# The Culture Sector in PEI:
# A Labour Market Study

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**Submitted to**

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## Executive Summary

### *About this Study*

PEI's culture sector comprises a group of professionals who remain dedicated to their collective growth and development, leveraging the Island's benefits and turning challenges into opportunities to the best of their ability. It is within this context that Nordicity was commissioned by CulturePEI to conduct a study of the labour markets in PEI's culture sector.

The primary intent of this engagement was to identify opportunities and challenges for current and prospective professionals in each cultural discipline and forecast changes that would impact the cultural work force over the next two to five years.

The findings presented in this report are based on data and insights gathered through a day-long industry workshop, one-on-one interviews, and secondary research, which provided context for the study and informed opportunities.

### *The Culture Sector on PEI*

The Island's culture sector employs approximately 2,000 people, which accounts for nearly 2.5% of PEI's overall workforce.[1] The cultural labour force is spread across multiple, sometimes overlapping creative disciplines, and is comprised of artists and arts professionals who often also work in other sectors of the economy.

The labour market study examined 11 disciplines overall, including Museums & Heritage; Libraries & Archives; Visual Arts; Crafts; Music & Sound Recording; Film & TV; Interactive Media; Writing & Publishing; Theatre; Dance; and, Multi-use Venues and Facilities. In addition, transversal disciplines were considered, including professional services and arts administration.

### *Sector Support Organizations*

The various disciplines that make up the culture sector on PEI are supported by sector-wide as well as discipline-specific organizations and programs, at the national, regional and provincial levels:

- Sector-wide support at the national level, generally through funding programs, is provided through Canada Council for the Arts and the Department of Canadian Heritage;
- At the regional level, sector investments may come from the Atlantic Canada Opportunities Agency (ACOA) under broader economic development programs and initiatives;
- Within the province, organizations and individuals in the sector benefit from general support programs through Skills PEI (i.e., for training and skills development) and Innovation PEI (i.e., for entrepreneurship and business development support),
- Sector-specific initiatives in the province are led by CulturePEI (e.g., through research, training and skills development, and entrepreneurship internships through The Hive

[1] Hill Strategies Research, based on the 2011 National Household Survey data estimated the total number cultural workers on PEI to be 1,900, not significantly different from previous estimates based on the 2006 census data and CulturePEI research. Hill Strategies (2014), "Artists and Cultural Workers in Canada's Provinces and Territories," *Statistical Insights on the Arts*, Vol. 12, No. 3; CulturePEI (2013), *Culture Sector Training Report*.

program) and the PEI Council of the Arts (e.g., through grant programs, public art funding, residencies and other initiatives).

There are also several national and provincial discipline-specific support organizations that offer funding or other initiatives benefitting the Island's artists and arts professionals.

***The Cultural Labour Force***

While digital disruption is by no means a new challenge in the culture sector, the impacts of new digital technologies and consumer/audience behaviours continue to pose challenges to all disciplines in the sector, albeit in slightly different ways. The cultural workforce continues to grapple with:

- Navigating through transformed business models;
- Demand for 'beyond the walls' experiences;
- The ubiquity of access to information and expansion of user-oriented programming; and,
- The challenges associated with preserving, distributing and/or presenting digital material.

The digital marketplace, however, seems to be a 'double-edged sword,' presenting both opportunities and challenges. In this context, barriers to accessing the market are lower than ever before, while at the same time, access to technology is essential and discoverability is more challenging.

At the same time, balancing the pervasiveness of digital consumption, audiences also crave direct and personal engagement with the cultural products they consume, a trend that has manifested in various creative disciplines. This trend is illustrated, for example, by the growth of the live music segment and the prevalence of local arts festivals across Canada.

As the sector continues to evolve in response to these changing dynamics, the cultural workforce must also respond to emerging market trends. The culture sector has, as a result, experienced a rise of entrepreneurship, with artists self-managing and self-promoting more often than ever before, but also requiring more advanced digital skills to do so. At the same time, economic opportunities in the sector remain limited, and artists and arts professionals are doing more with less, leading to increased difficulty in attracting and retaining creative talent.

***The PEI Advantage***

Given PEI's unique characteristics, it is no surprise that cultural workers on the Island are significantly impacted by where they are located. There may be challenges given the Island's size and relative geographic isolation, but there are also many advantages associated with living and working on the Island. The advantages that were highlighted most consistently throughout consultations were:

- The high quality of life and low cost of living;
- The initiatives of local support organizations; and,
- The sense of community.

Above all, artists and arts professionals pointed to the Island identity, not only as a source of pride and creative inspiration, but also as a highly valuable brand asset.

***Labour Market Challenges facing PEI's Culture Sector***

Nevertheless, the sector and all its creative disciplines continue to face challenges. In some cases, these challenges are specific to the unique characteristics of each discipline. For example, some disciplines were found to be hampered by specific gaps in the value chain, such as sound recording in music, or commercial agents in the visual arts and crafts. On the other hand, other disciplines such as museums, multi-use facilities, and music (in particular live music), were far more impacted by the challenges associated with seasonality in demand than others.

There are also challenges that are shared among artists and arts professionals regardless of their discipline. Shared challenges include limited economic opportunities, lack of infrastructure, limited access to digital and entrepreneurship skills development resources, and a need for increased networking and knowledge-sharing among creative professionals in all disciplines.

***Looking Ahead***

In light of these challenges, the aim of this study was to identify opportunities to realize the potential of the cultural labour force and remove (or at least, reduce) barriers to growth. The opportunities identified in each discipline are summarized on the following page.

In addition, the findings of this study led to the identification of sector-wide actions with the potential to improve the ability of all creative disciplines to develop, attract and retain talent, including:

- Initiatives that require a lower level of effort, could be implemented in the short-term and are likely to be impactful, such as:
    - An online culture sector forum, marketplace or 'agora' to leverage the collaborative nature of the sector,
    - Improved regional integration, to maximize the benefits of collective resources,
    - Expansion of the showcase model from music to all other cultural disciplines,
    - Coordinated youth volunteer training to promote careers in the sector,
    - A 'standing committee' on culture to organize efforts and strengthen the voice of the sector; and,
- Initiatives that require a relatively higher level of effort and may take longer to implement, with the potential of having significant positive impacts on the cultural labour force, such as:
    - PEI100, a network that would enable the Island's culture sector to maintain a connection with Islanders that have moved away, and,
    - Island Arts + Innovation Centre, a space to serve as a focal point or 'meeting place' for cultural workers on the Island, to encourage collaboration and facilitate sector initiatives.

Targeting the most impactful component of the culture sector – that is, the individuals creating, producing and disseminating cultural products – these opportunities and actions can serve as a launching pad for continued growth and development in the sector. Furthermore, PEI's culture sector is at the heart of defining and reflecting the Island's identity and its unique way of life, essentially shaping the province's overall brand. As such, strengthening the creative workforce has the potential to drive growth even beyond the sector's own perimeters.

| Summary of Opportunities for PEI's Culture Sector |
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| **Museums & Heritage, Libraries & Archives** |
| ▪ Cross-training within organizations |
| ▪ Leveraging and maximizing impact of student/intern placements |
| ▪ Promoting resource sharing and collaboration within discipline |
| ▪ Increasing collective advocacy efforts |
| ▪ Revisiting compensation structures |
| **Visual Arts and Crafts** |
| ▪ Increasing professionalization of the disciplines |
| ▪ Developing entrepreneurship and business administration skills |
| ▪ Increasing professional development and career advancement opportunities |
| ▪ Creating new economic opportunities through broadening the involvement of visual artists and craftspeople along the value chain and into other cultural disciplines |
| ▪ Developing PEI as an artist-friendly destination |
| ▪ Encouraging investment in and support of visual arts by other sectors of the economy |
| **Theatre, Dance and Multi-use Venues & Facilities** |
| ▪ Developing digital marketing skills |
| ▪ Encouraging innovation in content development and presentation |
| ▪ Increasing opportunities for professional development through mentorships |
| ▪ Facilitating cross-Island networking |
| **Music & Sound Recording** |
| ▪ Training 'vertically integrated' artists and music professionals |
| ▪ Increasing professional development opportunities, such as mentorship initiatives |
| ▪ Increasing regional collaboration |
| ▪ Developing skills across value chain |
| ▪ Providing export development support |
| **Film & Television** |
| ▪ 'Nearshoring' in Atlantic Canada |
| ▪ Targeting support and focusing on niche content development |
| ▪ Introducing government support |
| **Interactive Media** |
| ▪ Supporting the development of mobile games |

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| ▪ Increasing collaboration with other creative disciplines |
| ▪ Simplifying local recruitment for companies |
| **Writing & Publishing** |
| ▪ Developing entrepreneurship and digital skills |
| ▪ Increasing professional development opportunities, such as mentorship initiatives |
| ▪ Facilitating dialogue between funders and industry |
| ▪ Networking and collaborating with other creative disciplines |

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## Creating Authentic Connections: High Impact Potential Actions for PEI's Culture Sector Labour Force

As this report illustrates, the labour force of a culture sector is the raw material from which all the products and services in the sector stem. As such, taking steps to improve the potential (for success) of that labour force can have significant impacts on the success of the sector as a whole. The following are a number of potential actions that could be taken on PEI to that end.

**High Impact, Lower Effort Actions:**

- **Online Culture Sector "Agora":** Given the collaborative nature of much of PEI's culture sector, practitioners would benefit from the creation of an online forum/marketplace (or "agora"). This agora would allow members of PEI's cultural community to share experiences (e.g., with grant applications), post work/employment opportunities and coordinate events.
- **Improved Regional Integration:** As PEI's culture sector is inherently limited in scope by the size of its labour force, PEI may opt to increase the level of integration it maintains with other Atlantic Canada culture sectors. This initiative would build on the existing work being done by the Atlantic Public Art Funders (APAF), and could include 'nearshoring' some work from other Atlantic provinces.
- **Expanded Showcases:** While some disciplines in the culture sector do well in terms of self-promotion, there is a need for an increased level of public awareness for the culture sector on PEI. To this end, PEI could opt to expand existing showcases (e.g., Showcase PEI) to cover the whole sector. This initiative could build on the work of organizations like IMAC.
- **Coordinated Volunteer Training:** Many students are often first exposed to the culture sector through summer volunteer positions in heritage and other cultural organizations. As these experiences can be a 'professional gateway' into the sector, a sector-wide training initiative would be an effective touch-point for informing youth about potential career paths across the various disciplines.
- **A "Standing Committee" on Culture:** While not directly related to the cultural labour force, the conversation(s) stimulated by this report (and its research phase) should continue. To that end, PEI may opt to form a "standing committee" on culture, an independent committee comprised of rotating representatives from all cultural disciplines that would speak on behalf of the sector as a whole with one voice (in advocacy efforts) and coordinate events among the disciplines.

**High Impact, High Effort Actions:**

- **PEI100:** Modelled on the successful C100 network that supports technology entrepreneurs, PEI could develop a network to connect Islanders who have moved away to opportunities that arise at home – and to each other. This initiative would rely on one of PEI's most important assets – the sense of belonging that Islanders have when they leave – while helping local businesses re-patriate skilled workers (after they hone their skills off-Island).
- **Island Arts + Innovation Centre:** Modelled on the Made in NY Media Center, this initiative would provide a physical space at which professional development activities, exhibitions, and other events could be held. This centre would bring together several of the initiatives suggested above (e.g., co-working, training, showcases, collaboration, etc.) into a single focal point, while creating a location where cultural workers could meet, convene and work.

# 1. Introduction

## 1.1 Mandate

Nordicity was commissioned by CulturePEI to conduct a study of the labour markets of PEI's culture sector. The intent of this engagement was to identify opportunities and challenges for current and prospective professionals in each cultural discipline, and forecast changes and/or shortages that would impact the cultural work force over the next two to four years. The cultural disciplines the following report examines include:

- Museums & Heritage
- Libraries & Archives
- Visual Arts
- Crafts
- Music & Sound Recording
- Film & Television
- Interactive Media
- Writing & Publishing
- Theatre
- Dance
- Multi-use Venues & Facilities
- Professional Support Services
- Arts Administration

In addition, Nordicity was asked to conduct a certification study to guide CulturePEI, as well as policy makers and cultural businesses, in the development of initiatives to implement certifications systems in the culture sector.

## 1.2 Methodology

The findings presented in this report are based on data and insights gathered through three sources:

1. A day-long industry workshop, held in October 2014 and attended by 25 representatives from the various creative disciplines on the Island;
2. One-on-one interviews conducted with 11 stakeholders in the sector; and,
3. Secondary research, which provided context for the study and informed opportunities for certification.

## 1.3 About this document

The next section of this report begins by providing a global and national overview of the culture sector, followed by a summary of recent trends in cultural labour markets and how they are reflected on PEI.

Each subsequent section examines one or a cluster of related disciplines, in terms of the following areas:

1. *Overview of the discipline(s)*: What are the key characteristics of the discipline(s) on PEI?
2. *Role of support organizations*: Which organizations, if any, support the discipline(s) locally and/or regionally, and how?
3. *Overarching trends*: What is happening in the discipline(s) in Canada and/or across the world?
4. *Market dynamics and labour market implications*: What is happening in the discipline(s) on PEI?
5. *Looking ahead*: How is/are the discipline(s) anticipated to change over the next two to five years?
6. *Challenges and opportunities*: What labour market challenges lay ahead for the discipline(s) and what opportunities do anticipated changes present?
7. *Certification opportunities*: What, if any, certifications would be feasible and beneficial to implement in the discipline(s)?

The discipline-specific sections are followed by a summary of opportunities across the sector, identification of common opportunities among the disciplines and instances where a need in one discipline can be met by another.

The report concludes with comments on how the identified opportunities can be seized given the resources available to the sector.

# 2. Setting the Scene

## 2.1 A wider perspective

In recent years, the value of the *creative economy* has become increasingly and more explicitly recognized globally, alongside support for the potential role of culture as an economic driver. National, regional and local governments have also begun to realize culture's potential to drive growth in other sectors, such as tourism, as well as contributing to and promoting social cohesion and civic engagement.

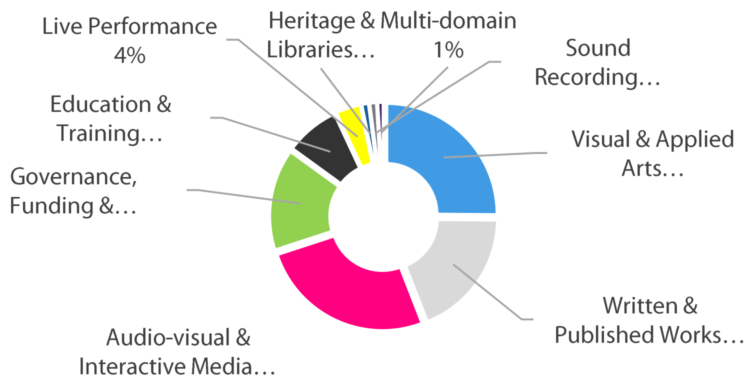
Over the past decade, culture sectors across the world have experienced accelerated growth and development. From 2002 to 2011, trade of creative goods and services around the world more than doubled to reach US$624 billion.[2] The following are some of the contributing factors to this growth:

- The professionalization of the labour force through industry-driven training;
- Support for entrepreneurship, business training and increased private and public investment in cultural industries; and,
- Integration of and collaboration among disciplines in the sector, and between creative disciplines and complementary sectors (e.g., Information and Communication Technology).
- In line with global trends, Canada has been paying more attention to the economic potential of its culture sector, most recently demonstrated by the release of the inaugural report on the Culture Satellite Account (CSA). According to the CSA, the Canadian culture sector in 2010:
- Generated $99.3 billion in total output, with a total sector GDP of $53.2 billion;
- Accounted for **3% of total production** in Canada;
- **Employed 704,000 individuals**, equal to 4% of the Canadian workforce; and,
- About **764,000 Canadians volunteered** for approximately **97 million hours** at arts and culture organizations, more than any non-profit category and equal to approximately 51,000 full-time positions.[3]
- The breakdown of impact in terms of GDP and employment is presented in Figure 1 and Figure 2, below.

[2] Sources: UNCTAD (2013), *Creative Economy Report*.

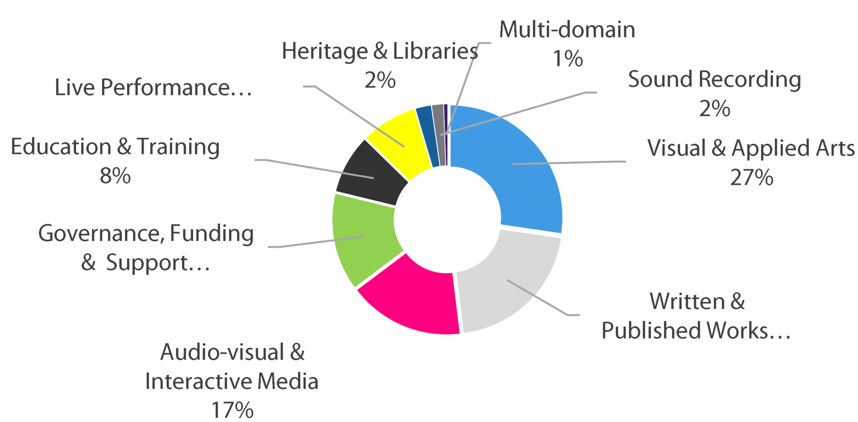
[3] Statistics Canada (September 2014), *Canadian Culture Satellite Account, 2010*.

*Figure 1: Breakdown of culture sector GDP, by domain, 2010*[4]




Among all the cultural domains, audio-visual and interactive media are the largest by GDP, with broadcasting (not included in this report) accounting for more than half of the amount reflected in the figure above.

*Figure 2: Breakdown of culture sector employment, by domain, 2010*[5]




In terms of employment, the visual and applied arts domain accounts for the largest proportion of the Canadian culture sector. Note that this domain includes design, which accounts for 65% of the employment shown in the above figure, as well as advertising and architecture. These domains, however, are not captured in this study.

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[4] Ibid.
[5] Ibid.

Approximately one out of five Canadian cultural workers are artists.[6] Compared generally to the broader Canadian workforce, artists and cultural workers exhibit some key differences, for example:

- **More artists work part-time and/or have multiple jobs:** 11% of artists and 7% of cultural workers have multiple jobs (compared to 5% overall) and artists are more than twice as likely as the average worker to have a part-time position.
- **More artists are self-employed:** Estimates of self-employment among Canadian artists range from 51% to 70% (compared to 11% to 15% overall).
- **Artists and cultural workers have higher levels of education:** 44% of artists and 38% of cultural workers hold a bachelor's degree or higher (compared to 25% overall).
- **Artists and cultural workers have a lower average income:** The average employment income of Canadian artists is nearly 40% below that of the Canadian workforce, while cultural workers earn 14% less.[7]

As discussed in Section 2.3, many of these trends are amplified in PEI's culture sector.

## 2.2 Prevailing trends and labour market implications

While **digital disruption** is by no means a new challenge in the culture sector, the impacts of new digital technologies and consumer/audience behaviours continue to pose challenges to all disciplines in the sector, albeit in slightly different ways:

- For product-driven disciplines such as music, film and television, interactive media and publishing, demand for online access to – rather than ownership of – content and a surge in digital consumption have **transformed business models**.
- For brick-and-mortar disciplines such as museums and performing arts, it has compelled them to deliver **'beyond the walls' experiences** to appeal to younger, digitally-oriented audiences and compete with the other cultural activities available in the digital universe.
- For libraries and archives, the ubiquity of access to information has resulted **in expansion of user-oriented programming** and the challenge of preserving **digital material**.

The **digital marketplace**, however, seems to be a 'double-edged sword' presenting both opportunities and challenges:

- On the one hand, online sales and audience engagement channels have **reduced barriers to accessing the market**, giving creative professionals an unprecedented level of autonomy;

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[6] Hill Strategies (2014), "A Statistical Profile of Artists and Cultural Workers in Canada," *Statistical Insights on the Arts*, Vol. 12, No. 2.
[7] Ibid.

- On the other hand, **access to technology is essential** and **discoverability is more challenging than ever before**, as those same channels have intensified competition for the attention of audiences.

At the same time, balancing the pervasiveness of digital consumption, audiences also crave **direct and personal engagement** with the cultural products they consume, a trend that has manifested in various creative disciplines. For example,

- Live music is a growing revenue stream, even as physical music sales continue to plummet;
- Local arts festivals engage communities of all sizes, even as online access to visual arts exhibitions becomes more prevalent; and,
- Performing arts audiences ascribe a higher level of importance to in-person attendance than media-based consumption.
- As the sector continues to evolve in response to these changing dynamics, businesses, organizations and entrepreneurs are compelled to continually re-evaluate and adapt their business models, and balance market demands and consumer behaviours with their own business objectives.

These changing dynamics have impacted the cultural workforce, as professionals and organizations respond to emerging market trends. The following are some broad human resource trends observed across cultural disciplines:

- **Rise of entrepreneurship:** Technological advancements have shifted the value chains of creative disciplines, often lowering the barriers for artists to access their markets directly. However, this increased professional autonomy requires that artists develop a multitude of business skills.
- **Digital skills essential:** Professionals in the culture sector require a host of new skills in order to face the challenges posed by the digitization of content, digital production methods and workflows, digital promotion and dissemination and digital consumption trends.
- **Doing more with less:** Creative businesses are generally limited by financial constraints. In some cases, organizations are reducing staff size, but requiring a wider range of skills. Cultural workers have always worn many different 'hats', and with the changing market dynamics, they are required to take on even more responsibility.

As a result, despite the fact that the cultural work force is highly educated, engaged and experienced, the lack of job permanency, fewer advancement opportunities, limited resources and weak economic opportunity results in increased difficulty in attracting and retaining creative talent and ultimately, talent drain to other, more promising sectors.

## 2.3 Reflecting trends on the Island

According to 2006 census data, PEI's culture sector employed nearly 2,000 people, approximately 2.5% of the Island's workforce.[8] The culture sector has some unique characteristics, for example,

- **The cultural labour force is entrepreneurial:** 70% of cultural workers on PEI are self-employed;
- **Cultural workers on PEI are highly educated:** 47% of cultural workers on PEI have a university degree, compared to only 21.5% in the overall labour force;
- Cultural organizations tend to be very small in terms of employment: 65% of cultural businesses on PEI employ fewer than 5 people; and,
- **The workforce is very experienced, and older:** Nearly half the workforce has over 15 years of experience, and the median age is 51.6 (compared to 38.3 in the overall labour force).[9]
- In addition, cultural workers are significantly impacted by being located on PEI, facing challenges posed by the Island's size and geographic isolation, while at the same time benefitting from the advantages associated with living and working on the Island. Specifically,
- Artists and cultural workers are attracted to the **high quality of life and low cost of living** on the Island, a common theme across all creative disciplines and a weighty factor in the decision to work on PEI;
- Artists in many of the creative disciplines benefit from the **initiatives of local support organizations**, including standout programs such as CulturePEI's Hive Program, which encourages and equips arts professionals for entrepreneurship, and Music PEI's Showcase PEI, which has enabled many Island musicians to export their work;
- On the other hand, the unique nature of the culture sector means that in some cases, the workforce **cannot access more general support measures**, such as the EI requirements of Skills PEI programs resulting in ineligibility for many artists and arts professionals; and,
- Finally, the **small scale of both the creative community and the local market** limits economic opportunities on the Island for creative professionals, resulting in some taking their careers off-Island to larger creative centres with more robust infrastructure.

The culture sector on PEI comprises a group of professionals who remain dedicated to their collective growth and development, leveraging the benefits and turning challenges into opportunities to the best of their ability. Many individuals that were consulted as part of this project highlighted the sense of community and support on the Island as a key advantage. In the following sections, the challenges

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[8] Hill Strategies Research, based on 2011 National Household Survey data, estimated the total number cultural workers on PEI to be 1,900, not significantly different from previous estimates based on the 2006 census data and CulturePEI research. Hill Strategies (2014), "Artists and Cultural Workers in Canada's Provinces and Territories, Statistical Insights on the Arts," Vol. 12, No. 3; CulturePEI (2013), "Culture Sector Training Report."

[9] PEI Cultural Human Resources Council, *Prince Edward Island's Cultural Labour Force: A Supply and Demand Study* (2008).

and opportunities facing each discipline are further explored, in an effort to inform future development of support measures that can equip the culture sector workforce with the resources they need to succeed.

# 3. Museums & Heritage and Libraries & Archives

## 3.1 Overview of the disciplines

The **museums and heritage** discipline includes individuals or organizations involved in the collection, preservation and/or public exhibition of historic and/or culturally significant artefacts or sites.

In the PEI context, the discipline primarily consists of the network of provincial and community museums, as well as a variety of historical societies.

The PEI Museum and Heritage Foundation, an agency of the Ministry of Tourism and Culture, oversees the operation of seven museums and historic sites on the Island, including:

- Green Park Shipbuilding Museum and Yeo House;
- Acadian Museum;
- Eptek Art and Culture Centre;
- Beaconsfield Historic House;
- Orwell Corner Historic Village;
- Basin Head Fisheries Museum; and,
- Elmira Railway Museum.

The PEI Museums and Heritage Foundation (PEIMHF), with roughly 13 full-time staff, 7-8 part-time staff and 30-50 seasonal (student) staff, manages these sites and the provincial collection, the *Art Bank*, which features works displayed in government offices and public spaces across the province.

In addition to these seven sites, the Island is home to 30 community museums funded by the Province, and in some cases the municipality in which they are located. These museums range in size and human resource capacity, with many being volunteer-run or operated with a staff of one or two.

The 2011 Government of Canada Survey of Heritage Institutions, which included public art galleries, historic sites, museums and exhibition centres, as well as archives and natural heritage institutions revealed the following employment figures for the Island:

- 18 full-time employees;
- 100 part-time employees;
- 153 volunteers; and,
- A total of 7,800 volunteer hours worked.[10]

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[10] Canadian Heritage (2014). *Government of Canada Survey of Heritage Institutions: 2011*.

The museums & heritage discipline also includes the Confederation Centre Art Gallery, funded at the federal, provincial and municipal levels of government.

The **libraries and archives** discipline on PEI includes three groups of organizations: public, academic and private/other. The Department of Tourism and Culture supports 26 public, community libraries, as well as the official repository of public records in the province through the Public Archives and Records Office (PARO).

Academic libraries and archives include those at the University of Prince Edward Island (UPEI) (i.e., Robertson Library, UPEI Archives and Special Collections), and Holland College (i.e., Tourism and Culinary Library, and Resource Centres in Charlottetown, Alberton and Summerside Waterfront).

Other components of the libraries and archives discipline include, for example:

- The Law Library, supported by the Law Foundation of Prince Edward Island;
- The historical records of the Medical Society of Prince Edward Island;
- Libraries and archives at provincial and community museums;
- The MacNaught History Centre and Archives; and
- Private providers of library and archiving services (e.g., Discovery Garden Inc.).

Given that museums & heritage organizations often include libraries & archives components, as well as the corresponding skill requirements and workforce characteristics between the two disciplines, the challenges and opportunities of the two are discussed in tandem.

## 3.2 Role of support organizations

All museums and heritage sites on the Island are members of the **Community Museums Association of Prince Edward Island (CMAPEI)**, a support organization dedicated to fostering the discipline and facilitating interaction between stakeholders (e.g., museums, governments, etc.). CMAPEI focuses on providing training, knowledge-sharing, professional development and collaboration opportunities to museum operators.

The Association has made significant progress in advancing the museums and heritage discipline on the Island, including through the provision of skills development and best practices workshops, development of virtual exhibitions and digital material (e.g., podcasts), heritage consulting services, and collections and museum management training and certification.

The **Government of PEI** supports the museums & heritage discipline through the Community Cultural Partnership Program (CCPP). CCPP covers up to 50% of eligible costs, up to a maximum of $2,500, of selected cultural and heritage-based activities and training and development initiatives.

Libraries on the Island are supported through the **Prince Edward Island Professional Librarians Association (PEIPLA)**, which offers professional development, networking and knowledge development opportunities for library professionals on the Island. The Association essentially serves as a 'meeting point' for the various groups of libraries on the Island (i.e., public and academic), as well as connecting the on-Island library community to broader professional communities, such as the Atlantic Provinces Library Association and the Canadian Library Association.

Similarly, the **Archives Council of Prince Edward Island (ACPEI)** provides a network for archival activities throughout the province, as well as regionally and nationally through joint meetings with its counterparts in New Brunswick and Nova Scotia and updates on the National Archives of Canada. The Council promotes, supports and connects the archives community, including historical centres, museums and libraries. It supports the development of collaborative and/or virtual exhibits, and has accumulated a database of archival holdings across numerous member organizations. The Council also provides free conservation and archival advisory services to its members.

## 3.3 Overarching trends

The following section situates PEI's Museums & Heritage and Libraries & Archives disciplines within the broader context and discusses national and international trends and market implications.

**Heritage institutions**

In 2011, heritage institutions (including natural heritage and archives) in Canada:

- Offered visitors an estimated **26,000 exhibitions**, including permanent collections and displays, newly created shows, and travelling exhibition, and hosted **3,000 online exhibitions;**
- Attracted nearly 45 million visitors in person, and 137 million online visits;
- Employed over **32,000 individuals** (11,500 full-time, 16,700 part-time, and 4,000 contract workers); and,
- Benefited from the services of nearly **96,000 volunteers** who contributed over **6 million volunteer hours.**[11]

The facts listed above highlight two key dynamics impacting museums, heritage and archives institutions. The first is the impact of digital technology on the ways in which culture and history are consumed by audiences and presented by institutions. While the number of online exhibitions accounted for only a small proportion of heritage programming, for every person that visited a heritage institution, three people accessed collections, exhibitions and information online.

A 2012 survey by the National Endowment for the Arts found that in the US, younger demographics (18-34) reported the highest rate of accessing visuals arts on a handheld or mobile device, with 11% downloading or viewing artistic products such as painting, sculpture, graphic design or photography through mobile electronic devices. At the same time, this age segment also saw the biggest decline in attendance to art museums and galleries, dropping from 23% in 2008 to 18% in 2012.[12] Given the prevalence of online access among younger generations, the shift away from physical interaction with cultural history can be expected to increase in the future.

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[11] Canadian Heritage (2014). *Government of Canada Survey of Heritage Institutions: 2011.*

[12] National Endowment for the Arts (2013). *How a Nation Engages with Art: Highlights from the 2012 Survey of Public Participation in the Arts.*

The result is a growing interest in incorporating technology into heritage organizations, which as institutions, are rooted in their physical presence and the preservation and exhibition of tangible objects. Tailoring programs to match the needs and consumption patterns of younger, digitally-oriented audiences requires not only new approaches to interpretation and exhibition, but also a new set of skills in the workforce. It also means competing with all other leisure and cultural activities available in the digital universe.

The second key dynamic is the prevalence of volunteerism in heritage institutions. Across Canadian heritage institutions, there are three volunteers per paid staff member; for museums, this ratio is closer to 4.5 to one.[13] The result is a workforce that is largely involved with an organization on an occasional or temporary basis, and therefore poses challenges in terms of skills development, engagement and career development.

**Libraries**

In 2010, public, academic and school libraries across Canada:

- Attracted **360 million in-person visits** and responded to 25 million questions asked by public and academic library users;
- Lent **590 million publications** for off-site use or on-site consultations and held 386,000 programs;
- Facilitated 69 million electronic database sessions (189,000 per day);
- Conducted 5 million interlibrary loan transactions;
- Employed **37,000 staff** (FTE) at 19,000 service points; and,
- Provided **20 million service hours** per year to Canadians.[14]

In 2013, the Royal Society of Canada commissioned an Expert Panel report on the future of libraries and archives. Two key points highlighted in the report are that:

- The digital era has not diminished the importance of libraries and archives to Canadian society, but these institutions are now **expected to deliver a wide range of services and require more resources** to do so; and,
- Libraries and archives associations and professionals, as well as all levels of government, need to leverage **partnerships** and **digital infrastructure** to mitigate the challenges facing the discipline as a result of digitization.

For libraries, previously a key source for accessing information, the issues that have arisen in the digital era are similar to museums, heritage organizations and archives. The International Federation of Library Associations, in its 2014 trends report, asks, *"…if the primary vehicle for information seeking is a privately owned algorithm, how do libraries engage?"*[15] The role of the library has dramatically

[13] Canadian Heritage (2014). *Government of Canada Survey of Heritage Institutions: 2011*.
[14] Canadian Library Association (2012). *National Statistical and Values Profile of Canadian Libraries: Report to CLA Executive Council*.
[15] International Federation of Library Associations (2014). *IFLA Trends Report*.

changed in an environment where access to information has become ubiquitous. As a result, libraries around the world now aim to better reflect their communities and provide user-oriented programming and services; they serve as learning spaces, creative labs, and community platforms.

## 3.4 Market dynamics and labour market implications

In this section, the implications of the above-mentioned trends on PEI's Museums & Heritage, and Libraries & Archives disciplines are discussed, along with their impact on the workforce.

### 3.4.1 Digitization of collections and exhibitions

Given the changing nature of cultural 'artefacts,' and the ways in which cultural 'products' are consumed, museums, libraries and archives find their collection, preservation and exhibition activities quickly moving into the digital world.

Recent examples of this trend on PEI include:

- ***Island Newspapers***, an initiative by UPEI Robertson Library, The Guardian, PEI Public Archives and Records Office and Islandora/Discovery Garden Inc. to digitize and make available online the archives of The Guardian newspaper from 1890 to 1957.
- ***Island Imagined***, an online collection of documents (e.g., maps, atlases, images, books) from the collections of the PEI Public Archives and Records Office, PEI Museums and Heritage Foundation and UPEI.
- **Virtual museum exhibits** organized by CMAPEI and funded through the Virtual Museum of Canada.
- **Museum audio and video podcasts** developed with support from CMAPEI for Beaconsfield Historic House, PEI Regiment Museums, Garden of the Gulf Museum, Point Prim Lighthouse Museum, Farmers' Bank of Rustico Museum and Orwell Corner Historic Village.
- The ***Treasures from Prince Edward Island*** **online collection** on the Canadian Heritage Information Network (CHIN) Artefacts Canada database, developed by CMAPEI.

The progression toward digitization requires a new set of skills from professionals in these disciplines and versatility to adapt to changing workflows and media. In addition, contemporary cultural material (e.g., visual art, books, news, etc.) is more frequently digitally produced and requires advanced technological skills to collect, exhibit and preserve.

However, it seems that emerging professionals in these disciplines are not only up to the challenges posed by digital cultural production and consumption, but also well-equipped to face them. Consultations revealed that training programs in libraries, archives and collections management are aligned with the needs of the disciplines. However, organizations do not always have the resources to hire new talent.

### 3.4.2 Changing marketing and promotion channels

It is not only the products and workflows that are changing, but also the means by which services and exhibitions are promoted. The overarching themes in terms of marketing and promotion that emerged in discussions with the sector were as follows:

1. Social media is an essential channel for reaching audiences,
2. Managing an organization's social media presence is equivalent to a full-time job, and
3. Organizations do not have the resources to devote staff to this task.

Rather, it seems that organizations are learning how to present themselves online on a trial-and-error basis, and tacking on this 'essential' task to the responsibilities of existing positions.

### 3.4.3 Seasonality in the museums & heritage discipline

The museums and heritage discipline on PEI is very much linked to the tourism sector. The Tourism Industry Association of Prince Edward Island estimates that each year, over 1.2 million people visit PEI, and in 2009, these visits generated $373 million.[16] Meanwhile, a study reported that 91% of visitors to PEI "visited historic sites, museums or galleries" in the summer of 2009.[17] Furthermore, tourists who are highly involved in cultural activities (roughly 36% according to a 2007 study), were found to be likely to spend more money than average in nearly all categories of expenditure.[18] Therefore, although the discipline is non-profit in nature, it is nonetheless an economic driver.

The link between the discipline and tourism results in a high level of seasonality for museums and heritage sites. As a result, the size and demographics of the staff at these institutions and sites fluctuate significantly between the summer and off-season periods. Given this dynamic, two groups of workers emerge in the museums and heritage discipline, each of which have quite distinct characteristics.

- The first group consists of a large number of **summer staff, hired on a temporary, part-time basis, often students with very little experience** in the culture sector, or any other sector. This group provides several benefits to organizations:
- **Temporary staff are affordable:** In order to fill the increased need for summer staff, museums and heritage institutions often take advantage of several labour-subsidy programs that allow them to hire on large numbers of students in the summer, including the Young Canada Works (national, 75% subsidy), Jobs for Youth (provincial, 100% subsidy) and Career Prep (provincial, 50% subsidy) programs.
- **Temporary positions can lead to future interest in the culture sector:** For the summer staff, a temporary placement at a museum or heritage site often serves as the first

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[16] Tourism Industry Association of Prince Edward Island, *Tourism and Travel Quick Facts*, available at: http://www.tiapei.pe.ca/tiapei.cfm?id=452

[17] UPEI Tourism Research Centre (2010), *Historic Sites, Museums & Galleries*, as cited in CulturePEI, *Fast facts & stats, arts and culture on PEI*, accessed at: http://www.peiculture.ca/pdfs/culture%20stats%20&%20facts,%20pei1.pdf

[18] Dongkoo Yun et al., *Typology of Cultural Tourists: An Island Study*, paper presented at the International Small Island Cultures 3rd Annual Conference.

introduction to the culture sector. Many students tend to remain connected to – and some will even go on to pursue a professional career in – the culture sector, whether in museums and heritage or other disciplines. In effect, the museums and heritage discipline (along with multi-use cultural venues), often serve as a 'professional gateway' into the culture sector.

- **Multi-generational staff offer diverse perspectives:** Museums and heritage sites also benefit from the presence of student volunteers and interns. Consultations revealed that temporary staff provide an opportunity to invite fresh perspectives, new skills and creative approaches into the workplace. In one case, it was reported that an intern 'saved the day' by proposing an innovative solution to a technology-related problem at an exhibition, and student volunteers are more likely to be adept in areas that may pose challenges to older museum staff, such as social media.

On the other hand, a large portion of incoming students do not have the required qualifications, with some selected by local MLAs rather than the hiring institutions. As such, they are not able to adequately interact with audiences or handle collections, resulting in workload challenges for museum staff.

- In the off-season, the workforce consists of a small number of **permanent, full-time staff**. This group often has a significant amount of discipline-specific experience and tends to be relatively older. In addition, given the small number of permanent staff in museums and heritage organizations and the lack of access to part-time student labour in the off-season, organizations are not always able to meet tourism-related fluctuations.

## 3.5 Looking ahead

It is not expected that the workforce in museums, heritage, archives and libraries will grow over the next two to four years. Rather, as the aging workforce retires, resource constraints will prevent replacement and the workforce is likely to shrink.

In this context, the museums and heritage, and libraries and archives disciplines on PEI will need to mitigate the following labour market challenges:

- Anticipated gaps in senior positions upon retirement of existing staff;
- Community museums challenged by limited human resources and access to variety of skills;
- Talent pool appropriately skilled, but disciplines face difficulties in attracting, retaining talent;
- Changing digital production and promotion tools require new skills not readily available to museums;
- Talent needs met in the summer, but staffing difficulties in the shoulder-season; and,
- No resources to fill employment gaps and/or retain talent.

These challenges are further explored in the following section, along with the opportunities identified in the disciplines.

## 3.6 Challenges and opportunities

| Challenges facing PEI's Museums & Heritage and Libraries & Archives disciplines |
|---|
| **GAPS IN THE VALUE CHAIN** |

**Anticipated gaps in senior positions upon retirement of existing staff**

*Impacts: New entrants, knowledge transfer/succession planning*

- The permanent staff in museums, heritage sites, libraries and archives is aging, and it is not likely that all of their positions will be preserved upon their retirement.
- Over the next 2-5 years, a smaller workforce will be required to take on more responsibilities, as the wave of retirement will be an opportunity for downsizing.
- Limited opportunity for temporary staff to build on skills, as some subsidy programs limit multiple enrolment.

**Community museums challenged by limited human resources and access to variety of skills**

*Impacts: Professional development*

- Given the small staff sizes in community museums, it is likely that specialized skills (e.g., collections management, conservation, marketing, etc.) are not present throughout the discipline.

**SKILLS GAPS**

**Talent pool is appropriately skilled, but disciplines face difficulties in attracting, retaining talent**

*Impacts: New entrants, talent attraction/retention*

- New entrants come in with necessary skills; training programs are up to date and keeping up with new workflows. However, potential emerging professionals seek off-Island opportunities as they are more likely to be full-time and stable.
- While positions in institutions were fixed 10 years ago, they are now rapidly converging/shrinking. A labour pool with highly specialized skills (e.g., library services) is difficult to retain for part-time positions, but organizations do not have the resources to offer more.

**Changing digital production and promotion tools require new skills not readily available to museums**

*Impacts: Professional development*

- New skills required to present digital works (e.g., projection, operation of various media devices, etc.). It is difficult to provide 'training' as requirements change depending on the artist and differs each time.
- Social media presents huge opportunities, but leveraging it requires resources. Museums do not have the capacity to devote one position to this task.
- Currently, museum professionals are developing/accessing skills in an ad-hoc manner.
- Access to appropriate training challenging, mostly provided on the job as needed – 'learning as you go and from each other.'

**Talent needs met in the summer, but staffing difficulties in the shoulder-season**

*Impacts: Talent attraction/retention*

- Difficult to adequately staff in the off-season to meet fluctuating, tourism-based demand.

**ECONOMIC BARRIERS**

**No resources to fill employment gaps and/or retain talent**

*Impacts: New entrants, professional development, talent attraction/retention*

- Risk of burn-out among current workforce is high – due to staff wearing 'multiple hats' – with no financial capacity to increase staff sizes.
- Difficulty in demonstrating need for arts administration positions to funders and sponsors.
- Limited by lack of funds to provide appropriate compensation leads to turn-over (to other sectors).

## Opportunities in PEI's Museums, Archives and Libraries disciplines

**Cross-training within organizations**

- Organizations can focus efforts on providing training across positions to allow shared responsibilities and avoid individual burn-out – 'multiple people wearing multiple hats.'

**Leveraging and maximizing impact of student/intern placements**

- Wage subsidy programs can be redesigned to allow repeat student placements, so that younger staff have an opportunity to build on skills and continue career paths.
- Implementation of 'reverse-internships' can encourage seasoned staff to learn from new entrants (e.g., in the areas of creative problem-solving, digital, social media marketing).
- Introduction of off-season student placement incentives can give organizations access to affordable talent throughout the year.
- Student placements that are aligned with organizational needs will allow both parties to extract maximum benefits from the experience.

**Promoting resource sharing and collaboration within discipline**

- Collaboration is happening on an informal basis, but there is an opportunity to form partnerships among organizations to maximize resources:
  - Shared human resources can increase talent attraction and retention (e.g., full-time position across partner institution).
  - Shared non-proprietary services (e.g., administration, marketing, finance/accounting, transportation, etc.) can reduce financial strain on budget.
- Collaborative initiatives across the discipline, and between disciplines will provide more opportunities for skills and professional development.
- Larger organizations can take the lead on organizing and/or 'host' training initiatives with costs shared among participants.
- In particular, there is an opportunity to increase collaboration and resource sharing between provincial and community museums.

**Increasing collective advocacy efforts**

- Advocacy for more resources is key to mitigating labour force challenges, both current and anticipated.
- Collective efforts to measure/articulate the impact of disciplines will aid advocacy efforts.
- Advocacy for strategic initiatives between culture and tourism sectors can lead to leveraging the inter-dependence between the two.

**Revisiting compensation structures**

- Adoption of performance-based compensation structure can be considered to offset fluctuating revenue streams.
- Non-monetary incentives can increase talent attraction and retention.

## 3.7 Certification opportunities

Given the efforts of support organizations (see Section 3.2) to professionalize, standardize and advance the museums and heritage, and libraries and archives disciplines on PEI, no further need for additional workplace-specific certifications was identified. In particular, research revealed that:

- Most industry standards are followed in both disciplines, complemented by the disciplines' connection to regional and national professional associations (though support organizations or larger players);
- Further certification and enforcement thereof may present the risk of stifling creativity and/or contributing to an exclusionary environment for professionals; and,
- An increase in professional certifications may compound talent attraction and retention challenges, particularly for libraries and archives (e.g., requirement of MLIS for part-time positions may make them more difficult to fill).

However, given the large number of temporary staff (volunteers and interns) that contribute to museums and heritage organizations, the discipline may benefit from standardizing training and professional development across the board, including initiatives to encourage continuing a career in the sector. This type of initiative has recently been implemented in Ontario, with the Museum SUCCESSion program, a three-year project to promote professional development among emerging museum professionals.

Finally, as discussed in greater detail in the next section, fair compensation continues to be an issue for visual artists on PEI. Perhaps the one area of improvement for museums and art galleries would be to ensure artists are fairly compensated in accordance with the minimum fee schedules issued by CARFAC/RAAV. In addition, large exhibiting organizations such as the Confederation Centre Art Gallery are well-positioned to take on a leadership role in this area by increasing awareness of and compliance with these standards across the Island.

# 4. Visual Arts and Crafts

## 4.1 Overview of the disciplines

The **visual arts** discipline includes individuals or organizations involved in the creation or dissemination of original visual art works including works in what can be considered more traditional media (e.g., paintings, drawings and sculpture), as well as relatively newer forms such as photography, new media (e.g., web art, interactive digital works) and performance art.

The **crafts** discipline includes individuals or organizations involved in the creation or dissemination of artisanal handicraft using a variety of materials (e.g., textiles, jewellery, pottery, statues, ceramics, furniture, housewares, musical instruments, etc.).

It is difficult to draw a distinct line between visual arts and crafts, or between various artistic practices and media in each. In this section, the two disciplines are discussed together over all, and differentiated where necessary. Furthermore, it is difficult at times to differentiate between crafts and functional objects. In such cases, it is often the expressive intention of the creator that qualifies the object as a crafts product.

PEI has a rich visual culture, expressed through a variety of visual arts and crafts. However, defining the size of either discipline can prove challenging, given the often informal nature of visual arts and crafts practices. Many visual artists and craftspeople practice on an occasional or part-time basis, and/or outside traditional commercial channels.

The PEI Crafts Council has a membership of about 85 individuals and organizations, while there are over 100 members in the Etsy Artisans of PEI group. Although the artist database run by the Arts Council has not been updated recently, it shows roughly 40 listings for visual artists.

## 4.2 Role of support organizations

The visual arts and crafts disciplines on PEI benefit from the presence of a strong community of stakeholders committed to the advancement of economic opportunities for professional artists and craftspeople.

In crafts, the **Prince Edward Island Crafts Council (PEICC)** continues to serve as a central support entity, working toward its mandate to "promote the making and acceptance of quality handcrafted items" and "encourage and assist those who are creating and producing the future heirlooms of Prince Edward Island."[19] The PEICC offers services, workshops and sales opportunities (e.g., annual PEICC craft fair) to the Island's crafts practitioners.

In the visual arts, despite the lack of an official professional or industry association, artists have taken initiative to create an environment that is conducive to growth and development. One example is the establishment of **this town is small**, the sole Artist-Run Centre (ARC) on the Island, in 2010. ARCs play

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[19] Prince Edward Island Crafts Council (PEICC) website, "About Us," available at http://peicraftscouncil.com/about-us/

a critical role in the visual arts ecosystem across Canada, and this town in small provides opportunities for PEI visual artists to experiment and develop their craft, and facilitates exhibition opportunities through cross-sectoral partnerships (e.g., with the Farmer's Market).

This town is small has also played a key role over the last four years, in partnership with the City of Charlottetown and the Confederation Centre for the Arts, in organizing Art in the Open, a community-based art festival that has increased the profile of visual artists on the Island as well as promoted public engagement with contemporary art. Overall, the visual arts discipline has experienced some notable achievements in the past few years.

Innovation PEI supports the crafts industry through the Craft Development Program, providing support to craftspeople and craft groups, organizations or associations with financial support toward:

- New product development,
- Training, and
- Marketing.
- The program covers 75% of eligible expenses, up to a maximum of $1,000 per project.

## 4.3 Overarching trends

The following section situates PEI's Visual Arts and Crafts disciplines within the broader context and discusses national and international trends and market implications.

According to the Canadian Culture Satellite Account, in 2010, the visual and applied arts domain, (which includes original visual art, art reproductions, photography and crafts):

- Was second-highest[20] in terms of gross domestic product among the culture industries ($13.4 billion); and,
- Employed 192,000 Canadians, which is more than any other domain in the culture industries and accounting for 27% of total jobs in the sector.

The number of visual artists, artisans and craftspeople in Canada is estimated at 29,000.[21]

**Visual Arts**

While artists in general have a higher rate of self-employment than the overall labour force, visual artists are **more likely to be self-employed** than artists in any other domain. Estimates of self-employment among visual artists range from 74% to 92%.[22]

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[20] The highest contributor to the GDP of the culture industries was audio-visual and interactive media, at $13.8 billion, Statistics Canada (September 2014), *Canadian Culture Satellite Account, 2010.*

[21] [21] Hill Strategies (2014), "A Statistical Profile of Artists and Cultural Workers in Canada," *Statistical Insights on the Arts*, Vol. 12, No. 2.

[22] Compared to 11% to 15% for the overall labour force and 51% to 70% for all artists. Figures drawn from Hill Strategies Research based on the 2011 National Household Survey (NHS) and Labour Force Survey (LFS). Note that the LFS estimates are higher than the NHS estimates across all domains.

Nonetheless, self-employed artists remain part of the discipline's complex value 'web,' which involves educators, funders, exhibitors, collectors and audiences. The ability of visual artists to make a living through their practice depends on the following streams of income:

1) Artists fees received as compensation for the exhibition of their work or use of their intellectual property (i.e., reproductions);
2) Sale of their work to collectors or galleries; and,
3) Public support in the form of grants; and,

The first stream is inherently linked to another discipline discussed in this report: Museums & Heritage (see Section 3). While professional associations CARFAC and RAAV have spent decades negotiating baselines in terms of **work conditions and compensation for visual artists**, gaining ground in terms of compliance with those standards has posed some challenges. Despite the existence of guidelines, minimum fees are not paid consistently across Canada. In May 2014, the Supreme Court decided in favour of CARFAC and RAAV in the appeal of a decision made on their authority to negotiate copyright fees, against one of the largest museums in the country, the National Gallery of Canada.

Audience engagement with the visual arts can also be cultivated outside the gallery space, and has become simultaneously more localized and more globalized. Platforms such as Google Art Project give audiences **online access** to millions of masterpieces, while **art festivals** such as Nuit Blanche engage entire communities in appreciation of contemporary artistic practices.

Whereas exhibitions and art festivals serve as a link between the artist and the audience, commercial galleries connect artists to collectors. Gallerists and agents continue to play a key role in bringing contemporary art to the market, yet they are no longer the sole gatekeepers in the discipline. **Online sales** account for a small fraction of the art market today, however it is a segment that is expected to grow quickly in the coming years. With the entrance of online retail channels such as Artsy and Artnet, and even Amazon, into the market, visual artists are granted increasing access to the US$66 billion global art market. [23]

### Crafts

Similarly, and perhaps more markedly, online marketplaces such as eBay and Etsy have impacted the crafts discipline. Etsy, which focuses on handmade crafts, currently serves over one million sellers and facilitated over US$1.4 billion in sales in 2013 (up 63% from the previous year).[24] As a result of these advancements, craftspeople now have the opportunity to access a global market without need for a physical storefront. However, discovery remains an issue and promotion a priority.

In Canada, professional crafts associations have played a key role in promoting the crafts discipline at the provincial/territorial and national levels. This year, craftspeople and crafts-lovers around the country will celebrate **Craft Year 2015**, a nation-wide celebration of Canadian craft. Initiated by the

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[23] The European Fine Art Foundation (TEFAF) (2014), "Global art market nears pre-recession book level as American sales soar," available at: http://www.tefaf.com/DesktopDefault.aspx?tabid=15&tabindex=14&pressrelease=16079&presslanguage=1
[24] Etsy (2014), *Etsy Values & Impact Annual Report 2013*, available at http://blog.etsy.com/news/files/2014/02/Etsy-Progress-Report_2013.pdf

Canadian Crafts Federation, which represents the craft councils in each province/territory, the coordinated exhibitions, workshops, lectures and other events aim to increase exposure of the discipline to local, national and international markets.

## 4.4 Market dynamics and labour market implications

In this section, the implications of the above-mentioned trends on PEI's Visual Arts and Crafts disciplines are discussed, along with their impact on the workforce.

### 4.4.1 The artist as entrepreneur

PEI's visual artists and craftspeople operate in an increasingly competitive landscape, and as with professionals across the culture sector, are required to wear multiple 'hats'. With the pervasiveness of online sales channels presenting opportunities for PEI arts and crafts to reach global audiences, the skills and time required to maintain an online presence and/or execute an effective digital promotion and sales strategy has become an important component of the job description. In effect, artists and craftspeople are required to maintain an online 'storefront'; many consider this important business aspect to be equivalent to an additional part-time job.

In addition to taking a more active role in delivering their artistic creations to audiences and consumers, visual artists and craftspeople are continually required to 'sell' themselves – more accurately, their artistic practice – through grant applications, artist statements and portfolios. In addition, maintaining an online presence and creating an 'online storefront' require an increasingly high level of online business skills. Artists and craftspeople as entrepreneurs may find the expectation to create and maintain a professional website and social media channels to 'sell' themselves and their work frustrating or intimidating.

In the conventional visual arts value chain, curators, critics and commercial agents (e.g., dealers, galleries, and artist managers) play a critical 'connector' role between the producer and the market/audience. However, in some cases, artists adopt this connector role – which inherently involves a distinct set of skills.

The role of the artists as entrepreneur – inclusive of creation, marketing and promotion, distribution and audience engagement – is particularly important within the context of PEI, given the limited commercial and exhibition opportunities available in the discipline. In fact, visual arts and crafts were found to have the highest prevalence of self-employment among all disciplines in the sector, estimated in 2008 to be around 90%.[25] Thus, business and marketing skills, including the digital skills required to compete in today's global marketplace, are crucial to sustaining a career.

### 4.4.2 Distinction between hobby and profession

One of the key themes that emerged from consultations was the blurred line between the professional visual artists or craftsperson, and those who pursue the creation of visual arts and crafts as a hobby.

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[25] PEI Cultural Human Resources Council, *Prince Edward Island's Cultural Labour Force: A Supply and Demand Study* (2008).

While specific training or education is not requisite for pursuing or attaining success as a professional artist or craftsperson, the lack of structure and professional development opportunities serves as a barrier to advancement.

Residencies and exhibition opportunities are important parts of the development of a professional artist, who as one stakeholder defined it, are “actively seeking an audience for their work.” On the other hand, adherence by exhibitors to compensation standards, such as those prescribed by CARFAC, contribute to the discipline’s progression toward professionalism. Similarly, a distinction between ‘production’ and ‘creation’ was noted as essential in the crafts discipline, whereby the ‘quality’ or creative elements of a craft work is granted more importance.

Finally, consultations revealed that CARFAC artist fees are not the norm across PEI galleries, making it difficult for emerging artists to make a living, gain exhibition experience and advance their careers.

### 4.4.3 Affordability of live/work spaces

Many aspiring contemporary artists receive their artistic training off-Island and while some remain in close proximity to educational institutions and regions (e.g., Halifax, Montreal, Toronto, etc.) with surrounding infrastructure to support their careers, there are elements that attract others to PEI.

Artists who do come back cite the quality of life and affordability as the main reasons for their decision. For visual artists and craftspeople, the affordability of living (and work) spaces serves as a practical attraction to returning to PEI. As one stakeholder noted, “there’s no room for looms in a one-bedroom apartment,” referencing PEI’s relatively inexpensive property as an advantage over other regions with perhaps more market opportunities.

At the same time, the relatively low cost-of-living also reduces the challenges associated with the sporadic, project-based nature of visual arts and crafts.

### 4.4.4 Building/accessing a sustainable ‘market’ for visual arts

Given the small market/audience on the Island, opportunities to market, exhibit and sell products remain limited. The local market is not in itself large enough to sustain the industry. Audience demand for and engagement in contemporary art practices is limited, while the crafts discipline is highly dependent on, and linked to, PEI tourism.

For visual artists, the issue is one of education and awareness, as well as recognition of artistic content *as* product. In addition to creator and entrepreneur, it seems that educator (e.g., through increased on-site and virtual interaction with audiences) is a potential role for the visual artist – an element required to stimulate demand for their products.

## 4.5 Looking ahead

In recent years, both disciplines have experienced a surge in young, emerging artists returning to the Island. This trend is expected to continue in the coming years, outpacing the rate of retirement in the disciplines. As such, it is anticipated that the visual arts and crafts labour force will moderately grow over the next few years.

Nordicity

However, given the challenges faced by the current labour force, there are opportunities to enhance professional support systems and develop the skills required for visual artists and craftspeople to maintain and advance their careers.

Moving forward, the visual art and crafts disciplines on PEI will need to mitigate the following labour market challenges:

- Lack of a centralized and cohesive professional/industry network in visual arts;
- Lack of distinction between professional and 'hobby' arts and crafts;
- Lack of established market structures (e.g., no 'connector' role) in the visual arts;
- Limited access to skills development and career advancement opportunities;
- Lack of economic opportunities for artists to sustain a professional practice on PEI;
- Artistic 'scene' on PEI not developed enough to attract artists; and,
- Lack of alignment of funding schemes with needs of the discipline.

These challenges are further explored in the following section, along with the opportunities identified in the disciplines.

## 4.6 Challenges and opportunities

| Challenges facing PEI's Visual Arts and Crafts disciplines |
|---|
| **GAPS IN THE VALUE CHAIN** |
| **Lack of a centralized and cohesive professional/industry network in visual arts** |
| *Impacts: New entrants, talent attraction/retention, professional development, knowledge transfer/succession planning* |
| ▪ Currently, there is no formal network of visual artists on the Island, limiting knowledge-sharing opportunities between aspiring, emerging and established artists.<br>▪ Emerging artists do not have an opportunity to learn from artists with mature careers, while more mature artists have no means of establishing a legacy on PEI, or sharing their knowledge with the next generation. |
| **Lack of distinction between professional and 'hobby' arts and crafts** |
| *Impacts: New entrants, professional development* |
| ▪ Despite the existing support network in crafts, there is a perception in both disciplines that lack of professionalization and recognition of visual artists and craftspeople is a significant barrier to building and sustaining a career.<br>▪ Current infrastructure in the disciplines (e.g., support mechanisms, training and professional development, exhibition and retail opportunities) not adequate to accommodate growth in the labour force. |

| Lack of established market structures (e.g., no 'connector' role) in the visual arts |
|---|
| *Impacts: New entrants, talent attraction/retention, professional development* |

- Consultations with the sector revealed a scarcity in curators and commercial agents/dealers on the Island, necessitating self-representation, self-promotion and an entrepreneurial approach among artists in terms of exhibition and retail opportunities.
- There is a lack of training opportunities for artists and craftspeople to be equipped with the skills required to adopt 'connector' roles, or for new entrants to pursue careers in those areas.
- Absence of established market structures (e.g., commercial gallery/dealer/agent a nonexistent role in the current ecosystem), lack of knowledge of alternative income streams, and perception of limited infrastructure serve as a disincentives for youth to pursue visual arts or crafts as a career.

**SKILLS GAPS**

**Limited access to skills development and career advancement opportunities**

*Impacts: New entrants, professional development*

- Residencies exist, but they are few in number and limited in capacity. A mentored residency is available through this town is small, and the PEI Arts Council is involved in the Atlantic Public Arts Funders (APAF) Creative Residency Program, the first initiative of the regional collaborative body. Further development of residencies, mentorships and other professional development initiatives would be highly beneficial to practicing artists.
- Formal or informal learning opportunities for digital, business administration or marketing skills are not integrated into educational and training pathways.
- In some cases, reluctance to adopt or develop appropriate skills limits discoverability or ability to leverage digital marketing and sales channels to access audiences/consumers.

**ECONOMIC BARRIERS**

**Lack of economic opportunities for artists to sustain a professional practice on PEI**

*Impacts: New entrants, talent attraction/retention, professional development*

- There is a lack of market/audience demand for visual arts, particularly more conceptual/experiential/performance-based works, with few opportunities for public to engage in and be exposed to contemporary art practices and discourses, although events such as Art in the Open continue to enable progress in this area.
- PEI artists and craftspeople have limited exposure and access to external markets.
- Lack of uniform compensation standards presents economic challenges for artists, as artist fees are not commonplace when works are publicly exhibited.
- In addition to managing the creative and business aspects of their artistic practice, limited economic opportunities in the disciplines requires many visual artists and craftspeople to depend on supplementary sources of income from additional part-time employment. While hybrid careers are the norm among visual artists and craftspeople, it can be difficult to manage a job in another sector with the irregular, project-based nature of the visual arts. Artists face difficulties attaining supplementary employment, managing multiple jobs, reconciling the irregular, project-based nature of the visual arts with other employment commitments.
- Lack of exhibition and sales platforms for artists and craftspeople.

**Artistic 'scene' on PEI not developed enough to attract artists**

*Impacts: New entrants, talent attraction/retention*

- There are few exhibitions or arts-related events to draw artists from other jurisdiction, or create a 'buzz' around the PEI's artistic milieu.
- Many aspiring contemporary artists receive their artistic training off-Island and are likely to remain in close proximity to educational institutions and regions (e.g., Halifax, Montreal, Toronto, etc.) with surrounding infrastructure to support their careers.

**Lack of alignment of funding schemes with needs of the discipline**

*Impacts: New entrants, talent attraction/retention, professional development*

- Misalignment between public support mechanisms (i.e., grants) and 'business models' in the visual arts prevents artists from accessing available funding, and amplifies the economic challenges associated with entering this field.
- Perception that the Province primarily approaches culture as a tourism draw, not as an export opportunity. As a result, little support exists for creation and exhibition.
- While public grants are available, the application process can be time consuming and requires skillful articulation of the artist's practice, portfolio development, and budgeting.

## Opportunities in PEI's Visual Arts & Crafts disciplines

**Increasing professionalization of the disciplines**

- Although there may not be the critical mass in the visual arts discipline to warrant an official industry association, informal networking and connections should be encouraged and supported.
- Artists can also become more involved with arts associations at the regional level, or create informal local networks, to access opportunities to learn from other artists and advocate/strategize with a united voice.
- More formalized and peer-led industry recognition (e.g., juried arts and crafts competitions) can add some measure of professional credibility for working artists, distinguishing them from more informal arts and crafts hobbyists.
- Communication and promotion of the value of visual arts and crafts through consistent payment of artist fees for participation in public galleries and exhibitions.

**Developing entrepreneurship and business administration skills**

- Entrepreneurship skills building to encourage 'thinking outside the box' and the development of artist-driven commercial and exhibition opportunities would mitigate some economic challenges.
- Recognition among artists that market development and business management are part of their profession, and not perceive this as a detraction from their artistic practice.

**Increasing professional development and career advancement opportunities**

- Mentorship and knowledge-sharing opportunities, increased residency opportunities across PEI, and the establishment of artist-in-residence programs at public institutions are all ways of addressing shortage of professional development opportunities.

- Reciprocal artistic exchanges with other jurisdictions and increased access to information on off-Island residencies (e.g., APAF Creative Residency) can allow increased exposure to broader visual arts market. Mentorship of emerging artists by established artists more familiar with funding processes may maximize impact of public support, as well as support in the development of grant application elements (e.g., articulating practice, building a portfolio, developing budgets, etc.).
- Guidance on variety of potential income streams, e.g., hybrid careers in multiple cultural disciplines, supplementary employment in other sectors, emphasis of skills that can be transferred to other sectors of the economy, advice on scheduling, time management and managing multiple projects and priorities.
- Skills development and training opportunities in other (non-producing) aspects of the visual arts value chain through cross-functional mentorships and placements with commercial galleries (on- and off-Island) and curators at public cultural institutions.
- Increased dialogue between funders and artists/craftspeople to understand needs of discipline and funding opportunities.

**Creating new economic opportunities through broadening the involvement of visual artists and craftspeople along the value chain and into other cultural disciplines**

- Visual arts and crafts professionals have the skills to contribute to other cultural disciplines, including performing arts/theatre (e.g., set and costume design), festivals (e.g., art direction), and marketing roles at multi-use venues (e.g., content creation, multi-platform audience engagement).
- Building arts and crafts into other proven cultural exhibition venues and events (e.g., Showcase PEI, inclusion of commercial opportunities at arts festivals).
- Engagement of artists and craftspeople (current and aspiring) in other aspects of the visual arts and crafts value chain, such as curatorship, retail and artist management can fill the gaps in the value chain.
- Encouragement of artist-led initiatives, including curation and organization of exhibitions, can lead to increased volume and diversity of exhibition opportunities and audience exposure.
- Development of artists as arts educators, and increased public profile through inclusion of arts and crafts in community events can promote public engagement with visual arts and crafts.
- Coordination with tourism activities (e.g., arrival of cruise ships) can ensure exposure to and readiness for a surge in demand.

**Developing PEI as an artist-friendly destination**

- Develop a system of reward or recognition of businesses that accommodate employees that are also practicing artists.
- Development of PEI as a hub of artistic activity in Eastern Canada, for example through the establishment of national residencies or an arts institute (or satellite).

**Encouraging investment in and support of visual arts by other sectors of the economy**

- Engagement and education of businesses that offer supplementary employment to artists can encourage ongoing support of professionals in the disciplines.
- A public art program (e.g., 1% allocation of development budgets towards the commissioning of public art, as is done in many other jurisdictions) can promote increased recognition of visual artists in the community.

## 4.7 Certification opportunities

Given the challenges posed by the lack of professionalization in the visual arts and crafts discipline and the increasing importance of business skills, certification or standardization can be beneficial to artists and craftspeople. Potential initiatives include:

- Agreement among public galleries to compensate artists for the display of their work – standardization in this area was identified as key to professionalizing the visual arts discipline;
- Recognition of professional artists and craftspeople through juried competitions, awards or memberships offered by professional councils (e.g., PEICC, PEI Arts Council) to serve as a form of certification or designation;
- Encouragement of local businesses to support artists through flexible employment through an 'artist-friendly' designation, which would not only benefit existing artists but also establish PEI as a destination that is welcoming to artists.
- Certified training programs for management of commercial retail channels for visual arts and crafts, perhaps through partnerships with existing business training programs (e.g., UPEI School of Business).

# 5. Theatre, Dance and Multi-use Venues & Facilities

## 5.1 Overview of the disciplines

The **theatre** and **dance** disciplines includes individuals and organizations involved in the development and production of live performances as well as promoters and presenters of performing arts. This section also includes **multi-use venues and facilities**, which generally host performing arts and/or other cultural activities.

In the PEI context, the disciplines consist of larger performing arts venues such as:

- Confederation Centre of the Arts,
- The Guild,
- Victoria Playhouse,
- Watermark Theatre,
- St. Peter's Courthouse Theatre,
- King's Playhouse, and
- Harbourfront Theatre.

Many productions build on the Island's cultural identity to attract audiences, with *Anne of Green Gables: The Musical* holding the record for the longest-running musical in the world.

In addition to the main theatres, these disciplines include smaller community theatres and performing arts groups and schools. At the post-secondary level, the **Holland College School of Performing Arts (SoPA)**, a partnership between the College and the Confederation Centre of the Arts, offers two-year diploma programs in Dance Performance and Theatre Performance, as well as a one-year certificate program in Performing Arts Foundation.

According to the Canada Council for the Arts, there are **32 dance-related organizations** on the Island, including presenters/promoters, associations/networks, leisure clubs/groups, instruction/training facilities, funder/policy maker/sponsor, and events/festivals/competitions. The genres of dance covered by these organizations range from Scottish County, Irish and Latin dancing, to ballet, contemporary, hip hop and aboriginal powwow.

Smaller dance studios provide children's and limited adult instruction/opportunity for performance in other municipalities, such as Summerside. However, consultations revealed that PEI's performing arts disciplines, along with many professional support resources, are primarily concentrated in Charlottetown. Even in the capital city, some informants observed that the large presenting organizations seem to be somewhat isolated from the broader performing arts community.

## 5.2 Role of support organizations

While there is no PEI-specific support organization serving the broad performing arts discipline on the Island, many organizations are members of the regional **Atlantic Presenters Association (APA)**. The

APA holds an annual conference, *Contact East*, which showcases the region's performing artists and presenting organizations and provides professional development and networking opportunities. The APA also supports contemporary dance touring across the Atlantic and beyond through the Atlantic Moves program. In 2012, the APA partnered with CulturePEI and Music PEI to host a workshop on best practices for the Island's festival organizers.

There is currently no professional dance organization on PEI.

## 5.3 Overarching trends

The following section situates PEI's Theatre and Dance disciplines within the broader context and discusses national and international trends and market implications.

According to the Canadian Culture Satellite Account, in 2010, the performing arts discipline employed 53,000 Canadians and contributed nearly $1.9 billion to the national GDP. In 2008, Canadians spent $1.4 billion on live performing arts, accounting for 5% of overall consumer spending on cultural goods.[26]

In a 2013 study by CAPACOA, attendance at live performance events among Canadians was reported to be as high as 75% in 2010, with 86% reporting that they have attended an event at some point in the past. In fact, 44% of Canadians over the age of 14 responded that they attended a theatrical performance in the year prior to the survey. The CAPACOA study also shed light on some other aspects of performing arts presentation:

- **Prevalence of partnerships in the discipline:** The study revealed that a large majority of performing arts presenters across Canada engage in partnerships with arts and community-based organizations, as well as educational institutions and government toward both audience development and community enrichment objectives.
- **The myth of the aging audience:** There is a common conception that the aging Canadian population poses a significant challenge to performing arts organizations, given the appeal of theatre and dance to older audiences and donors. However, the study found a higher rate of attendance among younger Canadians;
- **Alternative/complementary media-based consumption:** Of those who attended live performances, 94% also engaged in media-based consumption of performing arts, while the availability of performing arts through various media provided an opportunity for non-attendees to participate in performing arts;
- **The importance of in-person attendance:** Those who attend performing arts events in person generally ascribe a higher degree of importance to the activity than do those who engage with the performing arts through media.[27]

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[26] Hill Strategies (2011), *Patterns in Performing Arts Spending in Canada in 2008*.

[27] The Canadian Arts Presenting Association (CAPACOA) (2013), *Value of Presenting: A Study of Performing Arts Presentation in Canada*.

While it is clear that the performing arts compete with an ever-expanding universe of media content available to the consumer, the ultimate impact of technology on the performing arts remains to be seen. However, artists, producer and presenters alike have begun experimenting with the incorporation of technology into the ways in which they deliver experiences to their audiences.

One way to do so is to exploit new digital platforms that can provide a quality experience in a venue where performances can be piped in remotely. For example, New York's Metropolitan Opera pioneered the satellite attendance model, offering audiences a chance to see performances live in movie theatres, as well as on-demand through a subscription streaming service. Presenters around the world have followed suit, extending their programming to both small and big screens.

Creators are now trying to introduce technology into the artistic work in ways that are innovative and enhance the way in which these works are appreciated. While such practices are becoming more successful in artistic and commercial terms, they are generally still more expensive to mount. For example, the very successful combination film and stage performance of *Helen Lawrence*, produced by Canadian Stage in Toronto in co-production with two companies in Europe, required a cast and crew of about 20. It is/was an expensive proposition, but represents the early stages of a more multi-media approach in live performances.

## 5.4 Market dynamics and labour market implications

In this section, the implications of the above-mentioned trends on PEI's Theatre and Dance disciplines are discussed, along with their impact on the workforce.

### 5.4.1 Global competition for audiences and talent

The 'anytime, anywhere' availability of online content has created a highly competitive and globalized landscape for the performing arts, with more creators and presenters vying for eyeballs and occupied seats than ever before. This trend, now an acknowledged reality, requires a new audience-engagement approach on the part of performing arts organizations. Consultations revealed that, in the case of performing arts organizations with solo or limited management structures, the following elements exist:

- Many leaders (and their staff) **spend more time on marketing and advertising** than any other function;
- As with other disciplines, it seems that in today's competitive landscape, **social media management can be thought of as equivalent to a full-time job**; and,
- In a sector that already requires professionals to wear multiple hats, it is often difficult to keep up the content flow and stay abreast of quickly shifting trends and platforms.

The globalized nature of competition in the disciplines extends beyond attracting audiences, also making it difficult to locate both jobs and talent:

- **Performers** on the Island compete in world-wide audition calls for local productions, often losing roles to non-Islanders. There is speculation that there is a perception that high-calibre talent is scarce on the Island. For example, principle casting for some of PEI's larger productions is done exclusively in Toronto.

- On the other hand, **employers** find it difficult to retain talent, with trained staff moving off-Island to pursue better economic opportunities, namely salaries with which PEI organizations are not able to compete.

Finally, as mentioned in the previous section, technological advances not only open up new channels of attracting audience to on-site performances, but can also facilitate the extension of the performance space to reach global online audiences. In order to appeal to new audiences, performing arts organizations feel compelled to explore avenues that are more palatable to a younger generation. This trend may be positive if venues can increase the variety and attraction of 'live performance' content, although obviously potentially displacing local productions. At the same time, for the creator, it provides new opportunities to take advantage of the same technologies to pursue new and innovative theatrical and dance works.

### 5.4.2 New skillsets

If performing arts organizations hope to remain competitive in this changing landscape, professionals in the discipline need to be equipped with the right skills to face contemporary challenges. As with any creative discipline, there is often a reluctance to emphasize non-creative functions out of fear that they will detract from the artistic practice.

However, there is consensus among many in the performing arts community that cross-training between creative, business and digital roles is the key to success. New channels of communication have become vital in these industries, namely, social media; e-newsletters and blogs; and, streaming. While the tactics of utilizing these tools are quite easy to learn, new skills are required to use them effectively, including:

- Alignment of digital strategies with organizational identity and vision;
- Keeping channels active and up to date with the latest trends, with a strategy versatile enough to move from one channel to the next; and,
- Finding a balance between monetization and audience-development, given the prevalence of streaming and the general expectation that online content is free.

These trends also impact artists and performers, as the Internet facilitates connection to larger cultural centres such as Toronto and Montreal, allowing emerging talent to remain on the Island while still connected to global networks.

### 5.4.3 Aging workforce

A 2008 study found that in the live performing arts, nearly two-thirds (64%)[28] of performing arts professionals on the Island have over 15 years of experience in the field. Consultations confirmed that the work force is aging, and many seasoned professionals are delaying retirement. To some, the post-retirement path is unclear. The result can be stagnancy in professional advancement in the discipline, which can be a disincentive to emerging professionals to remain on-Island. More attention to

[28] PEI Cultural Human Resources Council (2008), *Prince Edward Island's Cultural Labour Force: A Supply and Demand Study*.

transition and planning for different levels of engagement as mature careers evolve is a direction that appears to be inevitable in the performing arts.

At the same time, staffing is a growing problem at large performing arts venues, as well-trained new entrants are not readily available to replace workers that may be looking to retire. Despite the value delivered by highly-experienced professionals in leadership positions, new entrants can provide a much-needed fresh perspective, including social media savvy and understanding the preferences and tastes of a new generation of audiences. The matching of the needs and skills of these two career timeframes is a particular issue to be managed by the affected community organizations.

### 5.4.4 Seasonality and link to tourism

The link between the performing arts and the tourism sector results in a high level of seasonality, similar to the museums and heritage discipline. As a result, the size and demographics of the staff at these institutions and sites can significantly fluctuate between the summer and off-season periods. Given this dynamic, two groups of workers emerge at such venues, each of which have quite distinct characteristics.

The first group consists of a large number of **summer staff, hired on a temporary, part-time basis, often students with very little experience** in the culture sector, or any other sector. This group provides several benefits to organizations:

- **Temporary staff are affordable:** In order to fill the increased need for summer staff, museums and heritage institutions often take advantage of several labour-subsidy programs that allow them to hire on large numbers of students in the summer, including the Young Canada Works (national, 75% subsidy), Jobs for Youth (provincial, 100% subsidy) and Career Prep (provincial, 50% subsidy) programs.
- **Temporary positions can lead to future interest in the culture sector:** For the summer staff, a temporary placement at cultural site often serves as the first introduction to the culture sector. Many students tend to remain connected to – and some will even go on to pursue a professional career in – the culture sector. In effect, multi-use cultural venues often serve as a 'professional gateway' into the culture sector.
- **Younger staff offer a fresh perspective:** Consultations revealed that temporary staff (e.g., summer students, interns, etc.) provide an opportunity to invite fresh perspectives, new skills and creative approaches into the workplace.

In the off-season, the workforce generally consists of a small number of **permanent, full-time staff**. Given the small number of permanent staff at these organizations and the lack of access to part-time student labour in the off-season, organizations are not always able to meet tourism-related fluctuations. More flexible arrangements between employers and educational institutions could improve the roughness of tourism and seasonality.

## 5.5 Looking ahead

It is not expected that the workforce in the theatre, dance and multi-used facilities and venues disciplines will experience significant growth over the next two to four years.

Moving forward, these disciplines will need to mitigate the following labour market challenges:

- Inadequate succession planning and stalled career progression for emerging professionals;
- Lost opportunities by not proactively looking for cross-Island, national and international collaboration;
- Inadequate digital and social marketing skills to face new challenges;
- Lack of economic opportunities for performers and performing arts professionals that may drive emerging professionals off-Island; and
- Funding models not always conducive to innovation and artistic development.

These challenges are further explored in the following section, along with the opportunities identified in the disciplines.

## 5.6 Challenges and opportunities

| Challenges facing PEI's Theatre, Dance and Multi-use Venues & Facilities disciplines |
|---|
| **GAPS IN THE VALUE CHAIN** |
| **Inadequate succession planning and stalled career progression for emerging professionals**<br>*Impacts: Professional development, knowledge transfer/succession planning* |
| ▪ Emerging professionals have limited access to professional development and career advancement opportunities, and a perceived ceiling can be a disincentive to stay on the Island.<br>▪ Senior personnel who have many years of experience in the discipline are retiring later, and succession plans are not often in place, preventing mid-level professionals from smoothly stepping into leadership positions.<br>▪ Leaders may be reluctant to leave their positions, as post-retirement path toward some form of structured engagement and mentorship is not clear. |
| **Lost opportunities by not proactively looking for cross-Island, national and international collaboration**<br>*Impacts: New entrants, talent attraction/retention, professional development* |
| ▪ Pockets of activity in discipline across the Island are isolated from one another, with most training and professional development initiatives not accessible beyond Charlottetown.<br>▪ There are few opportunities for knowledge-sharing or networking between performing arts professionals across the Island, as well as between Islanders and other national or international organizations. |

| SKILLS GAPS |
|---|
| **Inadequate digital and social marketing skills to face new challenges**<br>*Impacts: New entrants, professional development* |

- Many professionals in the disciplines find it challenging to stay up to date with changing trends in digital and social media marketing, with no access to relevant sources or skills development opportunities.

| ECONOMIC BARRIERS |
|---|
| **Lack of economic opportunities for performers and performing arts professionals that may drive emerging professionals off-Island**<br>*Impacts: New entrants, talent attraction/retention* |

- Wages can be higher in other provinces and PEI organizations do not have the financial resources to compete for talent.
- Ease of mobility results in global competition for talent, making it difficult for small performing arts organizations to attract and retain talent.
- On the other hand, global calls for talent by larger organizations on PEI creates additional competition for local talent.
- In particular, talent attraction and retention challenges were identified in dance, with the lack of infrastructure preventing organizations from attracting classically-trained graduates as teachers or performers.

**Funding models not always conducive to innovation and development**

*Impacts: Professional development*

- There is a perception that on one hand, funding models do not emphasize business plans and content that is likely to have commercial success, and on the other hand, artists may be swayed to develop new concepts for their creative material with grant requirements in mind.

## Opportunities in PEI's Theatre and Dance disciplines

**Developing digital marketing skills**

- Social media is vital to reaching and engaging audiences in the performing arts, and professionals in the discipline would benefit from access to resources so that they can continually upgrade their skills and remain up to date with marketing tools and trends.

**Encouraging innovation in content development and presentation**

- The incorporation of technologies into the delivery of performing arts and other cultural events can increase the reach of these organizations. Artists and organizations should be encouraged and equipped with the skills required to experiment in this area.
- Creative professionals in other disciplines such as digital media can provide valuable skills to aid artists, presenters and venues experiment with technology.

**Increasing opportunities for professional development through mentorships**

- Mentorships can be highly beneficial in preparing emerging professionals for – and guiding them through – their careers.
- Leaders who are approaching retirement may find value in mentoring opportunities as a way to remain engaged with the community post-retirement.
- There is an opportunity for matching these two elements of the workforce through a more structured planning process for transition and post-retirement activity.

**Facilitating cross-Island networking and cross community connectivity**

- Knowledge sharing and collaboration can be facilitated through more cross-Island networking opportunities.
- One of the unique qualities of Island life is the lower living costs, which can highlighted in any recruitment of former (or new) Islanders.
- In addition, communities can participate in the talent attraction process through low cost (or free) building sites, for example, for incoming families of talent being recruited.
- Other measures such as finding seasonal employment opportunities can be important broader community contributions to retention and attraction.

## 5.7 Certification opportunities

One of the main forms of certification or standardization in the performing arts involve hiring unionized labour. However, while some facilities do hire IATSE members in technical positions, the high rates are too expensive for smaller Island productions. Indeed, practitioners reported that reputation is more important than credentials in this discipline, as many of the skills are self-taught. Also, at times some certifications (e.g., and Actor's Equity Card) can be seen as a hindrance as they create the impression that the certification holder will be more expensive than his/her competition.

# 6. Music & Sound Recording

## 6.1 Overview of the discipline

The **music and sound recording** discipline on PEI includes individuals and organizations involved in the composition, recording, production, publishing, distribution and rights management of music content across all genres. In addition to sound recording, the discipline also includes live music and music education.

Music is deeply entrenched in the Island's cultural identity, exposure to which begins at an early age. In terms of education, PEI has exemplary music programs at the junior high and high school levels, with core programs such as the band program producing many music-literate students. At the post-secondary level, the **Holland College School of Performing Arts (SoPA)**, a partnership between the College and the Confederation Centre of the Arts, offers a two-year Music Performance diploma program. Targeting students aspiring to develop careers in the music industry, the program follows the official curriculum of Berklee College of Music, a leading music training institution in Boston, Massachusetts, and combines the theoretical and artistic aspects of the discipline with the business skills required to manage a career in the industry.

Live music is also a key component of PEI culture, often overlapping other creative disciplines such as theatre and dance, as well as literature – particularly 'live', 'spoken word' or 'performance' literature. While highly seasonal, the Island's live music industry is a driver to tourism activity. There are some highly successful music festivals, e.g. the Cavendish Beach Music Festival, which marshal great audiences for both Island musicians and off-Island acts. There are also several PEI bands and acts that have found commercial success off-Island, and the revenue they generate outside the province is in effect, an export.

## 6.2 Role of support organizations

**Music PEI** is the key support organization for the music & sound recording discipline, with a mandate to promote growth and development of artists and the music industry on PEI. Music PEI has had a significant impact on the industry, from the perspective of stakeholders, through offering services and programs such as:

- Events such as Showcase PEI, the Music PEI Awards, and Music PEI Week;
- Support in the development of business and marketing plans;
- Workshops and coaching; and,
- Information on national funding programs and associations (e.g., SOCAN, FACTOR, Canada Council for the Arts).

Furthermore, Music PEI has commissioned the development of a Music Sector Profile and Economic Impact Assessment in an effort to further understand the industry.

Consultations revealed that Showcase PEI has created substantial opportunities for artists, bringing together delegates from across the country and the world in a small, intimate setting. Some musicians have seen immediate results, better than in the case of Canadian Music Week and East Coast Music Weel, where the much larger universe of contacts and competitors may dilute their efforts.

In fact, Showcase PEI has been a real boon to Island musicians, where top bookers, presenters and other sources of business for live music are recruited onto the Island through the efforts of Music PEI. The market comes to PEI, so to speak, so the top acts of that year (some 20 typically) get unparalleled attention from real customers.

Regionally, the discipline is supported by the **Atlantic Presenter's Association (APA)** and the **East Coast Music Association (ECMA)**. The APA supports live music as part of its broader performing arts mandate through services such as collective booking, conferences, mentoring, networking and professional development programs. The ECMA supports Eastern Canada's music industry through organizing the annual East Coast Music Week, as well as providing other showcasing and professional development opportunities.

## 6.3 Overarching trends

The following section situates PEI's music and sound recording discipline within a broader context by highlighting select national and international trends and market implications.

According to the Canadian Culture Satellite Account, in 2010, the sound recording domain[29] employed 12,000 Canadians and contributed $507 million to the national GDP.[30]

The industry overall has experienced significant shifts in recent years, including: [31]

- A steep **decline in physical sales** has been countered in part by **thriving digital sales**, which have more than doubled since 2009 – although from a small base;
- In 2013, the digital music market in Canada exceeded $216 million, surpassing physical sales for the first time;
- While downloads remain the largest component of digital sales, **revenue from digital subscriptions has been on the rise**, nearly doubling from 2012 to 2013 to reach 5% of the digital music market; and,
- Other revenue streams, such as performance rights and synchronization licenses have nearly doubled since 2007.

The observations listed above are reflective of changing habits among Canadian consumers, in response to which the industry continues to evolve and innovate. Some key, overlapping and related consumer trends include:

[29] The domain does not include live performance.
[30] The highest contributor to the GDP of the culture industries was audio-visual and interactive media, at $13.8 billion, Statistics Canada (September 2014), *Canadian Culture Satellite Account, 2010*..
[31] Music Canada Statistics, 2005 to 2013.

- **Access over ownership:** While traditional revenue streams, such as physical sales along with performance and mechanical royalties have been on the decline, new and emerging streams such as synchronization and digital rights, and live performance have been on the rise. In particular, the industry has been experimenting with monetization models in digital streaming, with many anticipating the segment to become a key component of the industry over the coming decade, with Canadian policy-makers responding to shifts in intellectual property management:
  - In 2013, global revenues from subscription services surpassed the US$1 billion mark, accounting for 27% of overall digital music revenues.[32] The IFPI estimates that over 28 million people have paid music subscription, growing by 2.5 times since 2010.
  - The Copyright Board of Canada reached a decision in 2014 on royalty rates for streaming rates, after six years of deliberation. While Tariff 8's royalty rates may be considered low, its enactment has opened up the Canadian market to major service providers such as Pandora and Spotify.
- **Shifting roles across the music industry value chain:** Changing consumption and distribution dynamics have also blurred the lines across the previously specialized roles in the music industry. Artists, managers, publishers and labels alike have been converging and diversifying their involvement in the value chain, and as a result, competition has intensified across all roles. Online platforms have also enabled fans and audiences to have unprecedented involvement in stages other than consumption (e.g., development, financing through crowdfunding, etc.)
- **Live music a growing revenue stream**: In 2012, SOCAN distributed $20.9 million in concert royalties, up 14% from the previous year.[33] While the top live performance destinations remained Montreal, Toronto and Vancouver, Atlantic Canada has kept pace, with Moncton, N.B., experiencing the highest rate of growth in live concerts per capita.[34]

## 6.4 Market dynamics on PEI and labour market implications

In this section, the implications of the above-mentioned trends on PEI's Music & Sound Recording discipline are examined, along with their impact on the workforce.

### 6.4.1 Leveraging the Island brand

Given the importance of music to PEI's culture, and the distinct character of Atlantic Canada, many musicians recognize the **Island identity** as an important asset and part of their 'brand'. Consultations revealed that Atlantic Canada has successfully developed a distinct and successful regional music

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[32] IFPI (2014), *Recording Industry in Numbers 2013*, available at http://ifpi.org/news/IFPI-publishes-Recording-Industry-in-Numbers-2014
[33] SOCAN (2013), "Canadian live music is outperforming," available at http://www.socan.ca/news/canadian-live-music-outperforming
[34] Ibid.

community, with industry stakeholders leveraging the collective identity to drive exports to shared markets.

The effectiveness of the Island brand is in part based on its authenticity. Some musicians indigenous to the Island lay claim to the influence of the Island community on their music, and in fact to a large part on their success in both on- and off-Island markets.

The Island is also home to a vibrant francophone music industry. Despite having a limited local market, it also benefits from distinct export markets with audiences in New Brunswick, Quebec, Ontario, and Western Canada, as well as internationally in countries such as France and Belgium. While the distinct cultural identity is an asset when it comes to exporting music, the small size of PEI's music industry and its relatively high levels of public support also provide advantages to aspiring music professionals. As one stakeholder noted, "it's nice to be a big fish in a little pond."

Consequently, musicians and music professionals on the Island operate within a small, yet supportive community of peers. In addition, as with other artistic disciplines, stakeholders highlighted the low cost and high quality of living as a key component of their decision to remain on the Island.

However, the PEI landscape brings with it some disadvantages as well. As one of the interviewees remarked, "the best and worst thing about being a musician on PEI is that everyone knows who you are." The small size and isolated nature of the Island's music industry poses challenges such as a limited local market for recorded music, a live music market highly dependent on tourism, and a shortage of recording studios and music publishers. These gaps in the ecosystem mean that some artists have left the Island to obtain such professional services – resulting in additional costs and lack of ready access.

### 6.4.2 The digital marketplace

Perhaps more than any other cultural discipline, technological advancement has shifted business models in the music industry. It is generally acknowledged by PEI's culture sector stakeholders that the music industry is further advanced in dealing with the digital shift than other disciplines, and can perhaps serve as a model of success. As noted above, the emergence of new revenue streams continue to both pose challenges and present opportunities for the Island's music industry. At the same time, the digital marketplace has opened up the possibility of a direct artist-to-audience interaction, which presents significant opportunities for artists operating in smaller and more isolated markets such as PEI.

In examining the digital marketplace with professionals in PEI's music industry, as in other creative disciplines, the two key sentiments were: 1) Digital presents new opportunities, and 2) Digital is a 'double-edged sword.' Technology has lowered barriers to accessing the market and at the same time, resulted in market saturation. Technological advancements have also shaped consumer perceptions of 'value', concepts of music consumption and access to free content.

There is a dividing line between using digital marketing and using technology to create songs. Digital recording and distribution have made the creation and dissemination of works more accessible than ever before. Finally, technology has simplified collaboration, whether locally, nationally or internationally. Artists today find themselves connected to a global network of professionals, with whom they can collaborate.

## 6.5 Looking ahead

It is not expected that PEI's music and sound recording workforce will experience significant growth over the next two to four years. However, given the robustness of the support provided by sector support bodies such as Music PEI, the Island's music industry is expected to experience growth in brand exposure and revenues.

Moving forward, the following challenges can be anticipated in PEI's music and sound recording discipline:

- Limited access to sound recording and music publishing resources;
- Limited access to business and marketing skills development opportunities;
- Need for increased experimentation with alternative business models;
- Limited potential for growth in small local market in the absence of exports; and,
- Seasonality of live music segment on PEI, and its dependence on tourism.

These challenges are further explored in the following section, along with the opportunities identified in the discipline.

## 6.6 Challenges and opportunities

| Challenges facing PEI's Music & Sound Recording discipline |
|---|
| GAPS IN THE VALUE CHAIN |
| **Limited access to sound recording and music publishing resources**<br>*Impacts: New entrants, talent attraction/retention, professional development* |
| ▪ While PEI benefits from a thriving live music scene, other elements of the music industry ecosystem are in short supply, requiring artists to go off-Island to access professional services of agents, managers, labels, and publishers.<br>▪ In cases where resources do exist, they do not often meet the requirement, professional standards, or have the contacts in the music business to properly service Island musicians. |
| SKILLS GAPS |
| **Limited access to business and marketing skills development opportunities**<br>*Impacts: New entrants, professional development* |
| ▪ With increased pressure on artists to promote their work and brand, digital marketing (e.g., social media) is recognized as especially important to the music industry; these skills are essential to the 'label readiness' of artists; in addition, artists require the skills to ensure their online presence reflects their brand and personalities as audiences demand more direct interaction with artists. |

**Need for increased experimentation with alternative business models**

*Impacts: New entrants, professional development*

- As emerging consumption channels such as streaming account for an increased proportion of the market, monetization remains a challenge for artists and businesses.

**ECONOMIC BARRIERS**

**Limited potential for growth in small local market in the absence of exports**

- It is very difficult for many local musicians to make a living strictly on the Island – although live performance opportunities can supplement their income from other jobs.

**Seasonality of live music segment and its dependence on tourism**

- Since the Island attracts a large number of tourists (over 1 million during the 2014 Sesquicentennial Year), the opportunities to perform are heightened at that time. However, the season is concentrated in the summer months and off-season opportunities are much more limited.

## Opportunities in PEI's Music & Sound Recording discipline

**Training 'vertically integrated' artists and music professionals**

- Given the limited on-Island access to key value chain components such as music publishers and promoters, artists can benefit from increased training in other aspects of the industry, e.g., marketing, promotion, and booking to facilitate a do-it-yourself approach.
- As with other creative disciplines, business skills and financial literacy are essential to growth and success. There is an expected need for ongoing support for both emerging and established artists in that aspect. Rights management is becoming increasingly complex due to the variety and fast evolving nature of digital platforms in Canada and internationally.
- The identified gaps in the value chain can also be addressed through the promotion of professional careers and provision of training resources across various roles in the music industry, for example artist management, sound production, etc.

**Increasing professional development opportunities, such as mentorship initiatives**

- Many of PEI's established musicians and music professional have experience with many of the challenges faced by new and emerging artists. Professional development, for example through mentorship initiatives, allows this knowledge to be passed on through the artists and professionals in the discipline.
- It is important for the initiatives to consider incentives for mentees to encourage participation.

**Increasing regional collaboration**

- Collaboration with regional partners can maximize the impact of resources, enable knowledge sharing and leverage shared expertise.
- Leveraging the shared markets for music from eastern Canada and joining forces to increase brand recognition can boost both exports and music tourism.

**Providing export development support**

- While programs such as Showcase PEI have played a significant role in boosting industry revenues, assistance with travel and touring costs can lower barriers to exports for artists.
- Export development can also be boosted by providing support in establishing a demonstrable following, leveraging that following and existing resources to enable entry into new markets, and identifying essential contacts in those markets (e.g., booking agents, publicists, etc.).
- Artists and music professionals would also benefit from the development of tour management and administrative skills, including obtaining artist visas and knowledge of customs regulations (e.g., sale of merchandise in various foreign markets).
- The development of follow-up skills can also allow artists and music professionals to maximize the benefits of export initiatives, for example through networking, nurturing business contacts, and continuing to develop new markets.

## 6.7 Certification opportunities

In general, certification has been deemed less relevant to the music industry. Rather, the value of musicians to buyers lies in the perceived quality of the output (e.g., demonstrable by live performance attendance, sales, fan base such as social media following, etc.). To that end, the track record of artists attracting audiences to live music situations (both at home and in international markets), and in sales and revenues (electronic or physical) are the hallmarks of the industry (e.g.,"...as featured in Billboard's Top Ten").

# 7. Film & Television

## 7.1 Overview of the discipline

The **film and television** segment includes individuals and organizations involved in the development and production of films (including features, shorts, documentaries and animation), television programs, and other filmed content (e.g., web series).

The presence of independent production professionals on PEI is small relative to the rest of Canada. Indeed, between 2008/09 and 2012/13, the *total* volume of film and television production on PEI was estimated at $9 million,[35] compared to approximately $27 billion across Canada over that same period.[36]

Despite the relatively small size of PEI's independent film and television production industry, there have been recent advancements in growing the sector, including the:

- **Island Media Arts Festival (IMAF):** Launched by the Island Media Arts Cooperative (IMAC) in 2010, IMAF is described on its website as "a little film festival of big dreams" and is now an annual celebration and showcase of locally- and regionally- produced films; and,
- **Screenwriting Bootcamp**: The annual training program attracts aspiring screenwriters from across the country, and has secured sponsorships from Telefilm Canada, Innovation PEI, Super Channel, the Independent Production Fund, Bell Media, Cellar Door Productions, and the City of Charlottetown.

## 7.2 Role of support organizations

**IMAC** is the key support organization for PEI's film & television community, with a mandate that covers the broader media sector. According to its website, IMAC offers "a pool of talent, resources, equipment, and space for productions," which includes:

- Equipment rental;
- In-kind grants, such as equipment and edit suite rentals;
- Skills workshops; and,
- Screening facilities for members.

As mentioned above, IMAC also organizes the annual media festival, IMAF. This year, it also launched VineFest, a showcase for content that has been created on the social media platform, Vine, along with a series of Vine workshops.

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[35] This figure includes Canadian television, Canadian theatrical feature film, foreign location and service and broadcaster in-house production volume.
[36] Canadian Media Production Association (2014*), Profile 2013: Economic Report on the Screen-based Media Production Industry in Canada.*

IMAC also collaborates with other creative disciplines, such as visual arts with the initiative to host and live stream a series of artist talks in collaboration with this town is small and Eastern Edge Gallery in Newfoundland and Labrador.

While IMAC does not provide cash grants, it is a partner organization for the Telefilm Micro-Budget program, allowing it to recommend one project each year for up to $120,000 in funding.

The film (and television) creators are also supported by **local organizations**, such as the Charlottetown Film Society, which hopes to increase screening opportunities for members through its plan to purchase the City Cinema.

## 7.3 Overarching trends

The following section situates PEI's Film and TV activity within the sector's broader context and then highlights national and international trends and market implications.

Global filmed entertainment revenues were estimated at $88.3 billion in 2013, and are expected to surpass US$110 billion by 2018.[37] Film and television production in Canada was estimated to total $5.82 billion and directly employ 50,200 full-time equivalent employees in 2013.[38] The majority of production in this discipline is concentrated in Ontario, British Columbia and Quebec, with the rest of Canada accounting for approximately 7% of overall production and less than 6% of employment.[39]

- **'Cord-cutting':** It is anticipated that the over-the-top/streaming segment (i.e., viewing TV and film content over the internet, such as with Netflix) will see the fastest rate of growth among all segments[40] as viewing habits shift away from traditional channels. While broadcast television is still the primary place that Canadians go for audio-visual content, it is in a slow decline, as most Canadians are watching fewer hours of over-the-air and cable television than in previous years.[41]
- **'Anytime, anywhere' access to content:** In contrast to broadcast television's slow decline, online video and Internet TV are becoming increasingly popular among Canadian consumers, notably:
  - Nearly one-third of the time spent by Canadian adults watching TV/video in 2013 was online, and 4% of Canadian adults only watch television programming online;[42]

[37] PWC, Informa Telecoms & Media (2014), *Global Entertainment and Media Outlook 2014-2018*.
[38] Canadian Media Production Association (2014*), Profile 2013: Economic Report on the Screen-based Media Production Industry in Canada*.
[39] Ibid.
[40] PWC, Informa Telecoms & Media (2014), *Global Entertainment and Media Outlook 2014-2018*.
[41] Communications Monitoring Report, CRTC, 2009-2014.
[42] Interactive Advertising Bureau Canada (2013), *Canadian Media Usage Study*.

- Canadians are increasingly accessing content on multiple devices at the same time, such as using a smartphone while watching television (31%),[43] accessing the Internet on a mobile phone while watching a movie (29%)[44] and, accessing a tablet while watching television (36%); and,
- Nearly one in five Canadian Internet users over the age of 18 have four-screen access to online video content (i.e., computer, tablet, smartphone and Internet-connected television).[45]

- **Content wars and the challenge of discoverability:** The rise in online consumption means that barriers to distribution are at an all-time low. Platforms such as YouTube allow content creators to reach global audiences at the click of a button, but this development has also created crowded marketplace. Competition to cut through the 'noise' has somewhat polarized content creation:
  - Established production companies and international players, often through international partnerships, are investing in **high-budget films and television programs,** while grappling to keep audiences engaged over multiple platforms.
  - On the other end of the spectrum, an increasing number of entrepreneurial producers are experimenting with **web-based** approaches, directly interacting with global audiences through online platforms, and leveraging those connections in marketing and crowdfunding campaigns.
- **Niche content and its monetization:** To attract audiences in the context of the current marketplace for audiovisual content, creators target highly-interested, niche audiences. These communities of interest are typically more willing to pay for content (or donate to creators) than more mainstream audiences. While there have been some high-profile successes in this environment (such as Epic Meal Time or Space Janitors), the majority of web-based video properties do not make significant profits.
- On a related note, there does not appear to be any correlation between production value and the ability of a given property to be monetized.

## 7.4 Market dynamics and labour market implications

### 7.4.1 Entrepreneurship, innovation and collaboration

The emerging nature of the Island's independent film and television production segment has led to the emergence of what one stakeholder referred to as the "entreproducer." Despite the limited public financial support (i.e., production tax credits) and infrastructure, film and television producers are driven by their passion and have found ways to make it happen.

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[43] ComScore (2014), *Canada Digital Future in Focus: The 2013 Digital Year in Review & What It Means for the Year Ahead*.
[44] Google (2013), *Our Mobile Planet: Canada – Understanding the Mobile Consumer*.
[45] Media Technology Monitor (2014), *Spring 2014: Top 5 Sneak Peek A Brief Review of MTM's Latest Findings*.

Some producers have reached niche online audiences through web-based content production, although the segment remains difficult to monetize. Recent Island-based successes include **Wharf Rats** (Final Five) and **Just Passing Through** on CBC ComedyCoup, and the **PEI encyclopedia** on YouTube (with one episode attracting over 930,000 views).

One of the key characteristics of PEI's independent film and television production professionals is their propensity to collaborate. Several stakeholders credited IMAC's role as a 'meeting place' that not only supports the industry, but also facilitates collaborations among the Island's media-makers.

The Screenwriting Bootcamp is another example of how the cooperative has facilitated innovation and industry development. The Bootcamp has created a buzz across Atlantic Canada, attracting top talent and developing a reputation for PEI.

In many ways, PEI provides advantages to the 'entreproducer,' including inexpensive (sometimes free) access to equipment, location and local talent, as well as highly affordable living. On the other hand, adopting an entrepreneurial approach requires a broad set of skills in all aspects of development, production, marketing and dissemination – and professional development in these areas is not readily available to film and television professionals on the Island.

## 7.5 Looking ahead

The growth of PEI's independent film and television segment over the next two to four years will rely on the financial support provided to productions. Typically, such support takes the form of a labour-based refundable tax credit, which effectively reduces the cost of producing content on Island. Such support regimes are present (in some form) in most Canadian provinces and territories. PEI's (current) lack of this type of incentive places the province at a competitive disadvantage.

If no support is offered, it is likely that the industry on PEI will continue to mainly comprise of a younger generation of low-budget creators. This generation of producers tends to create content for niches audiences while struggling with the competition and monetization challenges described above.

Meanwhile, festivals like IMAF would likely continue to exist, promoting experimental and (mostly) low-budget production. **It is highly unlikely that significant employment and economic impact will be generated by the independent film and TV segment in the absence of public financial support measures.**

That said, should public support for independent film and television production be introduced, the current low-budget creators could have the opportunity to grow their businesses and production budgets. More specifically, while the production labour force based on PEI is not likely to ever support large scale, Hollywood productions, local producers would have the ability to compete for domestic Canadian television productions, especially in unscripted/reality television and comedy.

Regardless of support, it is not likely that (domestic) feature film production will be source of significant employment on PEI in the foreseeable future. This segment is relatively small across Canada, as the majority of production activity relates to TV production.

In this context, the film and television discipline on PEI will need to mitigate the following labour market challenges:

- Not enough talent available to support growth and development in film and TV production;
- Not enough capacity to attract large film and television productions;
- No formal training available on the Island; and,
- No government support.

These challenges are further explored in the following section, along with the opportunities identified in the discipline.

## 7.6 Challenges and opportunities

**Challenges facing PEI's Film & Television discipline**

**GAPS IN THE VALUE CHAIN**

**Not enough talent available to support growth and development in film and TV production**

*Impacts: New entrants, talent attraction/retention*

- Talent not readily or quickly available, posing challenges to aspiring producers as they cannot find local workers.
- While some talent is available on the creative side (e.g., actors), there are gaps on the technical side (e.g., camera operators, editors) – a challenge that is common across Atlantic Canada.
- Talent gaps significantly impact producers, who often have to wear multiple hats and assume several roles in a production, or go off-Island to fill gaps.

**Not enough capacity to attract large film and television productions**

*Impacts: New entrants, talent attraction/retention, limits out-of-province investment*

- Limited infrastructure and talent, and lack of incentives, dissuades productions from selecting PEI as a location.
- This limited scale, in turn, restricts what PEI-based producers can create (without having to import most of the crew)

**SKILLS GAPS**

**No formal training available on the Island**

*Impacts: New entrants, professional development*

- The lack of on-island training both limits the new entrants to the market and means that existing talent has to go off-island to receive training.
- As a consequence, training is done (primarily) informally and PEI-based entrepreneurs may not have access to the most up-to-date skills.

**ECONOMIC BARRIERS**

**No government support**

*Impacts: New entrants, talent attraction/retention, professional development*

- The previous support regime likely had a negative experience, with productions such as *Emily of New Moon* (an out of province production that allegedly got many incentives yet had limited local impact)
- As a result, there is no labour-based rebate program currently targeted at the film and TV discipline.
- The lack of such as regime places PEI at a competitive disadvantage with respect to competing Canadian provinces.

**Opportunities in PEI's Film & TV discipline**

**Market integration with Atlantic Canada**

- Forming more, closer partnerships with other film and TV industries in Atlantic Canada with the aim of providing services to production undertaken by those industries (sometimes called 'nearshoring').
- Providing production services to industries like Nova Scotia's. For instance, by extending PEI's video game labour rebate to video production companies (e.g., for visual effect services).

**Targeting support and focusing on niche segment**

- Supporting web series, and other types of production targeted at niche audiences, which do not rely on large degrees of government support.
- Investing in content that highlights experiences on PEI (e.g., food culture, music, etc.), which may attract audiences internationally and support tourism.
- Building on the interactive media activities with convergent digital media[46], which could become a specialty (on the East Coast).

**Increasing government support**

- Perhaps the most important 'opportunity' for independent production on PEI is the introduction of a labour-based rebate.
- By instantiating renewed support, the Province would attract more production and (more importantly) enable local producers to expand the scope and scale their projects (beyond niche audiences).

## 7.7 Certification opportunities

Certification in the independent film and television segment is typically reflected in membership in one of the unions and guilds including those that represent crew (e.g., IATSE), actors (ACTRA), directors and location managers (DGC) and/or writers (WGC).

Currently, none of these have a significant presence on PEI. Encouraging activity of these organizations on PEI may well have a positive impact on the credibility of PEI as a viable production jurisdiction and in improving the employability of labour on larger productions. However, given that

[46] "Convergent digital media" refers to the web-based content created in support of and/or as a complement to TV or film products. These convergent digital products are typically funded by organizations like the Canada Media Fund and the Bell Fund.

there are not many such large productions on PEI, it is not likely that certification via unions or guilds will be a significant benefit to the film and TV discipline on PEI (in its current form).

Addressing the lack of industry-standard training programs (i.e. those recognized to produce well-trained graduates) presents an opportunity for a local academic institution (e.g., Holland College) through partnering with an existing (and respected) organization, such as the Canadian Film Centre. Such a partnership could result in a satellite campus on PEI, leveraging an existing, respected brand, while improving the perception of PEI as a film and TV jurisdiction.

## 8. Interactive Media

### 8.1 Overview of the discipline

The **interactive media (IM)** discipline is particularly difficult to define. The Culture Satellite Account defines it as inclusive of "console games, on-line games, wireless games, and PC games as well as other related interactive digital edutainment products." The 2012 Canadian Interactive Industry Profile defined an interactive digital media company as one "that creates digital content and environments that provide users with a rich interactive experience--either with content itself or with other users--for the purposes of entertainment, information or education, or which provides services that directly enable these products/services."

For the purposes of this report, interactive media is understood to be primarily comprised of video game development (on a variety of platforms), though the discipline also includes other non-game varieties of digital media (such as so-called 'convergent digital media content' created to complement a TV series).

Regardless, video game development is the key active segment of the discipline on PEI. According to Gameplan, there are as many as six active video game development companies on the Island, including both independent firms and divisions of larger corporations operating elsewhere. That said, the discipline's labour force is principally housed in **Electronic Arts** (combining the formerly independent Bight and Other Ocean studios) and **Sculpin QA**.

While some of the talent for these companies is grown locally (see below), the majority is attracted from off-Island. Critically, the Province's 30% Video Game Labour Rebate incentivizes companies to operate on the Island, and has contributed to the development of the cluster by providing an economic incentive to IM companies.

In terms of education, PEI offers video game development training beginning in junior high and high school through the **Game Force** program, serving as a pathway for youth who are interested in pursuing a career in interactive media. At the postsecondary level, **UPEI** offers **a Specialization in Video Game Development** and **Holland College** offers a **diploma program in Video Game Art and Animation**.

**IT Garage** is a program providing young aspiring video game developers from across the country the chance to build a video game prototype while simultaneously benefitting from mentorship and training opportunities. The three-month program, in turn, grows the province's interactive media talent pool and increases the recognition of PEI as a hub of game development.

### 8.2 Role of support organizations

**Gameplan** is the key support initiative for the interactive media discipline. Developed by Innovation PEI, Gameplan aims to grow the video game industry on PEI through programs such as Game Force and Game Garage, in addition to partnerships with other public sector organizations and academic institutions.

PEI is also represented at a national level in at the Canadian Interactive Alliance – a national industry body – by representatives of Sculpin QA.

## 8.3 Overarching trends

The following section situates PEI's Interactive Media discipline within the broader context and discusses national and international trends and market implications.

Globally, the video games industry, which was valued at US$63.4 billion in 2012, is anticipated to grow at a rate of 6.5% year-over year to reach US $86.9 billion by 2017. The top three global markets for video games are the **US**, **Japan** and **China**, with combined revenues accounting for nearly half the global market.[47]

This growth is expected to be significantly driven by **online and mobile games**, which by 2017 will account for a combined 54% of the sector's revenues.[48] Despite the challenges of monetization given the prevalence of free-to-play models in this segment, there is a high potential for revenue as the target audience is expanded beyond the 'hard-core gamer' to include the 'casual gamer'.

It is estimated that the worldwide market for **educational interactive media products**, another thriving interactive media segment, reached US$35.6 billion in 2011, and is expected to continue growing at a significant pace over the coming years.

The Canadian video games development industry ranks 3rd globally, just behind the US and Japan,[49] and has been growing alongside global demand for video games. From 2011 to 2012, the industry saw a **5% growth in employment**, reaching 16,500 full-time equivalents (FTEs) employed directly, and contributing **$2.3 billion in GDP** to the Canadian economy.

As the growing online and mobile segments primarily involve digitally-distributed virtual products, firms are on equal footing when competing for global audiences regardless of where they are located. In fact, **talent remains the key differentiator** in this industry, with many firms competing internationally for skilled labour and leveraging quality and cost of living factors to attract and retain workers.

## 8.4 Market dynamics and labour market implications

In this section, the implications of the above-mentioned trends on PEI's Interactive Media discipline are discussed, along with their impact on the workforce.

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[47] Ibid.
[48] PwC. (2013). Global entertainment and media outlook: 2013-2017.
[49] ESAC. (2013). *Essential Facts about the Canadian Video Game Industry, 2013.*

### 8.4.1 Labour rebates attracting firms

As noted above, PEI is home to one of the world's most generous labour rebate programs, aimed at reducing the effective costs of labour in IM companies. Overall, this program has been successful in attracting (and retaining) IM talent to PEI. While this success is most noticeable with respect to the attraction of a small number of international firms (most notably Electronic Arts), it is also keenly used by local firms.

While the labour rebate has indeed been successful, relying on international IM firms to support the labour market can be somewhat precarious. International firms are particularly sensitive to changes in the economic landscape and their global perspective allows them to shift resources more easily than smaller geographically-limited firms. In other words, if the rebate program was to disappear it is likely that the international firms (and most of the employment they generate) would also disappear.

That said, the international firms (i.e. EA) account for the clear majority of IM employment on PEI. Additionally, they lend credibility to the IM discipline on PEI, which helps smaller firms when they go to market.

### 8.4.2 Stable but ever-changing jobs

IM products change very rapidly. Ever year new products, platforms and programming languages are created and the labour market must adapt. Indeed, as the industry changes, so too do the skills requirements needed to be an effective IM employee. As such, it is commonly a challenge to ensure that IM-related programs are well informed by industry needs.

To this end, some IM firms operating on PEI have established a relationship with UPEI and Holland College, helping to design and deliver their IM-related programs. In exchange, such firms are typically able to pick the 'cream of the crop' from each graduating class.

That said, IM jobs – while evolving – tend to be somewhat more 'stable' than those in other cultural disciplines. In terms of importance of income from cultural work, all (100%) respondents reported that their work in New Media was a major or sole part of their personal income – compared to 64% for the whole sector and as low as 41% for some disciplines (i.e., Writing and Publishing).[50] As such, IM-related work tends to be full-time in nature – perhaps more so than any other creative discipline.

### 8.4.3 Global talent competition; local stickiness

As with many disciplines (cultural or otherwise) that require specialized skill sets, there is a relative scarcity of key talent. Particularly, talent at the senior technical and senior creative level seem to be difficult to locate on PEI – but that is true in almost every jurisdiction. Indeed, PEI IM companies are competing for such senior talent with companies from around the world -- companies located in major centres like Vancouver, San Francisco or Shanghai. Further reinforcing this point, PEI-based IM companies report that they typically hire employees between 30 and 35 years of age.

[50] PEI Cultural Human Resources Council (2008), *Prince Edward Island's Cultural Labour Force: A Supply and Demand Study*.

Having attracted talent to PEI, they seem to stay. Interviewees reported that they have experienced a very low-level of employee 'churn' while operating on PEI. Often, the stability of IM combined with the low costs of living on PEI create an environment conducive to retaining talent.

## 8.5 Looking ahead

There is moderate growth expected in the interactive media workforce on PEI over the next two to four years.

Moving forward, the following developments can be anticipated:

- A new video games studio will open on PEI (in Charlottetown) and is anticipated to grow to approximately 50 people within the next 18 to 24 months.
- EA and Sculpin QA are likely to continue, but not significantly expand, operations on PEI.
- The global market for video games played on mobile platforms will continue to grow.

In this context, the IM discipline on PEI will need to mitigate the following labour market challenges:

- Long recruitment cycles;
- Shortage of talent in mid-level and senior positions;
- Limited local talent pool;
- Not a lot of talent available quickly on PEI; and,
- High salary expectations in Canada, leading companies to recruit from abroad.

These challenges are further explored in the following section, along with the opportunities identified in the discipline.

## 8.6 Challenges and opportunities

| Challenges facing PEI's Interactive Media discipline |
|---|
| **GAPS IN THE VALUE CHAIN** |
| **Long recruitment cycles** |
| ▪ Given that firms often have to look internationally for talent, immigration delays hinder filling key labour gaps (particularly at the intermediate and senior levels).<br>▪ New hires can take some time to be brought up to speed on company workflow practices. |
| **Shortage of talent in mid-level and senior positions** |
| ▪ It is and will continue to be difficult for IM companies on PEI to find intermediate and senior talent.<br>▪ Attractive labour incentives will continue to play an important role in mitigating this challenge. |

**Limited local talent pool**

- Given that (as with all industries) the local PEI talent pool is relatively small, the IM industry will face two challenges:
    - It will limit the types of IM product that can be made on PEI. Larger console games (e.g., *Grand Theft Auto* and similar titles) will require more workers than exist on PEI. As such, smaller titles (e.g., those played on mobile devices) will continue to be the norm.
    - When larger firms (such as Electronic Arts) exist they will likely attract most of the best talent on the island – a situation that limits the potential of the formation of new IM ventures.

**SKILLS GAPS**

**Not a lot of talent available quickly on PEI**

- The (inherently) small size of PEI's labour pool limits the ability of IM companies to grow (resulting in an increased dependence on imported talent).
- As a result, the larger firms (e.g., EA) can take up most of the top talent.

**ECONOMIC BARRIERS**

**High salary expectations in Canada, leading companies to recruit from abroad**

- Pay about 20% under market rates and bank on the attraction of PEI as a place.
- Finds it difficult to recruit from Canada – salary expectations are too high.

## Opportunities in PEI's Interactive Media discipline

**Supporting the development of mobile games**

- Be it through Bight Games, EA or Other Ocean, PEI IM industry has a strong history and international reputation for the development of mobile games (e.g., the *Simpsons: Tapped Out*).
- Such project require a limited financial investment and smaller teams, which befits the economic environment on PEI.
- New ventures in mobile development can build on this reputation and draw upon an experienced local workforce.

**Increasing collaboration with other creative disciplines**

- More convergence between creative disciplines has the potential to result in innovative, multi-media projects.
- Video game development is very specialized, but opportunities for film or music cross-over.
- Interactive media and visual arts collaboration opportunities exist.

**Simplifying local recruitment for companies**

- Recruitment can be expensive (e.g., due to recruiter fees).
- Increase link between companies and academic institutions.
- Tools/ actions for better recruitment.

## 8.7 Certification opportunities

Perhaps the most obvious opportunity for certification in IM relates to the subject matter taught at UPEI and Holland College. One might, for example, ensure that each graduate of IM-related programs meets a certification standard – and thus could be (more) easily integrated into a local IM company. Additionally, the presence of such a program would lend further credibility to the IM labour market on PEI – and, when combined with the presence of the labour rebate, could help to attract IM companies to PEI.

However, such certification programs have historically proven difficult to implement in a formal manner. Often by the time that the certification process has gathered the necessary approvals, the market has moved on to new skills/competencies. For this reason, should any certification process be contemplated regarding the quality of IM labour on PEI, it should likely be an extension of the existing relationship that IM companies have with UPEI and Holland College. For instance, graduates could be 'EA-Approved' rather than having achieved a given level of proficiency with a particular technology or software platform.

## 9. Writing & Publishing

### 9.1 Overview of the discipline

The **writing and publishing** discipline includes individuals and organizations involved in the creation, publishing and/or dissemination of written works.

In the context of PEI, the writing and publishing discipline builds on the Island's rich literary identity, from canonical works such as Lucy Maude Montgomery's *Anne of Green Gables* to contemporary bestsellers such as Patti Larsen's *Family Magic*, which recently won the international contest for World's Best Story.

### 9.2 Role of support organizations

The **Prince Edward Island Writers' Guild (PEIWG)** is the main support organization for writers and publishers. Its mandate is to promote growth and quality of the Island's literary arts. In order to support professional writers at all career stages, the PEIWG provides:

- Workshops, such as 2014's Self-Publishing Symposium and poetry workshop, both of which were presented in partnership with the UPEI Department of English;
- Partnership and advocacy initiatives, including the delivery of projects in association with the Confederations Centre Public Library and Art Gallery, the PEI Association for Newcomers to Canada, the Canadian League of Poets, the Writers' Federation of Nova Scotia, and as mentioned above, UPEI;
- Mentorship programs that connect emerging writers with published authors;
- Educational programs, such as the Writers in Schools Program; and finally,
- The Cox & Palmer Island Literary Awards, the 27$^{th}$ incarnation of which took place on November 1, 2014.

In addition, the PEIWG makes an effort to remain up-to-date with the needs of the Island's literary community. The results of its 2014 Members Survey will guide the development of future workshops.

**Innovation PEI** supports writing and publishing through the **Publishing Assistance Program**, which provides publishing companies with up to $15,000 per year toward publishing, distribution and marketing expenses.

### 9.3 Overarching trends

The following section situates PEI's writing and publishing activities within a broader context by highlighting select national and international trends and the market implications of those trends.

Across Canada, according to CSA, the written and published works domain[51] accounted for 146,000 jobs in 2010 and some $10 billion in GDP.

While it is quite familiar now to observe that digital technology disrupted the publishing industry (consider that the Kindle was first introduced nearly a decade ago in 2007), the industry itself continues to grapple with the impacts of those new digital technologies and changing reader behaviours. Of the myriad ways in which the publishing industry (including writers and readers) is evolving and innovating, we have highlighted five major, overlapping trends below.

- **The business model challenge for 'traditional' publishers:** The publishing industry, from the point of view of the 'traditional' publishers, has faced steep challenges amid the growth of e-books. Not only have buyers always expected to pay significantly less for digital, rather than physical, books but also Amazon's dominance over the e-book market has allowed it to exert enormous control over e-book selling prices. Amazon has driven e-book prices down over time, much to publishers' dismay. Publishers cost bases, however, have not shrunk with the introduction of e-books. In fact, most traditional publishers have had to operate in a market which, despite a decline in sales, continued to demand both print and digital book formats. As a result, publishers have experienced some increased costs in the current environment, as they attempt to invest in new systems and processes which reflect the digital world. Further, while publishers navigate these fundamental business model challenges, they do so in a context of little-to-no market growth. In 2013, the North American book market was almost flat[52] and in the UK, the invoiced value of publishers' book sales *fell* by 2% in the same year.
- **Publisher consolidation:** One response to business model challenges has been for publishers to consolidate. Indeed the past two to three years has seen major consolidations and closures in Canada and globally. In 2013, Bertelsmann's Random House, the world's largest trade publisher, merged with Pearson's Penguin to create Penguin Random House – a major change in the publishing landscape. As far as Canadian-owned publishers, two major acquisitions have depleted ranks since 2012. In 2012, the then Random House Canada acquired McClelland & Stewart, one of Canada's largest independents. While early in 2014, HarperCollins acquired Canadian Harlequin from TorStar, for almost half a billion dollars.
- **The decline in bricks and mortar sales channels:** Concentration has also occurred in the global bricks and mortar retail sector with small book stores going out of business, book sellers diversifying their revenue streams (e.g. sale of merchandise, events, and food), identifying the high and low end chains, and the rise of the mass market retail (that is to say book sales through supermarkets and the like). There is some discussion that independent

[51] Written and published works included books, periodicals, newspapers, other published works and collected information, as well as the multi sub-domain category, which includes activities such as printing, distribution, wholesale and retail.
[52] Publishers Weekly (26 June 2014), "Industry Sales Flat in 2013; Trade Dropped 2.3%," available at: http://bit.ly/1mh4QpP

bookstores are experience a resurgence in popularity but the overall retail climate for booksellers is still one of struggle.

- **The challenge of discoverability:** Revenue from e-books now accounts for a more than solid share of the total revenue of the largest global trade publishing houses. In the US in 2013, for example, e-books accounted for 21% of all trade sales. Amazon remains the dominant retailer for e-books, despite strong efforts from Kobo and other challengers. Although BookNet Canada recently reported that e-book sales had plateaued in 2013 at 15 percent of all book sales in Canada[53], PwC projects that revenues from e-books will rise to 38 percent of all books sales in North America by 2017[54]. The rise of e-books has forced publishers to evolve and improve their efforts to reach and engage audiences on multiple platforms, where they face intense competition for readers' time and attention. 'Discoverability' online has become a major area of focus, as publishers ramp up their focus on search engine optimization and placement on Amazon's homepage, various mobile channels and other devices such as Kindle.
- **The legitimization of self-publishing:** Simultaneously, in recent years, self-publishing appears to have moved from the fringes of the book marketplace to, in select cases, a viable source of income for writers and a growing threat to the role of publishers. Start-ups from Blurb, iAuthor, Wattpad and Amazon's Kindle Direct have enabled and encouraged writers to seek readers directly, with a higher degree of professionalism and polish than was previously possible. Online communities are providing writers with feedback and support to develop stories, particularly in genre-driven fiction such as science-fiction and romance. That being said, the majority of self-publishers authors must still work enormously hard to reach their readers and the quality of output spans a wide range.

Looking ahead, the boundaries between national markets seem to be lessening with the rise in digital reading. As digital production and promotion increases, traditional publishers are having to embrace leaner business models and an ethos of continuous learning. The industry has seen a shift toward entrepreneurship which may entice external industries to compete in the publishing industry, i.e. telecommunications, digital media, hardware tech (devices), and other creative industries.

## 9.4 Market dynamics and labour market implications

In this section, the implications of the above-mentioned trends on PEI's writing and publishing discipline are discussed, along with their impact on the workforce.

### 9.4.1 The digital marketplace

Just as with other cultural disciplines, technological advancement has shifted the value chain of writing and publishing; it has opened up the possibility of a direct author-to-reader connection. Self-publishing and self-promotion have had a particularly significant impact on PEI's small writing and

[53] For more information, see BookNet Canada (21 May 2013), "The Canadian Ebook Market Plateaus at 15%, Says New BookNet Canada Study."
[54] PWC, Informa Telecoms & Media (2014), *Global Entertainment and Media Outlook 2014-2018*.

publishing industry. While still a challenging arena which requires incredible dedication and savvy, both emerging and established writers recognize the new avenues to gaining financial security made available through self-publishing. They described the benefits of being able to write full-time, of having more control and choice in who they work with throughout the production process, and the flexibility to work from anywhere. Some writers on PEI say it is only because of a shift to a digital marketplace that they have been able to connect with audiences. They say that degree of access would have been impossible in a traditional publishing model.

While writers are now granted direct access to their readers via the Internet, they now face the challenge of balancing their creative and promotional activities. They also require the digital skills and marketing knowledge to break through a crowded digital marketplace. In effect, publishing and promotion have become as important as story-telling. With increased involvement along all aspects of the value chain, writers also need to adopt a more entrepreneurial approach to learn about and understand all aspects of the industry.

In discussing the new digital marketplace with professionals in PEI's writing and publishing discipline, two key sentiments were repeatedly shared: 1) Digital presents new opportunities, and 2) Digital is a 'double-edged sword'. In other words, technology has lowered barriers to accessing the market and at the same time, resulting in market saturation. Technological advancements have also shaped customer perceptions of 'value' and access to free content.

### 9.4.2 Writing as a hobby

In 2008, nearly 60% of surveyed professionals in this discipline on the Island reported that they considered writing as just a hobby, or a hobby that provides some income, a higher proportion than any other creative discipline, and far higher than the sector total of 36%.[55] With lower barriers to entry than ever before, anyone can pursue writing and publishing as a hobby. At the same time, increased access to markets and promotional channels has also allowed more aspiring writers to derive income from what may have started out as a hobby. However, as is the case in some other creative disciplines, the lack of professional development and networking opportunities may serve as a barrier to advancement.

### 9.4.3 Cross-disciplinary collaborations

With literary works increasingly published digitally, there are new opportunities for writers and publishers to collaborate with other creative professionals to provide readers/audiences with a rich multi-media experience. Written works are increasingly being combined with apps and games, soundtracks and visual arts (e.g., comic books). One writer (Patti Larsen) says self-published books can be a 'launch pad' to other revenue streams in a multi-media world, as it is one way to find an audience for other types of media based on your stories.

However, consultations revealed that writers and publishers on PEI often find themselves isolated from other cultural disciplines, and given the accessibility granted by the Internet, often collaborate with professionals outside of PEI.

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[55] PEI Cultural Human Resources Council (2008), *Prince Edward Island's Cultural Labour Force: A Supply and Demand Study*.

## 9.5 Looking ahead

It is not expected that the workforce in writing and publishing will grow over the next two to four years. However, it is anticipated that writers and will increasingly embrace self-publishing, requiring a focus on building digital and entrepreneurial skills.

In this context, the writing and publishing discipline on PEI will need to mitigate the following labour market challenges:

- Lack of opportunities to collaborate with creative talent in other jurisdictions and disciplines;
- Limited access to discipline-specific entrepreneurship skills development opportunities;
- Difficulties presented by new digital challenges, including discoverability in the digital sphere; and,
- Misaligned financial support programs.

These challenges are further explored in the following section, along with the opportunities identified in the disciplines.

## 9.6 Challenges and opportunities

**Challenges facing PEI's Writing & Publishing discipline**

**GAPS IN THE VALUE CHAIN**

**Lack of opportunities to collaborate with creative talent in other jurisdictions and disciplines**

*Impacts: New entrants, professional development*

- Collaboration opportunities are missed because there are few occasions where writers and publishers can interact with creative professionals in other disciplines.
- Although barriers to national and international collaboration have somewhat been lowered by technological advancement, opportunities for collaboration are potentially limited by technological, socio-economic disparity.

**SKILLS GAPS**

**Limited access to discipline-specific entrepreneurship skills development opportunities**

*Impacts: New entrants, professional development*

- Given the shift toward self-publishing and promotion, general business training is a gap in the discipline. In particular, there is a need for increased financial literacy among authors, e.g., knowledge of loans, community-based micro-funding models, and other sources of financial support.
- There is a perception among some writers that focusing on the business aspects of their practice somehow diminishes their artistic practice, which can serve as a barrier to their competitiveness.

| **Difficulties presented by new digital challenges, including discoverability in the digital sphere** |
|---|
| *Impacts: New entrants, professional development* |

- The increasing use of digital resources requires new skills not currently available to the Island's writing and publishing discipline, e.g., maintaining an online presence, using digital resources to market work, digital publishing, and online marketplaces.

| **ECONOMIC BARRIERS** |
|---|
| **Misaligned financial support programs** |
| *Impacts: New entrants, professional development* |

- Authors may not be aware of all of the support services for which they are eligible.
- Funders do not have a realistic perception of the financial requirements of digital publishing.

| **Opportunities in PEI's writing and publishing discipline** |
|---|
| **Developing entrepreneurship and digital skills** |

- Courses can be offered to increase financial and marketing literacy, e.g., development of business/marketing plans, budgeting.
- Courses can be offered to enhance writers' ability to leverage digital tools in production, dissemination and marketing, e.g., e-publishing, online marketing, social media engagement, metadata elements and best practices.

**Increasing professional development opportunities, such as mentorship initiatives**

- Mentorships can allowing new entrants to learn from more experienced writers/self-publishers – this model has to enable give and take between mentor and mentee, ensuring a value-add for both parties.
- Mentors can also advise on financial support sources, such as grants.

**Facilitating dialogue between funders and industry**

- In order to ensure that the impact of public investment in this discipline is maximized, funders can solicit feedback from writers and publishers to gauge the ability of programs to mitigate real industry challenges.

**Networking and collaborating with other creative disciplines**

- Increased opportunities to network and interact with professionals in other creative disciplines can highlight overlapping skills, collaboration opportunities and multi-media initiatives.
- Access to database of skills available in other disciplines.

## 9.7 Certification opportunities

Certifications are not considered highly relevant to the writing and publishing discipline, per se, though perhaps an author's qualifications may be an asset in non-fiction.

However, given the entrepreneurial spirit of the discipline on PEI, self-publishing guides, frameworks or training modules vetted by the PEIWG or organizations such as BookNet Canada or eBound Canada may be useful for writers who want to explore the possibilities of self-publishing. Aspiring self-publishers may also find it overwhelming to wade through all the available options for vendors and service providers and may benefit from a list of those tried and trusted by writers more experienced in self-publishing.

Additionally, one might consider periodic recognition from the PEI Writers' Guild. An award, designation, certification, given to an author who has met a level of quality and/or success in publishing their work, could help to distinguish said author's work as being of high quality.

## 10.Summary of Opportunities for the Sector

In the following section, discipline-specific opportunities identified in the preceding sections are summarized, followed by shared opportunities and sector-wide actions that have the potential to improve the ability of all disciplines to develop, attract and retain creative talent.

| Summary of Opportunities |
| --- |
| **Museums & Heritage, Libraries & Archives** |
| ▪ Cross-training within organizations |
| ▪ Leveraging and maximizing impact of student/intern placements |
| ▪ Promoting resource sharing and collaboration within discipline |
| ▪ Increasing collective advocacy efforts |
| ▪ Revisiting compensation structures |
| **Visual Arts and Crafts** |
| ▪ Increasing professionalization of the disciplines |
| ▪ Developing entrepreneurship and business administration skills |
| ▪ Increasing professional development and career advancement opportunities |
| ▪ Creating new economic opportunities through broadening the involvement of visual artists and craftspeople along the value chain and into other cultural disciplines |
| ▪ Developing PEI as an artist-friendly destination |
| ▪ Encouraging investment in and support of visual arts by other sectors of the economy |
| **Theatre, Dance and Multi-use Venues & Facilities** |
| ▪ Developing digital marketing skills |
| ▪ Encouraging innovation in content development and presentation |
| ▪ Increasing opportunities for professional development through mentorships |
| ▪ Facilitating cross-Island networking |
| **Music & Sound Recording** |
| ▪ Training 'vertically integrated' artists |
| ▪ Increasing professional development opportunities, such as mentorship initiatives |
| ▪ Increasing regional collaboration |
| ▪ Developing skills across value chain |
| ▪ Providing export development support |
| **Film & Television** |
| ▪ 'Nearshoring' in Atlantic Canada |
| ▪ Targeting support and focusing on niche segment |
| ▪ Increasing government support |

| Summary of Opportunities |
| --- |
| **Interactive Media** |
| ▪ Supporting the development of mobile games |
| ▪ Increasing collaboration with other creative disciplines |
| ▪ Simplifying local recruitment for companies |
| **Writing & Publishing** |
| ▪ Developing entrepreneurship and digital skills |
| ▪ Increasing professional development opportunities, such as mentorship initiatives |
| ▪ Facilitating dialogue between funders and industry |
| ▪ Networking and collaborating with other creative disciplines |

## Creating Authentic Connections: High Impact Potential Actions for PEI's Culture Sector Labour Force

As this report illustrates, the labour force of a culture sector is the raw material from which all the products and services in the sector stem. As such, taking steps to improve the potential (for success) of that labour force can have significant impacts on the success of the sector as a whole. The following are a number of potential actions that could be taken on PEI to that end.

**High Impact, Lower Effort Actions:**

- **Online Culture Sector 'Agora':** Given the collaborative nature of much of PEI's culture sector, practitioners would benefit from the creation of an online forum/marketplace (or "agora"). This agora would allow members of PEI's cultural community to share experiences (e.g., with grant applications), post work/employment opportunities and coordinate events.
- **Improved Regional Integration:** As PEI's culture sector is inherently limited in scope by the size of its labour force, PEI may opt to increase the level of integration it maintains with other Atlantic Canada culture sectors. This initiative would build on the existing working being done by the Atlantic Public Art Funders (APAF), and could include integration with (or 'nearshoring' some work from) other Atlantic provinces.
- **Expanded Showcases:** While some disciplines in the culture sector do well in terms of self-promotion, there is a need for an increased level of public awareness for the culture sector on PEI. To this end, PEI could opt to expand existing showcases (e.g., Showcase PEI) to cover the whole sector. This initiative could build on the work of organization like IMAC.
- **Coordinated Volunteer Training:** Many students are often first exposed to the culture sector through summer volunteer positions in heritage and other cultural organizations. As these experiences can be a 'professional gateway' into the sector, a sector-wide training initiative would be an effective touch-point for informing youth about potential career paths across the various disciplines.
- **A "Standing Committee" on Culture:** While not directly related to the culture labour force, the conversation(s) stimulated by this report (and its research phase) should continue. To that end, PEI may opt to form a "standing committee" on culture, an independent committee comprised of rotating representatives from all cultural disciplines that would speak on behalf the sector as a whole with one voice (in advocacy efforts) and coordinate events among the various disciplines.

**High Impact, High Effort Actions:**

- **PEI100:** Modelled on the successful C100 network that supports technology entrepreneurs, PEI could develop a network to connect Islanders that have moved away to opportunities that arise at home – and to each other. This initiative would rely on one of PEI most important assets: the sense of belonging that Islanders have when they leave, while helping local businesses re-patriate skilled workers (after they hone their skills off-Island).
- **Island Arts + Innovation Centre:** Modelled on the Made in NY Media Center, this initiative would provide a physical space at which professional development, exhibitions, and other events could be held. This centre would bring together several of the initiatives suggested above (e.g., co-working, training, showcases collaboration, etc.) into a single focal point, while creating a location where cultural workers can meet, convene and work.