. Astrid Johnson

Mrs.. Jennifer MacDonald

Anne MacKinnon

Ms. Robin McLean

Summerside - 294 Gerry Lynn Court
C1N 4X1

Janet MacQuarrie

Mr. Tom Perry

Kensington .

Gabrella Rensch

166 Milton Ave. S'side - C1N 1T9

Ms. Nancy Rogerson

Mrs. Arlene Sorenson

Crapaud

West Prince

John Borgenson

Claude & Monique Brisson

Rachel Cameron

Lucille Fontaine

Sr. Marie Gaudet

Sr. Selina Gaudet

Angel Hachet

St. Crystostome

Antoinette Keough

MacKinnon Family

Richmond

Anne Marie Noonan

Brenda Patterson

Peter Robinson

Kings County

Lenore Andrew	Montague
Teresa Arsenault	Morell
Owen Aylward	Souris
Kathy Blackwood	Montague - Harmony Lane
Judith Gaudet	Vernon River
Molly Hammond	Souris
Catherine Knox	St. Peters
Fran McBurnie	Belfast
Pat McGowan	Montague
Carol-Anne Sharkey	Souris
Frane Shaw	Montague
Anne White	Montague

ARTS EDUCATION - THEATRE AND DANCE

P.E.I. Dance Assoc. (Bernice Wood 894-3836)

Queens County

A & M Dance Studio	Charlottetown
Burke Dance	Charlottetown
Charlottetown Ballet Theatre School	Charlottetown
Elaine Bruce	Charlottetown
Flannigan Dance	Charlottetown - 17 Andrews Court C1A 1B2
Susan Hurry	Charlottetown
June Long	Charlottetown
Montage Dance	Charlottetown
Triple Threat Theatre School	Charlottetown

Kings County

Darla Thompson	Belle River R.R.1, Mt. Vernon COA 1B0
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Prince County

Tracey Arsenault	Evangeline
Lisa Deltorta	Summerside
Lady Slipper Dancers	Summerside
Burnadette LeBlanc	Evangeline
Summerside School of Dance	Summerside
Wayne Thompson	Summerside
Elaine Wedge	St. Louis

CRAFTS
COOPS AND GUILDS

Queens County

Minegoo Indian Arts & Crafts	Charlottetown
The Island Crafts Shop	Charlottetown

Kings County

Cardigan Craft Centre	Cardigan
Crafty George	Georgetown
Log Cabin Arts & Crafts	Souris
Singing Sands Craft Shop	Basin Head
Wood Islands Handcraft Coop	Murray River

Prince County

Abram's Village Handcraft Co-op Ltd.	Abram's Village
Arethusa	Tyne Valley
Artisanat du Village Acadien Pioneer Village Handcraft	Mont Carmel
Culture Crafts Co-op (Gilles Michaud)	Summerside - P.O. Box 1647 C1N 2V5

Indian Arts and Crafts
of North America

Lennox Island

Kensington and Area
Tourist Association

Kensington

LeFurgey Cultural Centre

Summerside

Milo Womens Institute
Craft

Coleman

Old Stone Station
Handcraft Guild

Alberton

Village Craft House

Central Bedeque

West Point Lighthouse
Craft Guild

O'Leary

Windmill Craft Co-op
Association Ltd.

O'Leary

PRODUCER/RETAILER

Queens County

Cathy's Country Crafts & Collectables	New London
Cottage Road Crafts	Charlottetown
Craft Cottage	Charlottetown
Dyed in the Wool	Hunter River
Edith Frizzell	Hunter River
Frog Country Crafts	Crapaud
Gallery Gift Shop Confederation Centre of the Arts	Charlottetown
Gaudreau Fine Woodworking	Hunter River R.R.3, Oyster Bed Br. COA 1N0
Greenmount Ceramics Ltd.	Charlottetown
Ms. Wendy Himelman	Pownall
Ivy Wilde Tearoom & Craftshop	North Rustico - COA 1X0
Kimberley's Kollextables	Meadowbank
McAskill Woodworking Ltd.	Charlottetown
Memories Gift Shop	Sherwood
New London Village Pottery	Charlottetown
Of the Isle	Sherwood - 54 Oak St. - C1A 6T7
Old Forge Pottery Crafts	South Rustico, Hunter River R.R.3 COA 1N0
Orwell Fabric Arts (Eliza's Orwell Corner Historic Village	Vernon R.R.2 - COA 2E0
Queens County Blacksmith Shop	Vernon Bridge

Really-O Handcrafts	Tryon
Skipper and Mate	Little York
Stanley Bridge Studios	Breadalbane
Stoneware Pottery & Crafts	Milton
The Croft House Inc.	Charlottetown -Conf. Centre Mall 134 Kent St. C1A 3R3
The Dunes Studio Gallery	Charlottetown
The Parish House Craft Shop	Morell
The Treasure Chest Gift Shop (c/o Brenda MacPherson)	Oyster Bed Bridge, Hunter River R.R.3 COA 1N0
Unique Island Woodcrafts (Sterling Stratton)	Cornwall - Trans Canada Highway COA 1H0
Victoria Artisans Jewellers	Charlottetown
G. Willikers	York Point
Wind in the Willow	West Covehead
Windy Hill Crafts & Gifts	Stanhope

Kings County

Bayberry Cliff Studio Originals	Murray River
Belfast Woodworks & Crafts	Belfast P.O. COA 1A0
Cat and Fiddle	Murray River
Flat River Craftsmen	Flat River
Harbour Craft	Murray River - Main St. - COA 1W0
Hilltop Craft & Gift Shop	Kilmuir
Kolezar Pottery	Belle River

Magic Fingers Craft Shop (Evelyn Clow)	Belle River P.O. - COA 1B0
Mud Puddle Pottery and Crafts	Melville
Winston Nicholson Belfast Woodworks & Crafts	Belfast P.O.
Old General Store	Murray River
Rainwater Pottery	Little Sands
Shamrock & Thistle	Montague
Souris Harbour Gift Shop	Souris
The Good Life/Upstairs Crafts and Gallery	Montague
The Pines Antiques and Handcraft	Montague
The Wood Works	Gaspereaux
Tidewater Crafts and Gifts	Gaspereaux
Wolly Wares	Valleyfield

Prince County

Charlies Gem Mill	Kensington
Fern's Glass	Mill Road
Heather's Ceramics and Gifts	Miscouche
King Fisher Cottage	Ellerslie
Malpeque Gardens & Gift Shop	Malpeque

New London Crafts and Antiques	New London
Old Stanley Schoolhouse	Summerside
One of a Kind (Margaret England) Red Tassel Wood Crafts	Kensington R.R.2 - COB 1M0 Summerside
Stitches & Stuff	Chelton
The Country Parlor	Travellers Rest
The Country Store Gift Shop	Miscouche
The Knotted Den	Miscouche
The Leavitts Maple Tree Crafts	Alberton
The Must Stop Craft Shop	O'Leary
Thompson's Woodcraft	Summerside
Tyne Valley Studio and Tea Room	Tyne Valley
Victoria Tea Room Gallery	Victoria

EXPORTERS

Queens County

Cass Craft of P.E.I. Ltd.	Meadowbank
D. Major Fabric Studio	Winsloe
Downe, Ken and Carol	Hunter Vier
Island Market	West Royalty
Island Wind Crafts (Peter Baker)	Breadalbane R.R.2 COA 1E0
Kempton Jeeves	Charlottetown
Laurie Kennedy	Hunter River
Betty Moore	Southport - 19 Stratford Rd. C1A7C1
The Two Sisters	Charlottetown

Kings County

Basin Head Salt Box Factory	Basin Head
Vaughan Matthews	Murray River - R.R.4 - COA 1W0

Prince County

Yvonne Gillespie	Kensington
Needle Industries	
P.C. Industries	Summerside
Souvenir Doll Manufacture	Summerside

FESTIVALS

Queens County

Belfast Days (David Vincent)	Belfast
Blueberry Festival	Beaconsfield - 2 Kent St. Charlottetown
Blue Grass Assoc. (P.E.I.)	Dunollie Travel Park Cornwall R.R.2
Charlottetown Craft & Antique Festival (John MacKay)	327 Prince Albert Road Dartmouth, N.S.
Country & Western Music Festival	Dunollie Travel Park Cornwall, P.E.I.
Crapaud Provincial Exhib. (Debbie Carr)	Crapaud R.R.2
Emerald Days (Mary Croken)	Kensington R.R.6
Highland Games (Ron MacPherson)	Eldon, Belfast P.O.
Maritime Music Festival (Nora Jenkins)	74 Edinburgh Drive Charlottetown
Old Home Week (Kevin Gallant)	82 Westcombe Crescent, Apt. 10 Charlottetown
The Scottish Ceilidh (Chesley MacDougall) Tracadie Days (Jean Hughes)	Dunollie Travel Park Cornwall R.R.2 Map Library Dept., Transportation & Public Works, Box 2000 Charlotttettown

Kings County

Eastern Kings Exhibition (Mette Ching)	Black Pond Souris R.R.2
Georgetown Days (Kevin Gotell)	Box 232, Georgetown
Harvest of the Sea (Regan Paquet)	Basin Head Fisheries Museum, P.O. Box 248, Souris
Heritage Days Festival (Ms. Jean Shumate)	Murray River
Morell Events (Canada Day) (Kevin McLaren)	P.O. Box 72 Morell
Northumberland Provincial Fisheries Festival (Shirlerie E. Kennan)	Box 94 Murray River
Old Fashioned Tea Party (Rev.A. Charles McDonald)	All Saints Parish Cardigan
Provincial Plowing Match & Agriculture Fair (Helen Jackson)	Cardigan R.R.5
Rollo Bay Open Air Scottish Concert (Peter S. Chaisson Jr.)	Bear River R.R.1
St. Peter's Bay Blueberry Festival & Homecoming (Aquinas Ryan)	St. Peter's Bay

Prince County

Alberton Prince County Exhibition (Mrs. Erma Weeks)	Box 132, Alberton
Carleton-Coleman Country & Western Jamboree (Ms. Susan Loucks)	P.O.Box 115, Charlottetown

Carleton Day (Sandra Currie/ Elmer Arsenault)	Coleman R.R.3
Community Harvest Festival (Pat Hudson)	Box 301, Kensington
Gateway Days (Mrs. Sharon Learn)	Box 74, Borden
Irish Folk Festival (Edward FitzGerald)	Kildare, Alberton
Irish Moss Festival (Irving DesRoches)	338 Church St., Tignish
Kensington Area Tourist Days (George MacKay)	Kensington R.R.1
La Fete Acadienne (Guillaume Gaudet)	Tignish R.R.3
Le Festival Acadien De La Regional Evangeline	Abrams Village R.R.3
Miminegash Fun Days (Helen Deagle)	Miminegash, Tignish
Outdoor Scottish Fiddle & Dance Festival (Cecelia A. MacKinnon)	Richmond
P.E.I. Potato Blossom Festival (Joanne MacDonald)	P.O. Box 411, O'Leary
Prince County Trade Fair (Emerson Gennis)	267 Water St., Summerside
Richmond Summerfest (Philip Brown)	Richmond R.R.
St. Anne's Sunday (Jack Sark)	Lennox Island
St. Lawrence Scallop Festival (Lorna Costain)	Elmsdale R.R.1
St. Louis Sport Festival (Eileen Brown)	St. Louis

Somerset Festival
(Kevin McCarville)
Summerside Lobster Carnival
& Livestock Exhibition
(D.D. Carnegy)

Kinkora

Box 1295, Summerside

Tyne Valley Oyster Festival
(Roderick MacNeill)

Tyne Valley

West Point Lighthouse
(Carol Livingstone)

O'Leary R.R.2

FILM AND VIDEO

NAME	ADDRESS	CITY	POSTAL CODE	PHONE
Insight Productions	P.O.Box 2033	Charlottetown	C1A 7N7	675-3785
Island Media Arts Cooperative	P.O.Box 2726 92 Queen St.	Charlottetown	C1A 8C3	892-3131
K.M. Productions	Burlington,	Kensington R.R.		
Points East Production Inc.	P.O.Box 2703	Charlottetown	C1A 8C3	892-9819
Video Atlantic	P.O.Box 2703 West Royalty Industrial Pk.	Charlottetown	C1A 8C3	892-4173

HERITAGE INSTITUTIONS

Queens County

Anne of Green Gables Museum at Silver Bush	Park Corner
Beaconsfield (P.E.I. Museum and Heritage Foundation)	2 Kent St., Charlottetown
Confederation Centre Art Gallery and Museum	P.O. Box 848, Charlottetown
Island Wild Taxadermy Museum	Stanley Bridge, Cavendish
Jewell's Gardens and Pioneer Village	Route 25, York
Jumpin' Jack's Old Country Store Museum	South Rustico, Route 242
Lord Selkird Pioneer Settlement	Eldon
Orwell Corner Agriculture Museum	R.R.2, Vernon Bridge Orwell
Spoke Wheel Car Museum	R.R.3, Dunstaffnage
The Farmer's Bank of Rustico	R.R.3 Hunter River South Rustico

Kings County

Basin Head Fisheries Museum	P.O. Box 248, Souris
Elmira Railway Museum	R.R.2, Souris
Garden of the Gulf	160 Sackville St., Montague
Log Cabin Museum	Route 18A, Murray Hbr.
Northumberland Mill & Museum	R.R.1, Murray River

Prince County

Alberton Museum	Box 285, Alberton
Dalton Centre	School St., Tignish
Ellerslie Shellfish Museum	Ellerslie
Eptek National Exhibition Centre & Sports Hall of Fame	P.O. Box 1378, Summerside
Green Park Shipbuilding Museum	Tyne Valley, Port Hill
International Fox Hall of Fame & Museum	286 Fitzroy St. Summerside
Keir Memorial Malpeque Historical Society	Malpeque
Kensington Military Museum	Box 284, Kensington
Lucy Maud Montgomery Birthplace	R.R.6 Kensington New London
Musee Acadien	23 Main Drive East, Miscouche
Old Mill Museum	Box 1671, Summerside
Prince Edward Island Potato Museum	O'Leary
Scales Pond Provincial Historic Pk/Hydro Electric Museum	c/o P.O. Box 922, Charlottetown (Freetown)
Village Des Pionniers Acadiens	Mont Carmel
West Point Lighthouse Museum	R.R.2, West Point, O'Leary

PERFORMING ARTS - THEATRE

Queens County

Back from Away	Charlottetown
Charlottetown Festival Main Stage	Charlottetown
Iris Productions	Charlottetown -210 Dorchester St. C1A 1E6
Montage Dance Theatre Inc.	Charlottetown
P.E.I. Ballet Theatre School	Charlottetown
Theatre Bandwagon Theatre After-All	Charlottetown - 29 Hensley St.
Theatre P.E.I.	Charlottetown - UPEI C1A 4P3
The Governor's Feast	Charlottetown
The Victoria Playhouse	Victoria

Kings County

Kings Playhouse (Wild East Productions)	Georgetown - P.O. Box 59 COA 1L0
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Prince County

The Flyers Feast	Summerside
West Prince Theatre (West Prince Arts Council)	O'Leary

PHOTOGRAPHERS

Queens County

Wayne Barrett	St. Catherines - P.O.Box 2385	C1A 3C1
Paul Bell	Breadalbane R.R.	COA 1E0
Melvin Gallant	Charlottetown	
Gerald Ells	Charlottetown	
Jean Hornby	Charlottetown	
Gordon Johnston	Charlottetown - 36 Hopeton Rd.	C1A 7G1
Danny MacArthur	Charlottetown	
Winston Maund	Charlottetown	
Edith Robinson	Parkdale	
Kirby Smith	Charlottetown	
Lionel Stevenson	Charlottetown	

Prince County

Elaine Bailey	Summerside	
Michael Landry	Summerside	89 Harvard St. C1N 1P5

BANDS

(Contacts shown in brackets)

Queens County

Amber (Tony/Shirley Argent)	Mount Stewart
Area Code 902 (Jack MacDonald)	Charlottetown
Blue Crystals (Bunny MacLaren)	Charlottetown
Brown & Godkin (Rick Brown)	Charlottetown
Cabaret Five (Keith Robertson)	Charlottetown
Charlottetown Chamber Music Series (Lynn Davidoff)	Charlottetown
CIA Tracadie Music Centre	Tracadie
Coaster (Lewis MacInture)	Mount Stewart
Country Express (Gary Burke)	Charlottetown
Country Steele (Gordon Myers)	Hunter River
Dino Dunsford and the Capitals	Charlottetown
Follow That Car (Jody Weale)	Charlottetown
4-Wheel Drive (Tony Gallant)	Charlottetown

Image (Brian Knox)	Charlottetown
Island Express (Geo Brothers)	Hunter River
Josie Pye	Charlottetown
J.R.'s House Band (Peter Burke)	Charlottetown
Kelly & Gary (Kelly Buote)	Rustico
Lacking Country (Allie Peterson)	Charlottetown
Midstream (Denis Boudreau)	Charlottetown
Fancis McKenna	Pisquid
Moe & Joe (Joe McGarry)	Charlottetown
Network (Rudy Gillespie)	Charlottetown
Newfoundland Show Band (Gerry/Tom O'Grady)	Charlottetown
Parts Dept. (Davis Ward)	New Haven
Rock Island Blues (Julian Spears)	Charlottetown
Rufus Smith Orchestra	Tracadie
Rumors (Fraser & Sharon Cameron)	Charlottetown
Shawn Ferris Trio (Shawn Ferris)	Charlottetown
Singing Strings (Jan Clement)	Charlottetown

Still Rockin
(Allan Gregory)

New Haven

Stephen Toole

Green Road

Tremtones

Tropics
(Daren Ings -
Jim Gallant)

Charlottetown

Vessey's Band

Churchill

Elliot White Band

Cornwall

Conn Zaat

Charlottetown

Kings County

Bullet
(Marilyn MacDonald)

Cardigan

Chaisson Family Band

Rollo Bay

Garth Gillis Orchestra

St. Theresas

Prince County

Blue Explosion

Tignish

Ellis Family Band

Summerside

High Tide

Summerside

Misty Waters

Summerside

Peter & The Rockets

Summerside

Reflections	Summerside
Shattered Image	Summerside
Shilo	Wellington
Whiskey River	Summerside

(Bands later identified but not located.)

Club 17
County Line
Diablo
Fancy Free
Honest Frankie/Fiddlin Slim
Brian Hood
Illegal Seizure
Kickin' Country
Little Bit of Heat
LTD Edition
Night Shift
Repeats
Reubin Smith's Orchestra
Screaming Trees
Shine
Short Cut
The Dynamics
The Press
Thunder Mountain Band

VISUAL ARTISTS

Queens County

Adrien Arsenault	Charlottetown
Marie Basiletti	Cornwall
Gordon Bellamy	Charlottetown
Eileen Bentley	Charlottetown
Claire Bourque	Charlottetown
Barry H. Budgen	Charlottetown
John Burden	Charlottetown
Monica Callaghan	Emyvale
Sandy Carruthers	Charlottetown
Neil Chodorow	North Wiltshire
Stephen Clement	Crapaud
Vicky Allen-Cook	Little York
Isabel Court	
Catherine Cudmore	Brackley Beach
Sandy Dewey	Charlottetown
Terry Dunton	Charlottetown
Dorothy Gibson	Charlottetown
Eleanor Gillis	Belfast
Daphne Irving	Cornwall
Debra James-Phillis	Charlottetown
Hannelore Kennedy	Hunter River
B.C. Kinder	Charlottetown
Em Lachance	Morell
Jacinthe Laforest	Charlottetown
Ann Dow Lee	Charlottetown
Shirley Limbert	Charlottetown
John McCallum	Charlottetown
Stephen MacInnis	Charlottetown
David MacNeill	Charlottetown
Reji Martin	Cornwall
Mae Morrissey	Charlottetown
Margaret Muzika	Charlottetown

Mrs. Maryanne Palmer	Charlottetown
Michel Potenaude	Charlottetown
Henry Purdy	Charlottetown
Elsbeth Putnam	Kinloch
Andrea Redmond	Charlottetown
Pat Richardson	Charlottetown
Nigel Roe	Charlottetown
Erica Rutherford	Belfast
JoDee Samuelson	Charlottetown
Mary Smith	Hunter River
Maxine Stanfield	Charlottetown
Russell Stewart	Charlottetown
John Sylvester	Charlottetown
Alex Tissington	Victoria
Floyd Trainor	Charlottetown
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Imelda Wellner	Charlottetown
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Tim Wooner	Breadalbane
Henk Ykelenstam	Hampshire

Kings County

Brian Collins	Montague
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Dr. A.E. Ings	Montague
Regan Pacquet	Souris
Ms. Megan Power	Montague
Kevin Rice	Cardigan
Karl MacKeeman	Cardigan
Cathy Stewart	
Robert Tuck	Georgetown

SOUND RECORDING

NAME	ADDRESS	CITY	POSTAL CODE	PHONE
Blue Heron Productions	Rustico			
Marram Productions	21 Pope Ave.	Charlottetown	C1A 6N4	
lar Productions	P.O. Box 3400	Charlottetown	C1A 8W5	566-4049
Smith Sound	8 Falconwood Road	Charlottetown	C1A 6B5	892-2212
Sound Ventures	310 Queen St.	Charlottetown	C1A 4C2	894-7783

WRITERS

Queens County

Adrienne Arsenault	Charlottetown
Jim Cluett	Charlottetown - P.O. Box 1230 C1A 8B9
Marc Gallant	Charlottetown
Debbie Gamble-Arsenault	Charlottetown
Rachna Gilmore	Charlottetown
Elaine Hammond	Charlottetown
Shirley Horne	Charlottetown
Deirdre Kessler	Charlottetown
Larry LeClair	
Bill Ledwell	Charlottetown
Richard Lemm	Charlottetown
Laura Mair	Charlottetown
A.J.R. MacLure	Charlottetown - Box3383 - C1A 8W5
Evelyn Meader	Charlottetown
Janet Reeves	Charlottetown
John Smith	Charlottetown
J.J. Steinfield	Charlottetown
Ann Thurlow	Charlottetown
Brigitte Van Vliet	Albany R.R.2 - COB 1A0
Julie Watson	Charlottetown
Moncrief Williamson	Charlottetown

Kings County

Evelyn MacLeod

Little Sands

Prince County

E. Elizabeth Cran

Tignish - 335 Church St.

Irene Groboswky

Summerside R.R.2 - G.B. Site 2,
Box 8 - C1N 4J8

Mary Ready

Kensington

Kennedy Wells

Alberton - P.O. Box 105 COB 1B0

PUBLISHERS

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Prince County

Therese d'Amour	Alberton
Georgie Read Barton	Summerside
Bertha Callbeck	Summerside
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Ardis Desborough	Summerside
Katherine Dewar	Summerside
Peter Durant	Summerside
Vian Emery	Breadalbane
Edward Fitzgerald	Tignish
Elaine Harrison	Bedeque
Doreen Huestis	Summerside
Lowell Huestis	Summerside
Derek Hughes	Summerside
Eileen Ives	Summerside
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Nick Maros	Summerside
Jim Matheson	Wilmot
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Alan Savidant	Summerside
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