SUSTAINING NEW BRUNSWICK'S arts and cultural workforce

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MESSAGE FROM ARTSLINK NB PRESIDENT KATHY HAMER

ArtsLink NB is very pleased to present this report, the first to examine in depth the current arts and culture sector in anglophone New Brunswick. Through two surveys, one designed for individual artists and culture workers, the other for arts and culture organizations, the report provides considerable current demographic analysis. In addition, it examines regional and national statistics with a view to making recommendations for measures to strengthen and sustain a viable arts and culture sector in the province. In the context of other important projects currently underway or nearing completion - the renewal of the Cultural Policy, the cultural industries strategy, the working group on human resources in the arts and culture sector - the report is both relevant and timely.

We wish to thank the Department of Post-Secondary Education, Training and Labour for providing funds to engage a consultant for this project, and the Department of Tourism, Heritage and Culture for its ongoing support and interest. Economic development expert David Campbell designed the surveys and provided detailed analysis of the information they provide, gathered data from a number of other sources, proposed a number of specific recommendations, and prepared the report. We are indebted to him for his patience, interest, and expertise. We would like to thank most especially the many members of the arts and culture sector who responded enthusiastically and in impressive numbers to our request to complete the surveys: it is their input and their many thoughtful comments that have provided information, insights, and suggestions for future directions in the sector.

We hope this report will contribute to the ongoing provincial conversation about a sector that is critical to our quality of life and social and economic well-being.

Kathy Hamer

Kathy Hamer, President
ArtsLink NB

Canada New Nouveau Brunswick

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Prepared for:
Interdisciplinary Arts Association of New Brunswick Inc.
(ArtsLinkNB)

Prepared by:
Jupia Consultants Inc.

MESSAGE FROM MINISTER DANNY SOUCY

The Government of New Brunswick is pleased to support **ArtsLink NB** in their efforts to advance the arts and culture sector in New Brunswick. Arts and cultural workers are an important cohort in New Brunswick's vibrant workforce.

Sustaining New Brunswick's arts and cultural workforce is the first study of its kind ArtsLink NB has undertaken, and the results provide us an important benchmark on which to build. Our government's goal is to rebuild New Brunswick with a focus on job creation and a strong labour market. This report helps us better address some of the industry challenges in this regard.

Our government's vision of creating a stronger economy and an enhanced quality of life, while living within our means, can only be realized when we collaborate with stakeholders like ArtsLink NB.

The arts and culture sector directly and indirectly contributes an estimated $1 billion to the provincial economy. As such, we all have a role to play in our collective effort to foster a durable arts and cultural workforce across the province.

I wish to congratulate ArtsLink NB on the launch of this important study.

Minister Danny Soucy
Department of Post- Secondary Education, Training and Labour

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I. INTRODUCTION TO THE REPORT:

A. PURPOSE OF THIS REPORT

This report was commissioned by ArtsLinkNB, a member-based organization representing the non-Francophone arts and cultural sector. At present the organization represents 511 individual members, 269 professional artists and 70 arts organizations in the Province of New Brunswick. The mandate of ArtsLinkNB is to advance the arts in New Brunswick by linking and unifying artists and arts organizations and promoting their value to the community.

ArtsLinkNB is committed to promoting the growth and development of the New Brunswick arts sector through information, education, member services and by representing the membership through participation in provincial, regional and national government, business and cultural forums and initiatives. This report represents an important first step in gathering information from the members and the province's artistic community in order to ensure their interests and needs are identified and addressed.

This report is meant to be an evidence-based analysis of the state of the arts and culture sector workforce in New Brunswick. The focus is on individuals who are earning an income through their artistic endeavours. The report's main purpose is to provide insight and recommendations that will foster stable labour force development in the arts and culture sector of New Brunswick. The findings include an examination of barriers to attracting and retaining talent as well as local and export market considerations, infrastructure and training needs. ArtsLinkNB's view is that all stakeholders have a role to play in this effort to foster a strong and durable arts and cultural workforce across the province. Therefore, in addressing development of the cultural workforce sector recommendations will speak to the role of ArtsLinkNB, government and the private sector.

The report is timely in that the Government of New Brunswick has established a Cultural Policy Working Group as it looks to the development of a new cultural policy for the province.

B. APPROACH TO THE RESEARCH

In the process of compiling this report, a number of important research tools were utilized including a broad-based survey of New Brunswick artists, cultural workers and related institutions. In total more than 360 individual artists and cultural workers filled out the survey. Another 38 arts and cultural organizations employing or supporting artists filled out a separate survey to provide insight at the institutional level. The number of respondents and cross section of disciplines provides a positive base from which to develop recommendations. The survey also allowed for considerable qualitative feedback. This information garnered from the sector's participants delivers a rich context in understanding the quantitative results. In addition, feedback on the results was also provided by representatives of the artistic community during the development of the report.

The report also includes a review of recent Statistics Canada data on the cultural sector in Canada. Unfortunately, detailed occupational data from the 2011 Census will not be publicly available until sometime in 2013 so the occupational profile relies heavily on the 2006 Census. The report also relies on statistics and reports published by other organizations including Canadian Heritage, the Canada Council for the Arts, New Brunswick government reports and other publications from organizations such as Hill Strategies.

II. NEW BRUNSWICK'S ARTS AND CULTURAL WORKFORCE: KEY FINDINGS

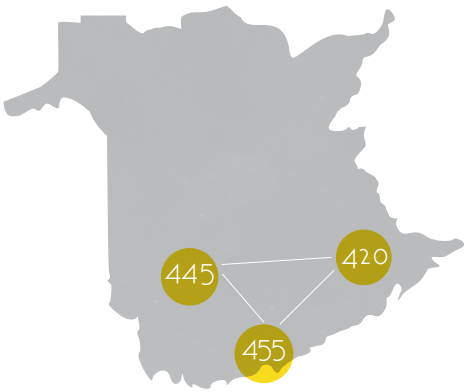
Across a variety of metrics, the profile of the New Brunswick arts and cultural workforce at present is not as strong as elsewhere in the country. From an employment as well as an economic output perspective, New Brunswick's arts and cultural sector is stagnating while it has been expanding in the rest of Canada. The province's artists and cultural workers are highly educated; however, their careers are characterized by part-time employment and lower than average wages. The workforce is also aging faster than the rest of the country as many younger artists move out to develop their careers elsewhere.

The 2006 Census is the best data available on the arts and cultural workforce, although interpreting it poses some challenges. Statistics Canada uses a very broad definition of arts and culture employment, including workers in media, communications, public relations, translation, interpretation and libraries. Meanwhile, other organizations such as Hill Strategies Research and the Canada Council for the Arts use significantly narrower – and, for the purposes of this report, much more relevant - definitions. Comparing and confronting the various approaches and methodologies was beyond the scope of this study, although the difficulties they pose suggest a strong need for greater clarity in official (i.e. Statistics Canada) reporting on the sector. Clear data on the arts and related occupations would better serve the sector than the broad aggregates currently used.

The 2006 Census figures, based on a broad definition of arts and cultural occupations, show over 7,500 persons working in these positions in New Brunswick. Statistics Canada's Labour Force Survey data suggests the number of people working in the sector in this province is stagnant, in contrast to Canada as a whole, which has seen strong growth. According to this research, New Brunswick has the second lowest intensity of arts and cultural workers in Canada - 44 percent below the national average. Only Newfoundland and Labrador ranks worse.

In terms of the distribution of arts and cultural employment intensity across New Brunswick, the 2006 Census shows Fredericton faring well based on broad definitions of the sector, ranking 18th out of 146 Canadian cities. On the same list, Moncton ranks 41st, Saint John 80th.

Quite a different – and much more consistent - profile of the workforce emerges when a stricter definition of "artist" is applied, with 445 artists working in Fredericton, 420 in Moncton and 455 in Saint John. *



FREDERICTON
445
MONCTON
420
SAINT JOHN
455

NUMBER OF ARTISTS IN N.B.'S BIGGEST CITIES

* Appendices containing a fuller breakdown of the data are available online at www.artslinknb.com. Table 1: Artists in New Brunswick in Section 1.1 of Appendix 1: Arts and culture sector employment statistics and profile shows the breakdown of artists in four New Brunswick cities, based on the narrower definitions referred to above. The expanded occupations list used by Statistics Canada is found in Table 4: Arts & Cultural Employment.

New Brunswick's arts and cultural workforce does have a significant part time or part year work component, particularly among technical occupations. Only 20 percent of those categorized as 'artisans and craftspersons' (as their primary occupation) worked full time/full year in 2005 compared to 41 percent across the country. Certain cultural occupations such as journalists, communications professionals and graphic arts technicians have a similar full time/ part time profile to the rest of the country. However, among those who are classified as artisans and craftspersons, only 20 percent indicated they were working at this occupation full time and full year – well below the national average. This data is backed up by the artists' survey completed for this report which found that only 31 percent of the artists responding indicated they were employed full time in the arts. Among workers who are not working full time in their artistic/ cultural endeavours, eighty-three percent said they would prefer to work full time if it were financially feasible. Of concern is the fact that among those responding to the survey most had been working as an artist for more than a decade but were not earning full time wages as an artist.

Qualitative findings from the report show that many artists are juggling multiple jobs as well as managing all aspects of their artistic career beyond the creating aspect of their work.

New Brunswick's arts and culture workforce is aging faster than the country as a whole. Across the province there was a 37 percent decline in the number of persons aged 25-34 working in arts and cultural occupations between 1996 and 2006 while the number across Canada rose by 10 percent. In 2006, 18 percent of workers in professional and technical arts and cultural occupations were between the ages of 25 and 34 compared to 24 percent across Canada. Seventeen percent were above the age of 55 in New Brunswick compared to 14 percent across the country. Canada is witnessing growth among the younger cohort of artists and cultural workers while New Brunswick is not. The number of workers in arts and cultural occupations aged 45 and older is increasing at a relatively similar rate in New Brunswick and Canada as a whole (between 1996 and 2006). However, among the three younger cohorts the number of workers in New Brunswick is in an outright decline while continuing to grow across Canada. There were substantial declines in the 20-24 year old and 35-44 year old age cohorts. As another indication of the greying workforce, in the survey of artists undertaken for this report, the second largest source of income was retirement/pension income. There is considerable concern among industry stakeholders that younger artists are leaving the province to pursue their careers.

The arts, entertainment and recreation sector is not among the highest paying in New Brunswick. In 2011, the average weekly wage for this sector in New Brunswick was just under $524 – or an annualized employment income of $27,248. As discussed previously many artists work in other industries in order to supplement the revenue they generate from their artistic or creative endeavours. In the 2006 Census, the average full time/ full year worker in New Brunswick earned 16 percent less than their counterparts across Canada. For those working full time/full year in professional occupations in art and culture the spread was only six percent less. Workers in technical occupations in arts and culture earned 13 percent less on average. However, for those working either part time or part year in professional or technical occupations in arts and culture they earned 31 percent and 28 percent less respectively compared to their counterparts across Canada.

In the artists' survey, two-thirds of the respondents reported annual income of less than $40,000 per year. Only 38 percent received at least 75 percent of their income from artistic endeavours (the rest of their income comes from other sources).

Despite the relatively lower income level, respondents to the artist/cultural worker survey are more educated than the population as a whole across New Brunswick. Nearly 22 percent of the respondents indicated their highest level of education was a graduate degree (including Phd) – more than four times higher than the population as a whole. Over 62 percent have at least a university degree – triple the overall provincial average.

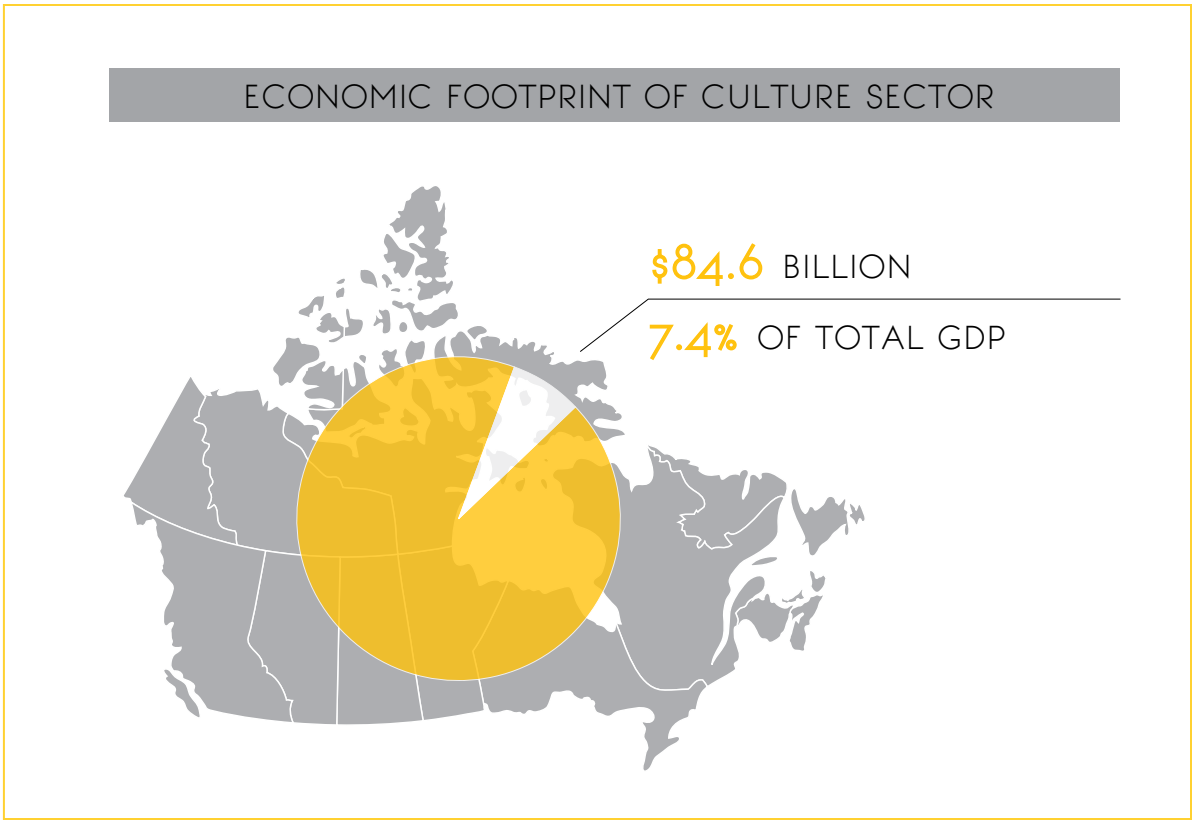
III. WORKFORCE BARRIERS AND AREAS FOR FURTHER DEVELOPMENT

Barriers to the development of New Brunswick's arts and cultural workforce relate to financial support/access to funding, market development concerns and training needs. All three of these areas must be addressed in order to foster a vibrant and sustainable arts and culture workforce in New Brunswick.

A. FINANCIAL SUPPORT AND ACCESS TO FUNDING

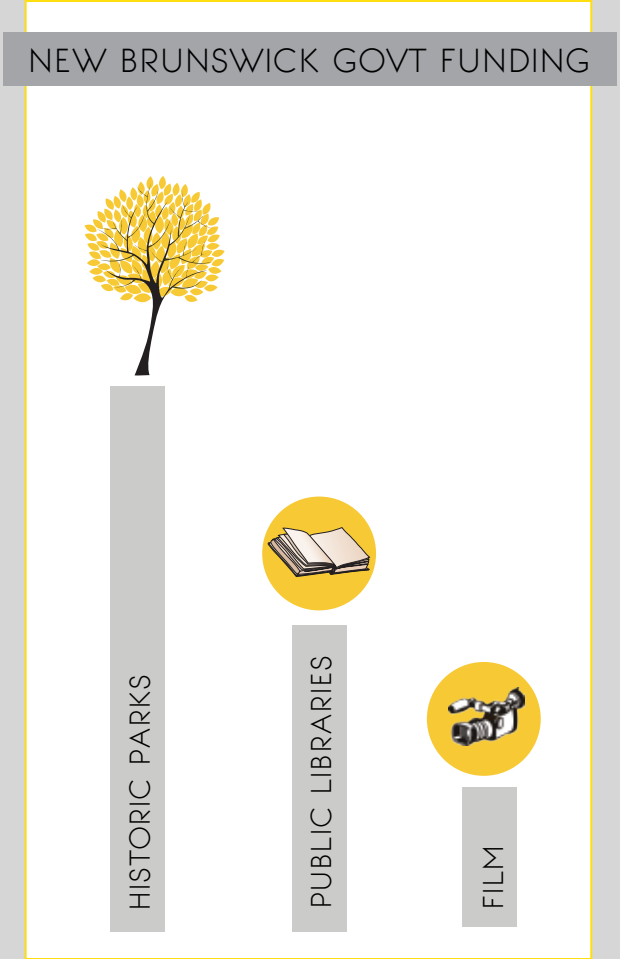
There is general agreement that culture should not be viewed solely for its economic contribution. Arts and culture add value to society in ways that cannot be directly measured by gross domestic product (GDP), employment or taxation levels. As a result, government support for the arts and cultural sector should not be boiled down to an economic calculus the way support might be with another sectors. However, arts and culture is a significant economic contributor to the Canadian economy. In a 2008 study, the Conference Board estimated the economic footprint of Canada's culture sector was $84.6 billion or 7.4 per cent of Canada's total real GDP, including direct, indirect, and induced contributions. In the study, culture sector employment exceeded 1.1 million jobs.

Unfortunately the last time Statistics Canada published a full review of New Brunswick's cultural industries was nearly a decade ago. At the time (2003), New Brunswick's total cultural output was estimated to be $549 million per year. If indirect and induced effects were to be calculated, the industry's total value to the provincial economy would approach nearly $1 billion per year. This is a sizeable and very important contribution to the provincial economy.



New Brunswick is well behind in Canada when it comes to investment in the arts (an important component of the culture industries) by the federal, provincial and municipal governments. In other jurisdictions government funding provides operational support to arts organizations (which are often the largest employers of a range of artists and cultural workers); it supports creation grants to individuals to start and develop their careers; and it generates opportunities for showings, demonstrations, festivals and touring—all of which serve to build a vibrant work force. This investment is critical for ongoing development and also the long term growth and sustainability of the work force.

Government in New Brunswick is providing less funding to most artistic and cultural activities compared to the country as a whole. According to Statistics Canada, the New Brunswick government spends the most in Canada per capita on historic parks and sites and the second most in Canada on public libraries but it spends well below average on performing arts, film and video production and among the lowest in the country on the visual arts and crafts sector.



The federal government spends 24 percent less in New Brunswick on culture compared to the national average. Over the seven year period reviewed in this report, the federal government spent approximately $586 per capita on culture in New Brunswick. This was 24 percent lower than the national average and lower than all provinces east of Manitoba. It spends above average on provincial parks and multidisciplinary activities but well below on literary arts, performing arts, film and video and multiculturalism. A significant amount of federal funding goes to CBC relative to other categories of spending.

One of the reasons overall federal culture spending in New Brunswick is well below average is related to Canada Council for the Arts (CCA) spending in the province. Between 1999/2000 and 2011/2012, CCA funding has been well below average. The Canada Council for the Arts spends 30 percent below the national average in New Brunswick on a per capita basis.

New Brunswick municipalities spend 57 percent less on culture than the Canadian average. Municipal governments across New Brunswick spent slightly more than $28 million on culture in 2009-2010 (the most recent year data is available). This represented approximately four percent of total municipal spending that year. The bulk of municipal cultural spending goes to libraries (65 percent).

Of the individual artists that filled out the survey for this report, seventeen percent received provincial government grants in 2011, six percent received support from the Canada Council for the Arts and only five percent received some type of financial support from municipal governments.

Some respondents were unclear as to the various funding mechanisms and whether or not they were eligible for funding.

Respondents were asked if they were eligible, have applied for or received funding from the Canada Council for the Arts. A little over 35 percent said they were eligible for CCA funding but another 58 percent didn't know if they are eligible or not (6.5 percent said they were not eligible). Just over a quarter of the artists/cultural workers who filled out the survey have applied to the CCA for funding (97 in total) and 26 have received funding at some point in their career (seven percent of the total).

Respondents were asked to comment on why they haven't received CCA funding or why they haven't considered applying. A number of artists applied once, were rejected and never reapplied. Several others felt the process was too complicated. There were multiple comments on the inconsistency of funding from CCA - that depending on the particular jury one time you might get funded and another time not. This inconsistency coupled with a complicated application process is a deterrent to applying for funding.

Of the 38 different arts and cultural organizations surveyed for this report, the average organization generated 45 percent of revenue from government sources and only 22 percent from product or service sales. This may, in part, be due to the small market in New Brunswick. Galleries and performance venues had a higher percentage of product/service revenue but all relied on either government funding or private philanthropy or both. Fourteen of the 38 organizations receive Canada Council for the Arts funding.

Many organizations were concerned about not having enough scale to offer much more than superficial support for their segment of the arts and culture sector. When asked to list challenges to their sector's growth, these organizations talked a lot about the lack of human resources and funding to tackle big issues that could move their organization to the next level to allow for growth, such as export development, fundraising support, mentorship development and training. These are key development areas for the province's large organizations which employ a significant number of artists and cultural/technical support workers.

It is also interesting to note the number of organizations that discussed New Brunswick's demographic challenges as a barrier to future growth. The out-migration of young artists, the aging population in general and the lack of immigration were all mentioned by multiple organizations.

Many organizations felt that government and business support for the arts was well below what it should be compared to other jurisdictions.

B. MARKET DEMAND AND SALES

The consulting firm Hill Strategies Research Inc. was commissioned in 2012 to prepare a report on how Canadians are interacting with the country's arts and cultural sector. Data in this section comes from this report. It is based on 2010 Statistics Canada data from the General Social Survey.

According to the report, virtually all adult New Brunswickers participated in an arts, culture or heritage activity in 2010. A full 99.7 percent, or 634,000 people, participated in at least one of the 18 arts, culture or heritage activities identified in the Hill Strategies report.

Nevertheless, New Brunswickers are participating far less in most arts and cultural activities compared to Canadians as a whole. It is important to note that participation numbers are increasing. Nearly one in three New Brunswickers visited a museum in 2010 and 60.5 percent attended a performing arts event or a cultural festival. Unfortunately, the Statistics Canada data on performing arts does not differentiate between a local or national/international performer. Nearly 70 percent (68.6

percent) of New Brunswickers had visited a heritage venue (including historic sites, zoos, botanical gardens, conservation areas and nature parks). Almost everyone (96 percent) had read a newspaper, magazine or book in 2010.

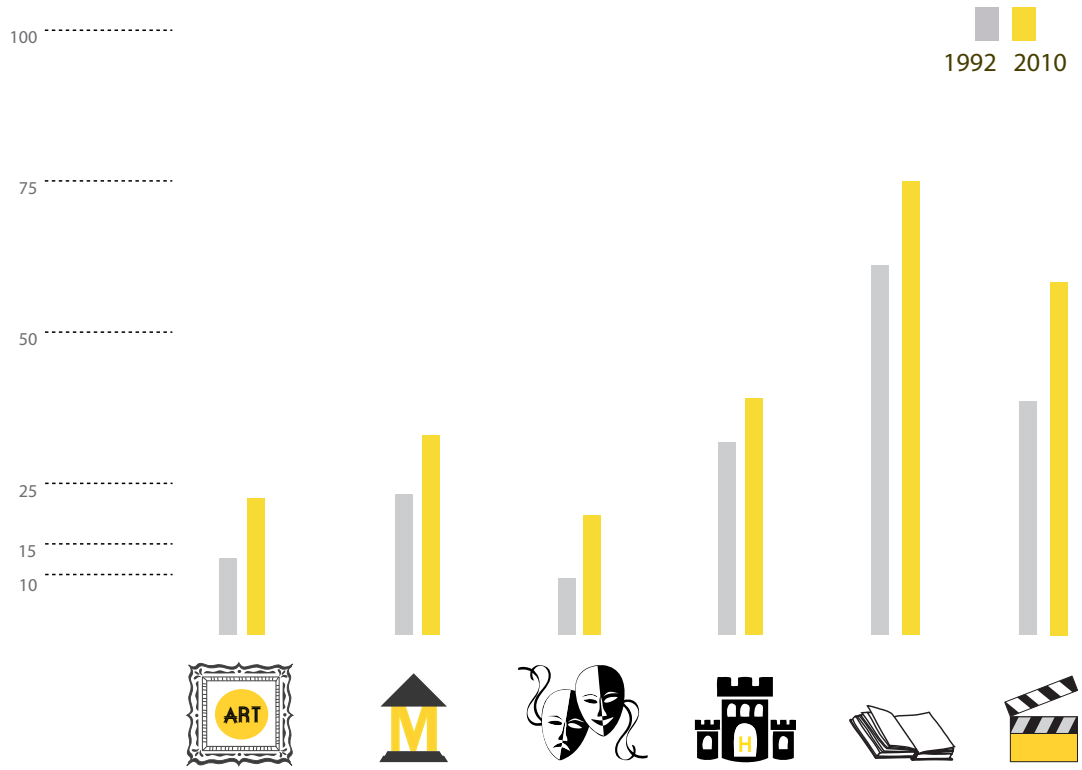
The report shows the changing pattern of New Brunswickers participating in arts and cultural activities over time. Between 1992 and 2010, there was a jump in the number of people visiting art galleries (from 12.6 percent in 1992 to 22.6 percent in 2010) and a fairly significant increase in the number of people visiting museums (23.2 percent in 1992 compared to 32.9 percent in 2010).

The percentage of adults attending performances of cultural or heritage music, theatre or dance rose from 9.4 percent in 1992 to 19.7 percent in 2010 and the percentage visiting historic sites increased from 31.8 percent in 1992 to 39.1 percent in 2010. There were considerably more New Brunswickers reading books in 2010 compared to 1992 (61.1 percent in 1992 and 75.0 percent in 2010) and increases in the number of persons visiting zoos, botanical gardens and conservation areas or nature parks.

One of the largest increases was in the number of persons going to the movies. In 1992 only 38.6 percent had attended the movies at least once during the year while in 2010 it was up to 58.4 percent.

In terms of generating sales among artists filling out the survey, a majority of their artistic/cultural product sales (55 percent) came from customers outside their local community. For the average artist, 28 percent of revenue comes from clients outside New Brunswick. A total of 61 artists generate 50 percent or more of their revenue

PATTERN OF NEW BRUNSWICKERS PARTICIPATING IN ARTS & CULTURAL ACTIVITIES



outside New Brunswick. An increasing number of artists are using social media and the Internet to promote their products but very few are paying for online advertising. Word of mouth is still considered to be the most important marketing channel by the artists.

Arts and cultural organizations tend to use more traditional means of advertising such as newspaper, radio and television. Positively, over 80 percent of the organizations surveyed are involved in some form of joint marketing such as joint gallery promotion, co-presenting activities and guest artist collaborations.

The arts and cultural organizations were asked to express their confidence in a variety of management attributes. In general the organizations were highly confident in their ability to manage people, plan and manage finances and promote the organization. They were less confident in their ability to generate sales.

Outside of artistic development the top concerns of artists responding to the survey related to market development. Their top concerns were as follows: 88% - finding my audience or customers and market; 85% - promoting my work in N.B.; 81% - promoting my work outside of N.B.; 76% - making sales.

The importance of raising public interest within New Brunswick was considered critical for market development activities. This was the most cited issue among the respondents. There is a clear sense among this group that the public and its main institutions are not particularly interested in art and the culture sector more broadly. There was talk of limited attendance to local visual art shows and performing arts presentations. A number of people suggested that artists were not put in a similar class as other professionals.

Marketing and promotion of New Brunswick artists outside New Brunswick was also cited as a key issue among individuals and organizations. The lack of agents, joint promotion and the distance from high potential markets were three recurring themes. A number of artists expressed frustration but also said that they are not doing a good enough job of promoting themselves outside their community. Accessing the agents, markets and training to support these activities is a key workforce development area.

C. RECRUITMENT, RETENTION AND TRAINING

Individual artists respondents were asked to indicate the resources they access to help them develop skills as an artist (this was an open ended question). Professional associations including ArtsLinkNB were mentioned by about one-third of the respondents. Economic development agencies such as Enterprise Saint John were mentioned by a number of artists.

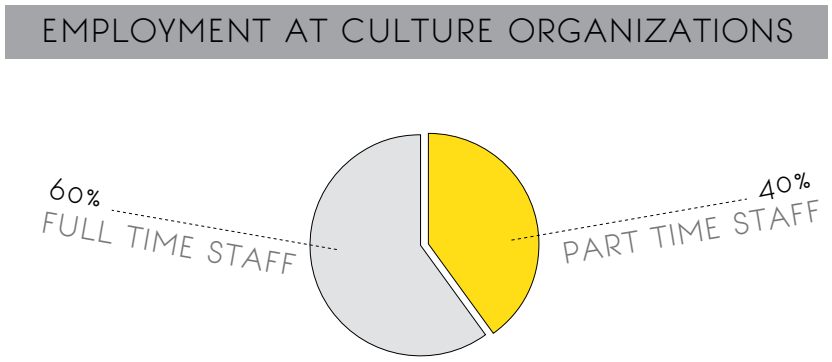
Persons taking the survey were asked to rate a number of business skill development topics from most important to not at all important. Similar to the findings elsewhere, marketing and sales development are the most important business skills according to the respondents. Managing the business along with similar issues such as proposal writing and raising funds were considered important.

Survey respondents were asked if there were specific programs or services they would like to see offered in New Brunswick. Over 190 artists provided responses and the top can be grouped into four categories (in order of intensity):

- **Programs that support grant/ proposal writing skills**
- **Access to agents for market development**
- **General marketing/sales support**
- **Business development skills**
- **Access to mentors**

The arts and cultural organizations utilize a mix of full and part time employment. The average organization has a split of 60/40 full time and part time staff. Seventy-four percent employ at least one part time staff (among those with staff – four organizations do not feature any paid staff).

When it comes to their workforce, only 11 organizations have any kind of formal training program in place. Financial constraints limit these activities. They have a harder time recruiting than retaining staff. Forty-four percent of the arts and cultural organizations surveyed said they had difficulty recruiting qualified staff. The main reasons cited were uncompetitive salary levels and the small size of the local talent pool to recruit from. Younger artists leaving New Brunswick may also be a factor. Several cited the difficulty finding staff that 'fit' the organization's culture. For the few that struggle to retain staff, the main issues are wages as well as staff burnout and limited opportunities for career advancement within the organization. The ability to offer competitive wages to attract and retain talent as well as training and career development opportunities is a key consideration in workforce development for the arts and cultural sector. Without this - talent will leave the province.



IV. RECOMMENDATIONS: SUSTAINING NEW BRUNSWICK'S ARTS AND CULTURAL WORKFORCE

Recommendation #1:

All three levels of governments should target boosting their contribution to arts and culture to at least the average per capita spending across Canada.

This is a significant goal during a period of public sector austerity. However, a stable, vibrant and sustainable arts and cultural workforce is dependent on an adequate investment in the arts by all levels of government. While we do not have the most recent estimates of total cultural contribution, we know it is a significant economic sector in Canada and in New Brunswick. GDP trends in the arts, entertainment and recreation sector (a subset of the broader cultural output) can be used as an indication of how the industry has been progressing in recent years.

Since the Government of New Brunswick Cultural Policy released in 2002, real GDP (i.e. adjusted for inflation) from this sector declined by 10.2 percent (only one other province saw a decline in real GDP from this sector). In addition, employment in arts and cultural occupations has been flat. Only Newfoundland and Labrador has fewer people working in art, culture, recreation and sport occupations.

The 2002 cultural policy stated the following: "The economic benefit of cultural products and activities, as well as the associated employment opportunities, are of growing importance to New Brunswick. A supportive environment for the growth of the province's cultural sector is a sound investment that will help position New Brunswick competitively within global markets." The ability to foster a sustainable arts and cultural workforce is based on strength of the arts and cultural institutions and support services available to the sector. The research for this project suggests that many of the province's flagship arts organizations are struggling and unable to properly plan for the future. In addition, many private and corporate sources of arts and culture funding are moving away from operational support towards project-specific funding. This is putting even more pressure on the ability of local arts and cultural organizations.

As outlined above, all three levels of governments spend well below average on arts and culture in New Brunswick. Areas of development could include:

- In order to encourage greater financial support for arts and culture from the federal government, the provincial government should consider developing a bilateral funding agreement that develops a shared set of priorities and outcomes.

- Designating the arts and culture sector a strategic sector and making it a priority for the Department of Economic Development and other allied economic development organizations. There have been some attempts to view arts and culture from an economic development perspective but those have been limited. If we are to foster more entrepreneurship, increased exports and private investment into the arts and culture sector we should treat it as an economic opportunity just the same as the information technology or manufacturing sectors and give it access to the programming and services offered by government. It is true that arts and culture has value well beyond the dollars and cents but there is certainly an economic model for supporting the development of the sector.

- Consider an arts and culture levy on imported cultural products New Brunswickers consume a considerable amount of imported cultural products including imported live performing artists, writers, packaged music and movies. It is a healthy and important part of our development as a society to be exposed to cultural products from around the world. Governments should not overtly restrict New Brunswicker access to imported cultural products. However, there is a strong case for development of homegrown artistic and cultural product. It fosters pride of place and supports commitment to community.

A relatively limited levy on imported cultural products could generate a significant new revenue stream for the arts and culture sector. While Statistics Canada does not segment out imported cultural products at the provincial level, based on consumer spending patterns it is likely the total spending each year is in the range of $100 million to $150 million (this includes pay television). A small four percent levy would result in between $4 million to $6 million per year in revenue that could be allocated directly to support development of the local arts and culture sector. Even if certain cultural products were excluded, the amount from the levy could be significant.

This would be no different in concept than airport fees tied to tickets that are used to develop a local airport. It would also draw a direct link between the public and funding for arts and culture.

This would be a novel approach to funding the arts but once in a while innovations can occur in a place like New Brunswick.

●●●●●● Promote artistic champions
New Brunswick is a small province with relatively limited resources. This is not just a challenge faced by governments. Disposable income is lower in New Brunswick compared to most other provinces and many of our businesses operate in highly competitive markets and face shrinking profit margins.

This limited resources reality can lead to government spreading its investment thinly across a wide range of artistic and cultural endeavours and limiting the potential for a small number of high potential artists and organizations to excel.

The mission statement in the 2002 Cultural Policy states the government will foster "excellence in the work of [New Brunswick] artists". This is an important theme that must be reinforced in the new cultural policy.

Recommendation #2:

Develop an arts and cultural worker recruitment and retention strategy in cooperation with all levels of government and economic development agencies.

There is a growing concern among the sector about the future talent pool. As discussed above, the number of people under the age of 45 working in arts and cultural occupations is in a relatively steep decline. In the artists' survey conducted for this report, a number suggested many of our best and brightest young artists leave the province to pursue their passion elsewhere. In the public consultations on the new cultural policy for New Brunswick (held in September/October 2012), the need for arts education was a central theme; however, the Province is not retaining much of the talent coming out of the education system. Without a strategy to develop a workforce in New Brunswick the training dollars are not enhancing the economic development of the province or fostering stable workforce development.

It is important to expand our understanding of the role of arts and culture and its impact on the creative economy. Prosperous jurisdictions in the 21st century will be those that can foster creativity and innovation. Visual artists, performing artists, writers, photographers, graphic designers and other creative occupations should be understood as important contributors to this broader objective. The fact that New Brunswick has the second lowest intensity of people employed in arts and cultural occupations should be seen as a barrier to the province achieving its economic potential in the years ahead.

New Brunswick is a small province and demographic issues go well beyond the arts and culture sector. However, there are many ways to develop the talent needed to foster a vibrant and dynamic arts and cultural community including:

●●●●●● Promoting examples of artistic and cultural excellence. New Brunswick artists need role models – they need to see that success can be achieved in this province.

●●●●●● Providing training on the scope of funding and grant opportunities and marketing support available to artists and organizations in New Brunswick to help them find ways to stay in the province.

●●●●●● Working with the information technology (IT) sector to foster the development of creative industries. Video game development, social media and other emerging technology-based sectors also have a high creative component.

Recommendation #3:

Build the profile of the arts and culture sector in New Brunswick as a source of pride and identity.

Probably the most discussed issue in the surveys among artists and the organizations was the need to raise public awareness within New Brunswick about the arts and culture sector and its contribution to our way of life. The Province of Newfoundland and Labrador as well as Quebec have put a great deal of emphasis on promoting their own artists and cultural organizations as a rich source of pride and identity.

- Work with the Government of New Brunswick and other arts and cultural organizations to develop a public awareness campaign to learn and promote our artists and cultural organizations.

- Include information on our artists and cultural groups as part of the education curriculum and learning about our province.

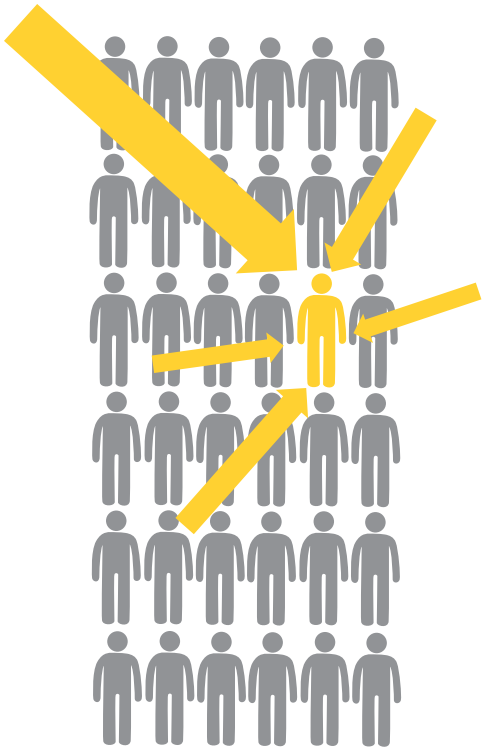
- Promote exposure to the arts at a young age in cooperation with the Department of Education and the many organizations, institutions and individuals who provide training opportunities. Youth who are exposed to the arts are more likely to attend, participate and support the arts in adult life.

- Evaluate the potential of crowdsourced funding for arts and culture The New Brunswick government is developing the use of crowdsourcing as a funding source for companies and new entrepreneurs. In this setting, small individual owners are able to invest relatively small amounts in companies or other projects either for equity or other considerations (such as early access to a new product).

In the United States, crowdfunding is rapidly becoming a major source of funding for the arts. The largest service provider, Kickstarter, now raises more funding for the arts than the National Endowment for the Arts (NEA). According to recent media reports, Kickstarter funded $150 million worth of arts projects in 2011 while the NEA funded $146 million.

New Brunswick is a small province but the crowdfunding model could be an exciting new way to engage the public. Just like other projects on a service like Kickstarter, artists and arts organizations could propose developing a new project subject to the ability to raise funds to cover an initial portion of the costs. The public would be encouraged to contribute small amounts in return for some consideration – tickets to a show, access to a VIP reception, etc. but the real value would come from their support of the arts. Again, the U.S. model shows this can be an effective way to raise funds but it would need to be tested in New Brunswick.

CROWDSOURCING



Recommendation #4:

All artists and groups should have equal opportunity to public support - assuming they meet the criteria for funding.

Irrespective of linguistic or cultural community, access to funding and other opportunities for development should be equitable across the artistic community. Support for touring within the province, and for development of export opportunities, are areas in which equal opportunity for Anglophones, Francophones, First Nations and multicultural artists should be a fundamental principle.

Recommendation #5:

Develop an export market training and development strategy.

Expanding export markets was a top priority of the artists and organizations surveyed for this report. It is an important potential source of revenue growth for the province's artists working in a small province with a limited market. Among those surveyed for this report, 11 of the 38 organizations generated at least some sales revenue outside the province. Most of the individual artists and even organizations felt they didn't have the scale or the skills to export effectively.

Not all artists or artistic and cultural institutions are developing products that are exportable. Among some artists and organizations there can be an exaggerated sense of export potential. New Brunswick artists should have greater exposure to international markets through exchanges, residencies and mentorships. This will help clarify the true potential and put the focus should be on those artists or institutions that have exportable product. Export support programs offered by the New Brunswick Department of Economic Development should be accessible by artists and organizations. If their products are exportable, the industry should be treated no differently than any other exporting sector. Also there are a number of highly successful New Brunswick artists exporting product around the world. The lessons of these artists should be learned for other emerging artists and organizations around the province. In addition, there are some artists that are using external agents to market their products. ArtsLinkNB can play an important role in helping connect artists with these agents through the development of artist networking, mentoring and training opportunities between exporting and non-exporting artists.

It is also important to point out that tourists represent an 'export' market. The only difference is the export market comes to New Brunswick. As shown in in the survey, some artists are able to segment out their tourism business while others are not. ArtsLinkNB needs to work with the provincial and federal governments to find ways to help artists and cultural organizations determine their export potential and then treat these artists and organizations like any other exporting sector.

Recommendation #6:

Support on-going training in market/ business development.

Most New Brunswick artists have completed post-secondary education but there is a need for ongoing training for them in a variety of areas. According to the artists' survey conducted for this report, artists would like to see broader access to training options related to marketing and business development.

According to those surveyed, the largest area of concern was related to market development and sales. Expanding

personal networks was also considered to be important or very important to 85 percent of respondents.

There is an important role for ArtsLinkNB to fill this need for specific training and to support expanding networks for artists in the province. ArtsLinkNB, with its membership of almost 300 professional artists, along with a number of emerging artist members, is well-positioned to address a number of the needs expressed by respondents to the survey. To meet its mandate of service to its members and to the enhancement of the provincial arts and culture community, the following should be considered as projects for which specific funding could be requested:

- Funding assistance for a significantly improved ArtsLinkNB website. Given the geographic distribution of the organization's membership, ArtsLinkNB could meet many of the needs identified in the survey through an improved, flexible, highly interactive website. This basic tool would offer opportunities for artists to include and update their personal websites, for interactive workshops, a flexible and easily usable database, dissemination of news, grants opportunities, etc. An Anglophone website comparable to the site created for the Francophone community in New Brunswick would do much to enhance and equalize access, collaboration, training, and achievement for all members of the New Brunswick arts and culture community.

- Funding for a pilot project - expansion and/or continuation to be determined based on evaluation - to offer short-term, low-cost online workshops in basic business skills: marketing, tax preparation, bookkeeping, etc.; online workshops to be paired where feasible with face-to-face workshops offered in centres around the province (e.g. Saint John, Moncton, Fredericton, Sussex, Sackville, Miramichi, Bathurst, Woodstock, etc.).

Recommendation #7:

Foster better collaboration within the arts and culture sector and workforce.

Both the artists and the organizations surveyed for this report felt there was little cooperation between various segments of the arts and cultural community and this lack of collaboration was holding back growth. New Brunswick is faced with the unique context of having English and French language arts and cultural institutions. Many felt there should be more opportunity for collaboration within these groups. The artists surveyed for this report indicated a number of ways that more collaboration would be beneficial including:

- Over 80 percent of respondents said that collaborating with other artists to build market demand for artistic and cultural products was either important or most important.

- A majority said that more should be done to showcase local artists and their work.

- A significant percentage said they would benefit from a mentor.

ArtsLinkNB can assist by further developing networking opportunities with specific themes and goals to help New Brunswick artists to learn and build opportunities with peers.

Recommendation #8:

Develop models to assess the effectiveness of programs and investment.

In order to develop our artistic and cultural workforce we must also put in place the tools to measure outcomes and success. ArtsLinkNB should partner with government to develop a series of data points on the industry's workforce that can be compared over time and used in the development of performance measurements.

APPENDIX 1: ARTS AND CULTURE SECTOR EMPLOYMENT STATISTICS AND PROFILE

1.1 NOTE ON METHODOLOGY

Interpreting data relevant to the arts and culture sector, whether in New Brunswick or across Canada, poses some challenges. Statistics Canada uses a very broad definition, including activities that though cultural in the broad sense (newspapers, broadcasting, public relations, translation, etc.), are not strictly relevant to what would normally be considered the creative and performing arts - the sector represented in the membership of ArtsLinkNB. Statistics Canada data used by other organizations in the arts and culture sector, such as Hill Strategies and the Canada Council, use significantly narrower definitions. Comparing and confronting the various approaches and methodologies was beyond the scope of this study, although the difficulties they pose suggest a strong need for greater clarity in official (i.e. Statistics Canada) reporting on the sector. Clear data on the creative and performing arts and crafts, and the occupations related to them, identified as a sector distinct from such other cultural activities and institutions as newspapers, broadcasting, public relations, interpreting and translation and the like, would better serve the sector than the broad aggregates currently used.

Table 1 below shows the breakdown of artists in New Brunswick cities based on the narrower definitions referred to above. The expanded occupations are discussed below.

Table 1 : ARTISTS IN NEW BRUNSWICK - based on Hill Strategies Use of Statistics Canada 2006 Census Data

National Group Classifications for "Artist" Used by Hill Strategies Research and Canada Council	Edmundston	Fredericton	Moncton	Saint John	New Brunswick
F035: Actors and Comedians	0	30	15	0	60
F144: Artisans and Craftspersons	0	75	50	90	465
F021: Authors and Writers	10	115	120	110	430
F032: Conductors, Composers & Arrangers	0	10	10	0	30
F034: Dancers	0	10	40	15	70
F033: Musicians and Singers	0	65	90	125	420
F132: Other Performers	0	10*	0	0	0
F036: Painters, Sculptors and Other Visual Artists	25	55	20	65	255
F031: Producers, Directors, Choreographers & Related	0	45	45	0	155
Total	**35**	**415***	**390**	**405**	**1855**
F121: Photographers [Not included in Hill Strategies #s]	20	30	30	50	180
Grand Total	**55**	**445***	**420**	**455**	**2065**

Notes: Fredericton data shows 10 in F132 category, but NB data shows 0 for NB as a whole. Data in these classifications is not available for Caraquet or Sackville.

APPENDIX 1: ARTS AND CULTURE SECTOR EMPLOYMENT STATISTICS AND PROFILE

1.2 DEFINING ARTS AND CULTURE

Statistics Canada (and Canadian Heritage) has developed a broad definition of the cultural sector that includes the following elements:

- Heritage and libraries including archives
- Performing arts
- Visual and applied arts including photography photo finishing services; certain aspects of advertising, public relations and related services and architectural services; landscape architectural services; specialized design services; and certain aspects of computer systems design and related services
- Written and published works including newspapers
- Audio-visual and interactive media including broadcasting
- Sound recording
- Related education and training
- Governance, funding and professional support related to the culture sector

This sector in total generated $549 million worth of gross domestic product (GDP) the last time Statistics Canada published data for New Brunswick in 2003.

Statistics Canada will be publishing new data on the cultural output in the near future but for now we do not have recent estimates. Therefore for this report the level of available statistical data covering the broader definition of culture is limited. There is annual data available at the Arts, Entertainment and Recreation sector (NAICS 71) and that is a reasonably good proxy for the arts and culture sector, albeit not inclusive. There is also considerable data relating to the performing arts sector and that information is included in this report.

One of the main purposes of the surveys of individual artists/cultural workers and organizations was to gather insight into the industry that is not available through formal statistical sources.

1.3 ARTS AND CULTURE GDP CONTRIBUTION

The New Brunswick arts and culture sector is an important contributor to the provincial economy. As mentioned above, the last time Statistics Canada published a full review of cultural output in 2003, the industry provided a direct contribution to provincial GDP of $549 million.

The $549 million in spending cuts across multiple sectors of the economy including libraries and heritage institutions, public relations, design services, etc. as well as core arts activities such as performing arts, visual arts, and written and published works.

We do have annual data on the arts, entertainment and recreation sector (representing only a portion of the overall cultural output of the province) which in 2011 contributed approximately $120 million worth of real gross domestic product (GDP)[1]. New Brunswick's arts, entertainment and recreation sector is one of the smallest in Canada adjusted for the size of the population. In 2011, the industry contributed $159 per person worth of real GDP which was higher than Newfoundland and Labrador but less than any other province (Table 2). The economic contribution of the industry has declined in recent years. Between 2002 and 2011, real GDP dropped by over 10 percent.

Nova Scotia also witnessed declines in arts, entertainment and recreation GDP over the period.

1 Expressed in chained, 2002 dollars.

Table 2 : REAL GDP CONTRIBUTION FROM THE ARTS, ENTERTAINMENT AND RECREATION SECTOR (2011)

	Real GDP $Millions	Per Capita	% Change (2002-2011)
Newfoundland and Labrador	$55.1	$107.77	1.8%
Prince Edward Island	36.3	253.15	253.15
Nova Scotia	253.15	174.96	-10.0%
New Brunswick	119.7	159.00	-10.2%
Quebec	2520	318.76	1.7%
Ontario	4,677.2	353.59	8.2%
Manitoba	396.3	321.01	14.1%
Saskatchewan	322.5	308.90	23.6%
Alberta	1,173.8	315.46	17.3%
British Columbia	1,686.5	372.32	7.7%

Source: Statistics Canada CANSIM Table 379-0025.

1.4 ARTS AND CULTURE OCCUPATION EMPLOYMENT TRENDS

Industry employment in the arts, entertainment and recreation (NAICS 71) sector is not the same as occupational employment. Industry employment includes all workers – not just those in artistic or cultural occupations (i.e. secretaries, accountants, etc.). Occupational employment looks at those people who are employed in artistic and cultural occupations regardless of the industry (i.e. a photographer or writer working in the manufacturing industry).

In 2011 there were an estimated 6,600 people working in arts, culture, recreation and sport occupations across New Brunswick or 188 per 10,000 in the overall New Brunswick workforce. Only Newfoundland and Labrador has a lower intensity of people employed in these occupations. New Brunswick has 44 percent fewer people working in these occupations compared to the national average. Ontario, Quebec and British Columbia have the highest intensity of people working in arts, culture, recreation and sport occupations. Since 2002, total employment in Art, Culture, Recreation and Sport has stagnated while it has grown by 32 percent across Canada.

Table 3 : EMPLOYMENT IN ART, CULTURE, RECREATION AND SPORT OCCUPATIONS

	2011 Employment	Per 10,000 in the Workforce	% Change in Total Employment 2002-2011
Canada	575,600	333	32%
Newfoundland and Labrador	4,200	186	2%
Prince Edward Island	1,900	264	46%
Nova Scotia	12,800	283	27%
New Brunswick	6,600	188	0%
Quebec	150,400	380	32%
Ontario	246,900	367	35%
Manitoba	15,500	248	27%
Saskatchewan	10,000	190	9%
Alberta	47,700	228	26%

Source: Statistics Canada. Table 282-0010.

1.5 DETAILED ARTS AND CULTURE OCCUPATIONAL EMPLOYMENT STATISTICS

A more comprehensive review of occupational and industry data on the arts and culture sector in New Brunswick comes from the Census which is taken every five years. The most recent Census was completed in 2011 and detailed industry and occupational data will not be available until early in 2013. However, the 2006 Census provides a good profile of the scope of the industry in New Brunswick and how it compares to other jurisdictions.

From an occupational perspective, the arts and culture industry includes a range of activities including: librarians and archivists, writers, performing artists, photographers, graphic designers, broadcast technicians, artisans and craftpersons (Table 4 below contains the full list).

Occupational employment differs significantly from industry employment because arts and culture occupations are found in a wide variety of industries and there are non-arts and cultural occupations (i.e. secretaries, accountants, etc.) in the arts, entertainment and recreation sector.

In 2006, there were 7,575 persons employed in arts and cultural occupations across New Brunswick (again these workers are heavily concentrated in the arts, entertainment and recreation but there are several thousand in other industries such as professional services, information technology, etc.

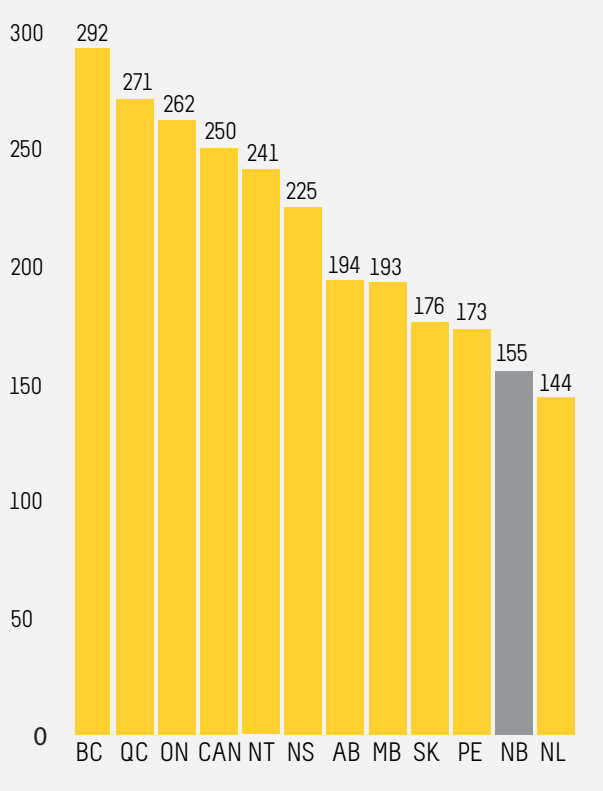
At the time of the Census, New Brunswick had the second lowest concentration of arts and cultural workers of all the provinces across Canada (Figure 1).

As shown in Table 4 below, New Brunswick has a higher concentration of workers in relatively few occupational categories compared to the rest of Canada. The New Brunswick workforce represents close to 2.3 percent of national employment. Any percentage above that means New Brunswick has a higher relative concentration and any lower means a lower concentration.

New Brunswick has a higher share of archivists, library managers, library assistants, journalists, announcers and broadcasters, and artisans and craftpersons. The province has a much lower share in occupational areas such as graphic arts technicians (only 0.6 percent of national employment), actors (0.6 percent), creative and performing artists (one percent) and editors (0.8 percent), among others.

Figure 1 :

ARTS AND CULTURE EMPLOYMENT PER 10,000 IN THE OVERALL WORKPLACE



Source: Statistics Canada 2006 Census

Table 4 : ARTS & CULTURAL EMPLOYMENT: DETAILED OCCUPATIONS (2006)

Italicized occupations are at or above national average employment level

Occupational Group	1996	2006	% Change (96-06)	% of national employment
Arts & cultural management				
A341 Library, archive, museum & art gallery managers	130	110	-15%	3.0%
A342 Managers in publishing & performing arts	165	80	-52%	0.8%
B551 Library clerks	255	115	-55%	1.0%
F0 Professional occupations in art & culture	2,605	2,990	15%	1.4%
F01 Librarians, archivists, conservators & curators	305	280	-8%	1.7%
F011 Librarians	240	200	17%	1.7%
F012 Conservators & curators	25	20	-20%	1.1%
F013 Archivists	***40***	***55***	***38%***	***2.3%***
F02 Writing, translating & public relations professionals	1,400	1,720	23%	1.6%
F021 Writers	255	430	23%	1.6%
F022 Editors	120	135	13%	0.8%
F023 Journalists	***280***	***300***	***7%***	***2.3%***
F024 Professional occupations in public relations& communications	445	585	31%	1.6%
F025 Translators, terminologists & interpreters	290	265	-9%	1.6%
F03 Creative & performing arts	900	990	10%	1.0%
F031 Producers, directors, choreographers & related occupations	200	155	-23%	0.7%
F032 Conductors, composers & arrangers	10	30	200%	1.3%
F033 Musicians & singers	475	420	-12%	1.2%
F034 Dancers	65	70	8%	1.4%
F035 Actors	40	60	50%	0.6%
F036 Painters, sculptors & other visual artists	105	255	143%	1.4%
F1 Technical occupations in art, culture, recreation and sport	4,420	4,340	-2%	1.5%
F11 Technical occupations in libraries, archives, museums & galleries	***350***	***565***	***-13%***	***2.7%***
F111 Library &archive technicians & assistants	***450***	***390***	***-13%***	***2.5%***
F112 Technical occupations related to museums & galleries	***205***	***175***	***-15%***	***3.1%***
F12 Photographers, graphic arts technicians & related*	725	535	-26%	1.0%
F121 Photographers	210	180	-14%	1.3%
F122 Film & video camera operators	70	85	21%	1.8%
F123 Graphic arts technicians	175	45	-74%	0.6%
F124 Broadcast technicians	80	45	-44%	1.7%
F125 Audio & video recording technicians	105	60	-43%	0.6%
F126 Other technical occupations*	50	65	30%	0.6%
F127 Support & assisting occupations*	30	50	67%	0.7%
F13 Announcers & other performer	260	215	-17%	1.8&
F131 Announcers & other broadcasters	***250***	***210***	***-16%***	***2.5%***
F132 Other performers	10	-	-100%	0.0%
F14 Creative designers & craftpersons	1,170	1,330	14%	1.4%
F141 Graphic designers & illustrating artists	410	675	75%	1.0%
F142 Interior designers	80	140	75%	1.0%
F143 Theatre, fashion, exhibit & other creative designers	50	55	10%	0.5%
F144 Artisans & craftpersons	***320***	***465***	***-25%***	***2.6%***
F145 Patternmakers, textile, leather & fur products	10	-	-100%	0.0%

Source: Statistics Canada

1.6 ARTS AND CULTURE OCCUPATIONS: FULL TIME VERSUS ART TIME WORK

Statistics Canada segments out workers as either full time/full year or part time/part year. As shown in Table 5, at the time of the 2006 Census just under half of all workers in New Brunswick worked full time/full year. The rest worked either part time or part of the year. This is a slightly lower percentage compared to Canada as a whole.
Among the artistic and cultural occupations where data was available from the Census, there is a wide variation in full time versus part time or part year work. Librarians, translators and photographers/graphic designers had a similar full time/full year work pattern as the national average. However, among those who are classified as artisans and craftspersons, only 20 percent indicated they were working at this occupation full time and full year – well below the national average.

Table 5 : ARTS & CULTURAL EMPLOYMENT: PERCENTAGE WORKING FULL TIME/FULL YEAR (2006 CENSUS)*

All Occupations	Canada	New Brunswick
	51%	48%
Arts & Cultural Occupations		
A34 Managers in art, culture, recreation and sport	67%	63%
F0 Professional occupations in art and culture	44%	48%
F01 Librarians, archivists, conservators and curators	57%	66%
F011 Librarians	57%	61%
F02 Writing, translating, and public relations professionals	54%	57%
F023 Journalists	58%	49%
F024 Professional occupations in public relations and communications	60%	61%
F025 Translators, terminologists and interpreters	44%	53%
F03 Creative and performing artists	30%	28%
F033 Musicians and singers	18%	17%
F1 Technical occupations in art, culture, recreation and sport	35%	28%
F11 Technical occupations in libraries, archives, museums and art galleries	37%	29%
F111 Library and archive technicians and assistants	42%	39%
F12 Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, braodcasting and the performing arts	44%	47%
F13 Announcers and other performers	40%	36%
F14 Creative designers and craftspersons	54%	40%
F141 Graphic deisgners and illustrators	59%	58%
F144 Artisans and craftspersons	41%	20%

*Some occupations data is supressed. Source: Statistics Canada

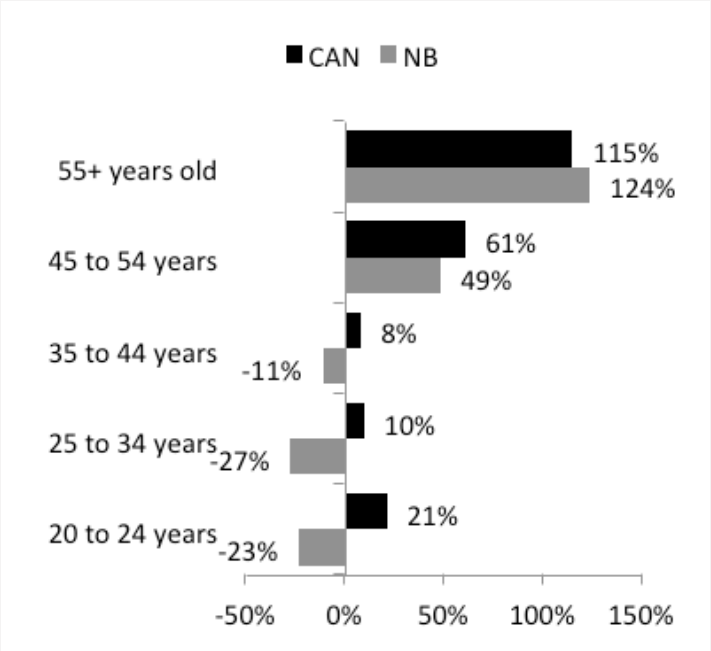
1.7 ARTS AND CULTURE WORKERS: BY AGE GROUP

New Brunswick's arts and cultural workforce is getting older. In 2006, 18 percent of workers in professional and technical arts and cultural occupations were between the ages of 25 and 34 compared to 24 percent across Canada. Seventeen percent were above the age of 55 in New Brunswick compared to 14 percent across the country.

Canada is witnessing growth among the younger cohort of artists and cultural workers while New Brunswick is not. As shown in Figure 2, the number of workers in arts and cultural occupations aged 45 and older is increasing at a relatively similar rate in New Brunswick and Canada as a whole (between 1996 and 2006). However, among the three younger cohorts the number of workers in New Brunswick is in an outright decline while continuing to grow across Canada.

While we do not have data on migration rates among artists and cultural workers, it is likely many artists and cultural workers are leaving the province to find work.

Figure 2 : PERCENTAGE CHANGE IN THE NUMBER OF ARTS & CULTURAL WORKERS BY AGE GROUP (1996-2006)



Includes both professional and technical occupations in art and culture. Source: Statistics Canada.

1.8 DETAILED ARTS AND CULTURE OCCUPATIONAL EMPLOYMENT BY REGION WITHIN NEW BRUNSWICK

Fom the Census, detailed regional profiles can be developed. Based on the list of occupations as found in Table 5 above, in 2006 there were 1,830 persons working in the arts and cultural occupations in the Greater Moncton region (the Moncton CMA), 1,540 working in Fredericton (CA) and 1,205 working in Saint John (CMA).

Adjusted for the size of the community (as measured by total employment), Fredericton had the highest concentration of arts and culture workers – 21 percent more than Moncton and 68 percent more than Saint John. How New Brunswick communities rank among Canada's 146 small and large urban centres is found in Table 6.

Table 6 : ARTS & CULTURAL EMPLOYMENT INTENSITY (2006)

Among Canada's CA and CMA Urban Centres

CMA/CA Region:	Employment per 10,000 overall in the Labour Force	Rank:
Ottawa – Gatineau	374.9	1
Vancouver	356.9	2
Montréal	355.2	3
Toronto	338.5	5
Whitehorse	330.4	7
Stratford	317.2	8
Halifax	302.9	9
Fredericton	253.2	18
Calgary	248.1	19
St. John's	228.7	25
Moncton	208.6	41
Edmundston	154.9	72
Saint John	151.1	80
Miramichi	113.1	115
Bathurst	88.4	134
Campbellton	46.5	145
Dolbeau-Mistassini	44.2	146

Source: Statistics Canada 2006 Census.

1.9 SECTOR WAGE RATES

The arts, entertainment and recreation sector is not among the highest paying in New Brunswick[2]. In 2011, the average weekly wage for this sector in New Brunswick was just under $524 – or an annualized employment income of $27,248. As will be shown in Appendix 2 below, many artists work in other industries in order to supplement the revenue they generate from their artistic or creative endeavour.

Table 7 : AVERAGE WEEKLY WAGE COMPARISON (2011)

Arts, entertainment and recreation sector [71]

	Avg. Weekly Wage	% Change 2006-2011	As a % of Overall Avg. Provincial Wage
Canada	$ 551.22	24%	-37%
Newfoundland and Labrador	489.11	41%	-44%
Nova Scotia	505.11	43%	-34%
New Brunswick	523.95	38%	-34%
Quebec	543.86	21%	-32%
Ontario	568.47	20%	-36%
Manitoba	568.28	38%	-30%
Saskatchewan	505.16	31%	-42%
Alberta	560.06	40%	-46%

[2]Again, notice the difference between industry and occupation. Certain occupations such as graphic designers would earn above average wages.

The best data on specific arts and cultural occupational wages comes from the Census. The data from the 2011 Census will be published in 2013. Table 8 below shows the median annual wage data for selected arts and cultural occupations split by those who worked full time/full year and those who worked either part time or part year. The wage spread between New Brunswick and Canada is also shown in the table. For all occupations, the average New Brunswicker who worked full time and full year in 2005 earned 16 percent less than the average Canadian. The wage spread among arts and cultural occupations varies significantly.

Full time journalists in New Brunswick earned about the same as journalists across Canada. Full time artisans and craftpersons earned 27 percent less than their counterparts across Canada.

For those who work in arts and cultural occupations on a part time basis, the wage spread with the rest of Canada is much more pronounced. For all professional occupations in arts and culture, the average New Brunswick worker earned 40 percent less in 2005. For technical occupations in arts, culture, recreation and sport, the spread was 28 percent.

Table 8 : ANNUAL WAGE COMPARISON - ARTS & CULTURAL OCCUPATIONS (2006)

	Full Time/Full Year		Part Time or Part Year	
	Median Wage	Compared to CDN Median Wage	Median Wage	Compared to CDN Median Wage
All Occupations	$34,763	-16%	$10,772	-7%
Arts and Cultural Occupations				
A34 Managers in art, culture, recreation and sport	$41,642	-18%	$10,273	-40%
F0 Professional occupations in art and culture	41,394	-6%	7,858	-31%
F01 Librarians, archivists, conservators and curators	41,662	-19%	10,209	-46%
F011 Librarians	45,876	-14%	11,307	-44%
F02 Writing, translating and public relations professionals	43,792	-9%	11,224	-29%
F023 Journalists	48,293	0%	18,462	1%
F024 Professional occupations in public relations and communications	40,257	-21%	7,851	-58%
F025 Translators, terminologists and interpreters	47,135	0%	8,797	-44%
F03 Creative and performing artists	31,898	13%	6,664	-24%
F033 Musicians and singers	35,991	n/a	5,928	-27%
F1 Technical occupations in art, culture, recreation & sport	30,572	-8%	5,548	-28%
F11 Technical occupations in libraries, archives, museums and art galleries	32,515	-13%	8,693	-33%
F111 Library and archive technicians and assistants	31,398	-18%	13,478	-21%
F12 Photographers, graphic arts technicians and technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts		-1%	14,576	-7%
F13 Announcers and other performers	39,046	11%	5,609	-45%
F14 Creative designers and craftspersons	28,611	-14%	7,864	-38%
F141 Graphic designers and illustrators	33,671	-7%	14,556	-3%
F144 Artisans and craftspersons	13,995	-27%	5,977	-12%

Source: Statistics Canada 2006 Census.

Note: On the Census, occupational data reflects the primary occupation of individuals. There are many more New Brunswickers, for example, that would have been classified in the Census in other occupations (i.e. teaching, etc.) that are also artisans and craftspersons on a part-time basis. The table above shows those that indicated their primary occupation was in the arts and culture sector.

APPENDIX 2: FINDINGS FROM THE ARTIST AND ORGANIZATIONAL SURVEYS

2.1 SURVEY FINDINGS: A PROFILE OF NEW BRUNSWICK'S ARTS & CULTURE WORKFORCE

To support this research project, a survey was sent to New Brunswick artists and cultural workers to garner current data on workforce characteristics such as occupation, income, training, where products/services are sold (local vs. export markets), etc. The survey also asked a broader set of questions covering issues such as entrepreneurial considerations including business planning, marketing, financing, etc. The survey was sent to ArtsLinkNB members and promoted through arts and cultural institutions.

2.1.1 PROFILE OF RESPONDENTS

There were 370 wholly or substantially completed surveys. Nearly 53 percent of respondents are ArtsLinkNB members. Over half of all respondents indicated they are visual artists. The second largest category of respondents by artistic focus are craftpersons – with 24 percent. Eighty-four (18 percent) are performing artists. Table 9 shows the breakdown of respondents by artistic focus. Respondents were able to select more than one category of focus.

Table 8 : BREAKDOWN OF INDIVIDUAL SURVEY RESPONDENTS BY ARTISTIC FOCUS

Multiple responses allowed.

Category:	# of Respondents	# of Total
Visual artist	190	51%
Craftsperson	87	24%
Performing artist (dance, theatre or music)	84	23%
Writer	66	18%
Filmmaker	11	3%
Digital media artist	18	5%
Graphic designer	17	5%
Multidisciplinary artist	62	17%
Other	35	9%

Forty-one percent of respondents are full-time artist/craftpersons. Another 33 percent are part-time artist/craftpersons and the remainder are involved in teaching related subjects. Of the 370 respondents, more than half (53 percent) are self-employed, while 11 percent work for an arts organization, nine percent work for a non-arts organization and a quarter are employed in a teaching capacity. Many of those involved in teaching also practice art on the side.

For 39 percent of respondents, income from their artistic/cultural endeavour was their primary source of income in 2011 while 33 percent said it was a secondary source of income. Twenty-seven percent (mostly among the educators) said it was a limited source or did not provide any income in 2011.

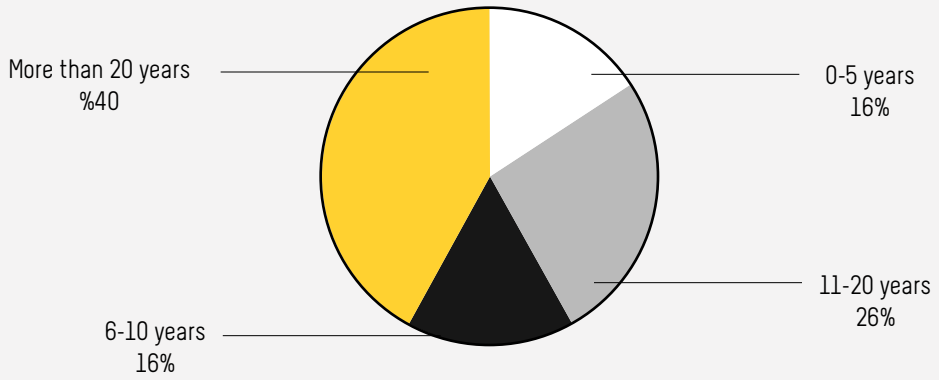
The artists/cultural workers were asked to indicate if they receive income from any source other than their artistic/cultural endeavours. Just over half (52 percent) did receive income from other sources as outlined in Table 10 below.

There were over 40 different occupational groups ranging from entertainment to religion. The top source of income was employment/work in the education/training sector. Thirty-nine respondents generated income from that activity in 2011. The second largest category of non-artistic endeavour income was retirement/pension income. Information technology/graphic design/marketing was the third most mentioned occupational area followed by other professional services such as architectural services.

Table 10 : BREAKDOWN OF INDIVIDUAL SURVEY RESPONDENTS BY SOURCE OF INCOME

Source of Income:	# of Respondents:
Education	39
Retired/pension	38
IT/graphic design/marketing	19
Other professional services	18
Food services	12
Customer service/admin	12
Retail	10

Figure 3 : YEARS AS A PRACTICING ARTIST/CULTURAL WORKER



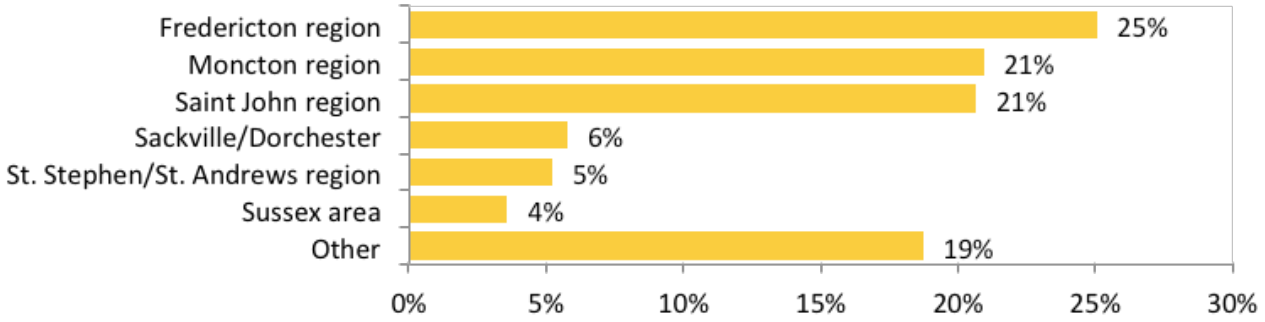
Among workers who are not working full time in their artistic/cultural endeavours, eighty-three percent said they would prefer to work full time pursuing their artistic/cultural endeavours if it were financially feasible. The survey asked artists/cultural workers to indicate how many years they have been a practicing artist or cultural worker. More than two-thirds of the respondents (68 percent) have been practicing their artistic/cultural endeavour for more than a decade.

As shown in Table 11 below, the Fredericton region (including outlying rural communities such as Douglas and Gagetown) accounted for one fourth of the respondents (25 percent). The Moncton and Saint John regions (including the rural periphery) accounted for 21 percent each. The Moncton region included places such as Shediac and Hillsborough but not Sackville/Dorchester which, adjusted for population size, had a relatively high percentage of respondents (21 total respondents from Sackville/Dorchester.

Approximately 15 percent of respondents lived in Northern New Brunswick and the rest lived in places such as Woodstock and Cambridge-Narrows.

Two-thirds of the respondents lived in urban areas (e.g. Dieppe, Rothesay and Lincoln are considered inside the Moncton, Saint John and Fredericton urban areas).

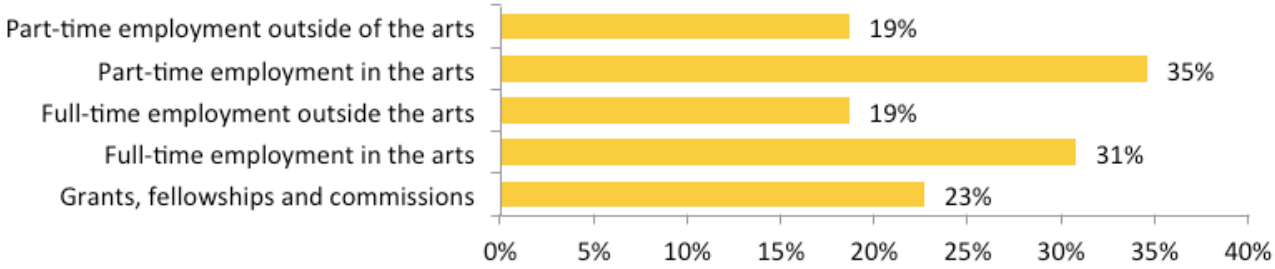
Figure 4 : BREAKDOWN OF INDIVIDUAL SURVEY RESPONDENTS BY GEOGRAPHIC REGION



2.1.2 SOURCES OF INCOME/REVENUE

Survey respondents were asked to indicate from what sources they received income in 2011. Two-thirds received income from employment in the arts (66 percent) – this includes self-employment – and nearly a quarter (23 percent) received some form of grant, fellowship or commission in 2011. Nearly 40 percent received employment income from a non-artistic endeavour in 2011.

Figure 5 : SOURCES OF INCOME IN 2011



The artists/cultural workers were asked to specifically identify the sources of artistic/cultural product/service revenue (over the past 12 months). The majority of respondents generated product sales in 2012 (52 percent). The second most prominent source of income in 2011 was the provincial government which provided financial support to 63 of the respondents. Private grants/sponsorships were received by 29 respondents and 21 received funding from the Canada Council for the Arts.

Table 11 : SOURCES OF ARTISTIC/CULTURAL PRODUCT REVENUE IN 2011

	# of Respondents	% of Total
Arts/cultural product sales	191	52%
Provincial government grants	63	17%
Private grants/sponsorships	29	8%
Canada Council for the Arts	21	6%
Municipal government grants	18	5%
Federal government grants (not including the Canada Council for the Arts)	16	4%

Respondents were asked if they were eligible, have applied for or received funding from the Canada Council for the Arts. A little over 35 percent said they were eligible for CCA funding but another 58 percent didn't know if they are eligible or not (6.5 percent said they were not eligible). Just over a quarter of the artists/cultural workers have applied to the CCA for funding (97 in total) and 26 have received funding at some point in their career (seven percent of the total).

Respondents were asked to comment on why they haven't received CCA funding or why they haven't considered applying. A number applied once, were rejected and never reapplied. Several others felt the process was too complicated.

Table 12 : ACCESSING CANADA COUNCIL FOR THE ARTS FUNDING

	Yes	No	Don't Know
Eligible for CCA funding	131	24	215
Applied for CCA funding	97	245	
Received CCA funding	26		

The majority of respondents to the survey earned less than $40,000 in total income during 2011 (68 percent). Ten percent earned more than $70,000 in 2011 which was in line with the average for the province as a whole. As shown in Appendix 1, overall average wage levels for the arts and culture sector are below average.

Table 13 : SURVEY RESPONDENTS BY TOTAL INCOME LEVEL (2011)

	# of Respondents	% of Total
Under $20,000	114	33.5%
$20,000 - $39,999	117	34.4%
$40,000 - $54,999	42	12.4%
$55,000 - $69,999	33	9.7%
$70,000 - $89,999	16	4.7%
$90,000 and up 18	18	5.3%
Totals	340	

Only 174 respondents indicated they received at least some income from the creation of artistic/cultural products in 2011 (several said they did not want to share and others left the answer blank). Of the 174 respondents, less than one-third (28 percent) earned all of their income from artistic/cultural endeavours. A majority earned less than 50 percent from their artistic/cultural endeavours.

Table 14 : PERCENTAGE OF INCOME FROM ARTISTIC ENDEAVOURS (2011)

	# of Respondents	% of Total
Under 25%	77	44%
25%-49%	17	10%
50%-74%	15	9%
75%-99%	17	10%
100% of income	48	28%
Totals	174	100%

Only 35 of the 370 survey respondents indicated they have collected Employment Insurance in the last 24 months. After removing those on retirement/pension income or not receiving any income in 2011, the percentage of survey respondents collecting EI at some point during the year is still less than 13 percent (compared to 20 percent of the population as a whole).

2.1.3 TIME SPENT ON ARTISTIC ENDEAVOURS

Ninety-four percent of respondents spent at least some time per week working on the creation of new art/cultural products (346 out of 370 respondents). Those not involved in the direct creation were supporting it in some way (teaching, management, etc.). Table 15 shows the breakdown of hours spent per week on the creation of new art/cultural products. Only a little more than one out of every four (27 percent) spend 40 hours per week or more working on their art. Thirty-seven percent spend between 10 and 24/hours per week. Forty of the respondents work on their art less than an average of 10 hours per week.

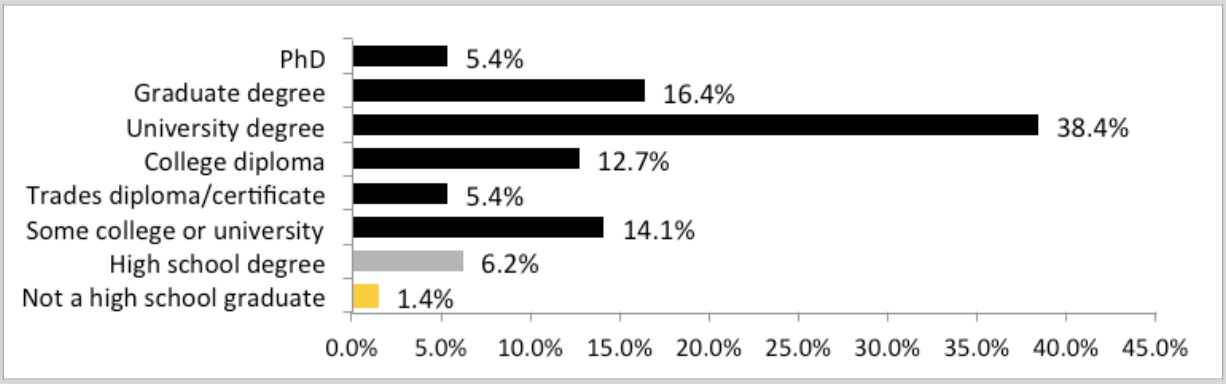
Table 15 : HOURS SPENT PER WEEK ON ARTISTIC/CULTURAL ENDEAVOURS*

	# of Respondents	% of Total
40 hours a week or more	93	27%
Between 25 and 39 hours/week	85	25%
Between 10 and 24 hours/week	128	37%
Less than 10 hours/week	40	12%
Totals	174	100%

*Time spent on the creation of arts/cultural products. Not including teaching, management, etc.

2.1.4 EDUCATIONAL PROFILE

The respondents to the artist/cultural worker survey are more educated than the population as a whole. Nearly 22 percent of the respondents indicated their highest level of education was a graduate degree (including Phd) – more than four times higher than the population as a whole. Over 62 percent have at least a university degree – triple the overall provincial average.



2.1.5 AGE PROFILE OF RESPONDENTS

Survey respondent age levels roughly correlated with the population as a whole. Across the province 36 percent of the population is over the age of 55 (40 percent of the survey respondents were over the age of 55). New Brunswick is tied with Nova Scotia with the second oldest population in Canada among the 10 provinces (as measured by median age). This is also reflected in the age of New Brunswick's artists and cultural workers.

Table 16 : SURVEY RESPONDENTS BY AGE

	# of Respondents	% of Total
Under 25 years old	9	3%
25-35	73	21%
36-55	127	36%
55+	141	40%
Totals	350	

2.1.6 LOCATION OF ARTISTIC AND CULTURAL PRODUCT CREATION

The majority of New Brunswick artists (at least based on this survey) work on their artistic creation at home. A full 72 percent use a home studio for artistic creation. Seventeen percent use a professional studio outside the home and 14 percent rent studio space from a third party provider. A smaller amount (nine percent) indicated their art creation happens in other locations (e.g. actors)[3] .

Table 17 : LOCATION OF ART/CULTURAL PRODUCT CREATION (2011)*

	# of Respondents	% of Total*
Home Studio/Space	248	72%
Professional Studio/Space	59	17%
Rented Studio/Space	48	14%
Other	30	9%

*Out of the 346 who spent time creating art/cultural products in 2011.

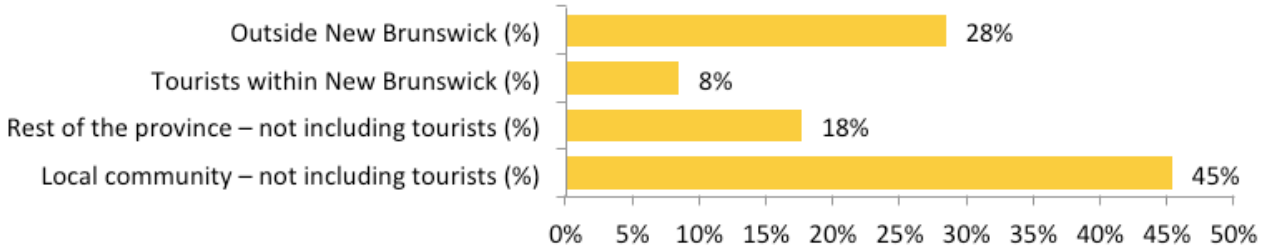
[3] The totals do not equal 100 percent as several people indicated they create both at home and at a location outside the home.

2.1.7 SALES, MARKETING & MARKETS

Respondents were asked if they have an agent or dealer that sells on their behalf. Of the 322 persons answering this question, 70 have an agent or dealer (22 percent) and the other 252 do not. Of the 70 that have an agent or dealer, Fredericton and Saint John were the locations most often cited. Twenty-four firms have an agent or dealer located outside New Brunswick. Out of the 370 survey respondents, 240 provided estimated data on the artistic/cultural product sales by geographic market. Of those 240, the average artist generated 45 percent of total revenue from the local community (not including tourists) and another 18 percent from sales into the rest of New Brunswick.

The survey asked respondents to estimate a breakdown of revenue from outside New Brunswick from a) tourists visiting New Brunswick and b) product sales outside the province. Some of the respondents could not breakout tourist revenue but 91 artists indicated at least some revenue from tourists travelling in New Brunswick (this equates to eight percent for the average artist). A full two-thirds of the artists/cultural workers who provided geographic market data indicated some sales outside the province. For the average artist, 28 percent of revenue comes from clients outside New Brunswick. A total of 61 artists generate 50 percent or more of their revenue outside New Brunswick.

Figure 7 : AVERAGE ARTISTIC/CULTURAL PRODUCT REVENUE BREAKDOWN BY GEOGRAPHIC MARKET (2011)

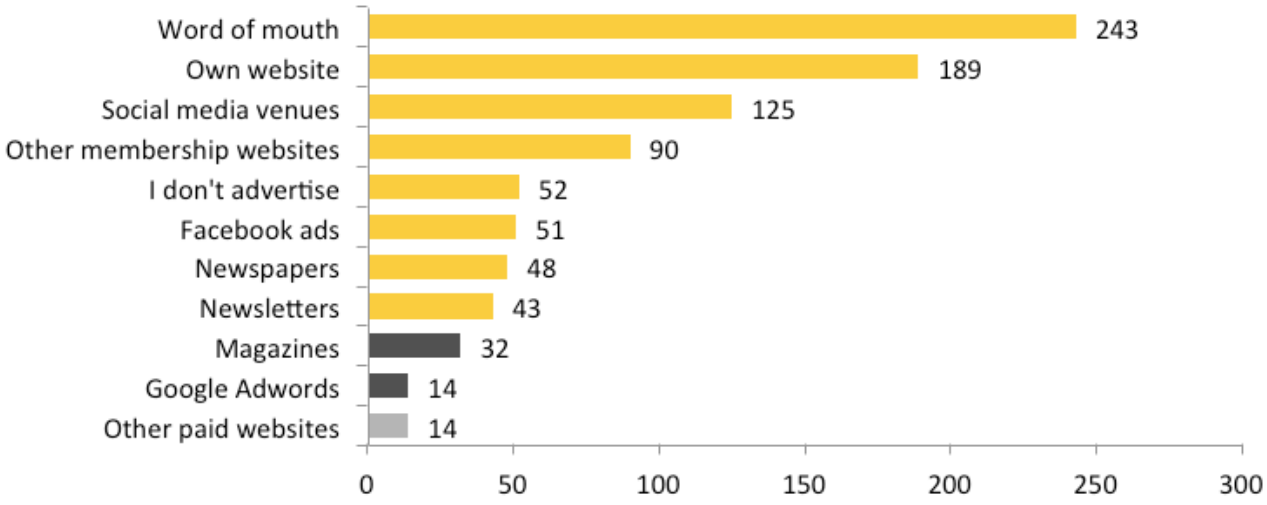


The use of the Internet to generate sales is growing in importance among New Brunswick artists. The survey asked respondents how many have a website to promote themselves and their products. Nearly 56 percent of respondents have a personal website. Of those with websites, 75 generate at least some of their revenue directly through their website (a number of others use third party websites to generate sales).
Of the 75, five artists sell exclusively online and another 10 generate at least 40 percent of their revenue online. Thirty-eight of the artists selling online generate 10 percent or less of their total revenue online.

The survey respondents were asked to indicate where they advertise and promote their artistic/cultural products. Other than word-of-mouth, the artists' own websites are the most used vehicle for promotion followed by social media such as Facebook and Twitter. Ninety artists use other membership-based websites to promote themselves and their products.

Fifty-one of the artists use paid advertising on Facebook (in addition to the free Facebook page). This is more than use the traditional sales channels including newspapers, newsletters and magazines. The vast majority haven't advanced to more sophisticated targeting such as Google Adwords (only 14 artists used this approach in 2011).

Figure 5 : SOURCES OF INCOME IN 2011



When asked to rate the importance of various ways of finding their audience/customers/ markets, survey respondents believe word of mouth and exhibitions, showings or showcases are the two most important marketing channels. General advertising was considered the least important marketing channel (Table 18).

Table 18 : IMPORTANCE OF MARKETING CHANNELS

(% of total responses)

	Important to very important	Less to not at all important
Word of mouth (business and personal networks)	96%	4%
Exhibitions, showings or showcases	84%	16%
Social media (my own website, newsletter or blog, Twitter or Facebook)	78%	22%
Other websites (including social media, blogs, e-lists, Twitter and Facebook)	63%	41%
Advertising	58%	42%

2.1.8 TOP AREAS OF FOCUS/CONCERN FOR NEW BRUNSWICK ARTISTS/CULTURAL WORKERS

New Brunswick artists and cultural workers were asked to indicate the importance of a number of specific areas of focus. Artistic and creative development was considered to be the most important activity to focus on with 93 percent of respondents suggesting it was important to very important. The respondents also indicated the need to focus on sales and market development. Funding was less important than sales and marketing. Personal goals such as developing business goals and managing finances were not quite as important. Interestingly, among this group of respondents, competition from imports does not seem to be much of a concern.

Table 19 : AREAS OF FOCUS/CONCERN

(% of total responses)

	Important to very important	Less to not at all important
Artistic/creative development	93%	7%
Finding my audience, my customers or my markets	88%	12%
Promoting my work in New Brunswick	85%	15%
Promoting my work outside New Brunswick	81%	19%
Making sales (e.g. setting prices and making pitches to buyers)	76%	24%
Finding sources of funds	75%	25%
Planning and managing finances	72%	28%
Developing business goals and plans	66%	34%
Geographic location or size of community	54%	46%
Competition from imports	30%	70%

Noted is the apparent lack of concern with respect to competition from imports. This may vary from discipline to discipline. For example, visual artists may not feel this competition as strongly as performing artists, who face ongoing and stiff competition from organizations outside New Brunswick.

For example, few New Brunswickers would think of movies as outside competition for local film-makers, since movies are an omnipresent entertainment form and have been for many years. But those involved in dance or theater, for example, would feel this competitive factor more keenly.

2.1.9 MANAGING CAREER DEVELOPMENT

One of the goals of the survey was to determine the activities New Brunswick artists/cultural workers were involved in to help them develop their careers. Figure 9 shows the number of respondents by category. Nearly 200 of the respondents belong to some form of professional association or union. About half of the respondents attend workshops or have personal networks they are involved with. Fewer use formal business networks (around 22 percent) and only 17 percent they have a 'mentor' for advice. Only around 11 percent take college or university courses for career development.

Figure 9 : RESOURCES USED FOR CAREER DEVELOPMENT (# OF RESPONSES)

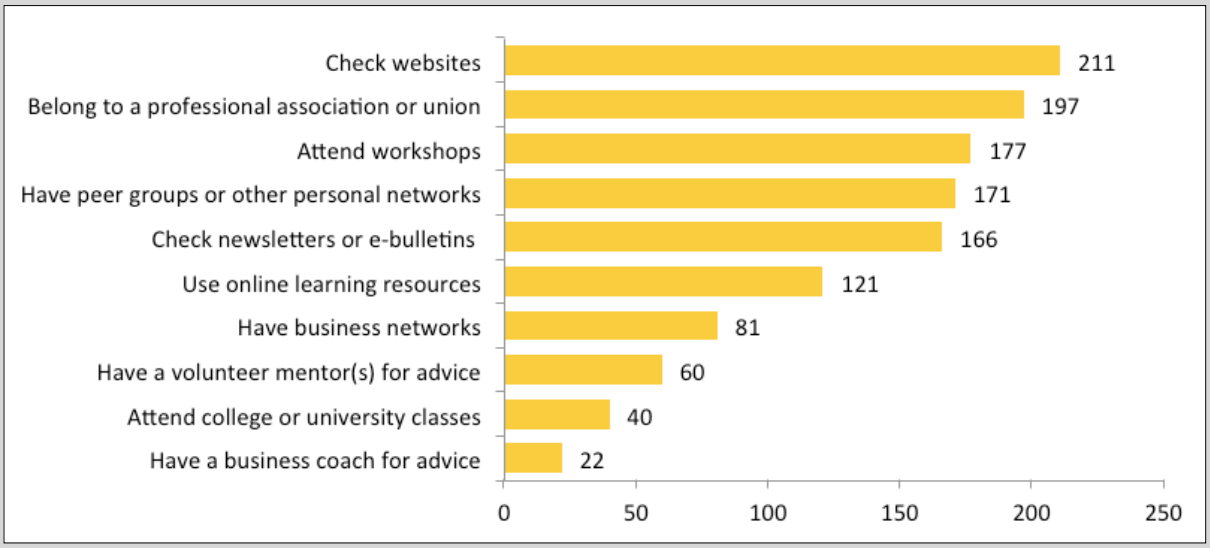
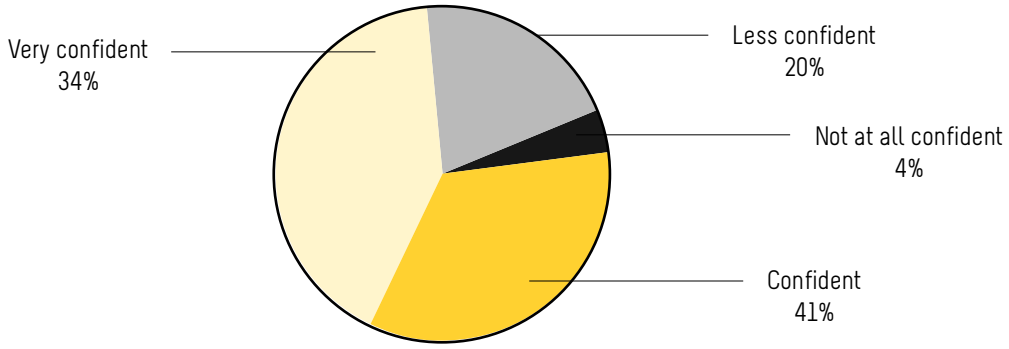


Figure 10 : CONFIDENCE IN ABILITY TO DEVELOP SKILLS AS AN ARTIST IN NEW BRUNSWICK



Following this, respondents were asked to indicate how confident they were in their ability to develop skills as an artist in New Brunswick. Three-fourths of the respondents said they were confident or very confident they could develop their artistic skills in New Brunswick.

Respondents were also asked to indicate the resources they access to help them develop skills as an artist (this was an open ended question). Professional associations including ArtsLinkNB were mentioned by about one-third of the respondents. Economic development agencies such as Enterprise Saint John were mentioned by several artists.

Respondents were also asked about their capacity to manage their careers. Over 80 percent said they were confident or very confident in their ability to set goals and plan ahead. The respondents were mostly confident of their ability to manage personal finances and in their leadership skills.

They were slightly less confident in their ability to promote and market their work with 42 percent saying they had less confidence or no confidence. With respect to skills associated to developing and making sales, over half of the respondents said they had less confidence or no confidence in their abilities in this area.

Table 20 : IMPORTANCE OF SKILLS DEVELOPMENT

	Not at all confident	Less confident	Confident	Very confident
Leading and managing people	5%	18%	44%	32%
Planning and managing finances	5%	23%	48%	23%
Managing my career (e.g. setting goals, planning ahead)	1%	18%	49%	32%
Promoting and marketing my work	6%	36%	40%	18%
Developing and making sales (e.g. negotiating, pitching to customers)	10%	43%	35%	12%
Social media and social networking	9%	29%	39%	22%
Technical skills required for business or sales	8%	34%	40%	17%

The respondents were then asked to indicate how much importance they place on these same skills for their career development in the future. Marketing and promoting art was considered to be the most important skill needing to be developed by 93 percent of the respondents. Expanding a peer network, developing and making sales and goal setting were also considered very important. Financial skills and leadership skills were considered less important.

Table 21 : LOCATION OF ART/CULTURAL PRODUCT CREATION (2011)*

	Important to very important	Less to not at all important
Marketing and promoting my work	93%	7%
Expanding my peer network	85%	15%
Developing and making sales	84%	16%
Managing my career (e.g. setting goals)	81%	19%
Social media and networking	79%	21%
Financial skills (e.g. planning and managing budgets and cash flow, raising funds, making proposals)	75%	25%
Technical skills for business and marketing	73%	27%
Leadership skills (e.g. building a team, managing people)	50%	50%

2.1.10 TRAINING

Respondents were asked if they had taken any formal training in any of the career skills discussed above over the past three years. Less than two out of every five respondents have taken formal training (37 percent).

Of those who have taken training, the top source was university courses followed closely by an online learning course. Thirty-three said they had taken a course at an arts training facility and 32 received training at a local business or enterprise centre.

Table 22 : SOURCES OF ARTS-RELATED TRAINING (IN PREVIOUS THREE YEARS)

	# of Respondents
University courses	40
Online learning	37
Arts training facility	33
Local business or enterprise centre	32
Arts service organization	30
Government or agency workshops	23
Community college courses	17
Community arts council	8

2.1.11 BUSINESS SKILLS DEVELOPMENT

Persons taking the survey were asked to rate a number of business skill development topics from most important (1) to not at all important (4). Similar to the findings above, promotion, marketing and sales development are the most important business skills according to the respondents. Managing the business along with similar issues such as proposal writing and raising funds were considered important.

Table 23 : IMPORTANCE OF BUSINESS SKILLS DEVELOPMENT

	Most Important	Important	Somewhat important	Not important
Developing and making sales	52%	33%	9%	6%
Promotion and marketing	48%	39%	11%	2%
Managing my career	45%	37%	15%	3%
Managing my small business	37%	35%	16%	12%
Proposal writing	35%	32%	21%	12%
Raising funds	33%	32%	23%	11%
Using technology better	30%	47%	16%	7%
Budgeting and managing finances	29%	47%	16%	8%
Business planning and development	28%	42%	23%	7%
Mentorship	25%	29%	28%	18%
Leadership skills	21%	32%	29%	18%
Human resources (e.g. managing people)	10%	27%	34%	28%

The survey asked for more detail related to support, collaboration and mentorship. Again the main focus was on marketing and sales. Over 80 percent of respondents said that collaborating with other artists to build market demand for artistic and cultural products was either important or most important.

Table 24 : IMPORTANCE OF COLLABORATION AND MENTORSHIP

	Most Important	Important	Somewhat important	Not important
Business & entrepreneurship training and assistance	23%	42%	21%	14%
Collaborating with other artists to build market demand for artistic and cultural products	44%	37%	14%	5%
Marketing assistance for branding, advertising, and selling	39%	34%	19%	7%

Survey respondents were asked if there were specific programs or services they would like to see offered in New Brunswick. Over 190 respondents provided responses and the top can be grouped into four categories (in order of intensity):

- Programs that support grant/proposal writing skills
- Access to agents for market development
- General marketing/sales support
- Business development skills
- Access to mentors

2.1.12 BIGGEST CHALLENGES FACING NEW BRUNSWICK'S ARTS SECTOR

The final section of the survey sought input from the artists and cultural workers on any big challenges facing the New Brunswick arts sector as well as any other advice they had on how to strengthen the sector moving forward. There were 236 written responses with many well thought out and insightful comments. The most comments centered around three themes: 1) the importance of raising public interest within New Brunswick; 2) greater cooperation and 3) marketing/promotion outside New Brunswick. There were other issues raised such as access to financing, recognizing and promoting excellence and access to venues to display and promote local art.

●●●●●● *The importance of raising public interest within New Brunswick*

This was the most cited issue among the respondents. There is a clear sense among this group that the public and its main institutions are not particularly interested in arts and the culture sector more broadly. There was talk of limited attendance to local visual art shows and performing arts presentations. A number of people suggested that artists were not put in a similar class as other professionals.

●●●●●● *Greater cooperation*

The idea of better cooperation was the second most cited issue. There were comments related to artists themselves working more closely together but also of the lack of cooperation between the various artistic and cultural groups. Fostering better communication between French language and English language artists was a recurring theme.

●●●●●● *Marketing/promotion outside New Brunswick*

The third most cited issue was related to the marketing and promotion of New Brunswick artists outside New Brunswick. The lack of agents, joint promotion and the distance from high potential markets were three recurring themes. A number of artists expressed frustration but also said that they are not doing a good enough job of promoting themselves outside their community

2.2 SURVEY FINDINGS: PROFILE OF NEW BRUNSWICK'S ARTS & CULTURAL INSTITUTIONS

2.2.1 ORGANIZATION TYPE AND EMPLOYMENT

Of the 38 respondents to the survey, 13 organizations were associations, councils or federations focused on advancing a specific segment of the arts and culture industry in New Brunswick. Nine of the respondents were art galleries, five were performance venues and three were performing arts organizations. There were also three respondents from the education/training segment of the industry (Table 25).

Fredericton was the base for 14 of the organizations followed by Saint John and Moncton with seven each. The rest were located in Sackville, Edmundston and Bathurst.

The bulk of the organizations have fewer than 10 employees (28 out of the 38 respondents). There is one in the group that has more than 50 employees (Figure 11).

Figure 11 : BREAKDOWN OF ORGANIZATIONS BY EMPLOYMENT LEVEL

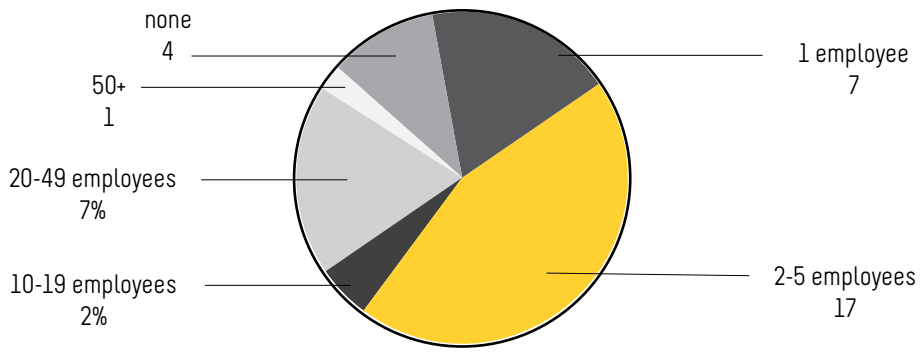


Table 25 : ARTS & CULTURAL ORGANIZATIONS – SURVEY RESPONDENTS BY TYPE

	# of Respondents
Association/Council	13
Gallery	9
Performance venue	5
Education/training organization	3
Performing arts organization	3
Festival	2
Publisher	2
Networking organization	1
Total	38

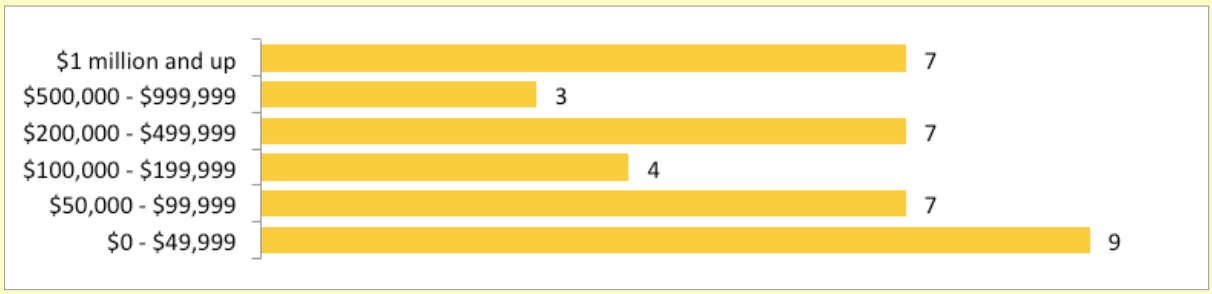
The arts and cultural organizations utilize a mix of full and part time employment. The average organization has a split of 60/40 full time and part time staff.

Seventy-four percent employ at least one part time staff (among those with staff – four organizations do not feature any paid staff).

2.2.2 ORGANIZATION BY REVENUE LEVEL

Ten of the organizations generate annual revenue of at least $500,000 but on the other end of the scale most of the associations/councils operate on relatively small budgets. Sixteen of the organizations generate less than $100,000 in revenue per year.

Figure 12 : ARTS & CULTURAL ORGANIZATIONS – SURVEY RESPONDENTS BY ANNUAL REVENUE LEVEL



The average organization generates 45 percent of its revenue from government sources. Table 26 shows the breakdown by sub-segment within the industry. Associations/councils/federations are majority funded by government while galleries (mostly private) are least reliant on government funding. Performance venues only generate an average of 27 percent of revenues directly from ticket sales/venue use.

Table 26 : ARTS & CULTURAL ORGANIZATIONS – REVENUE BREAKDOWN BY SOURCE*

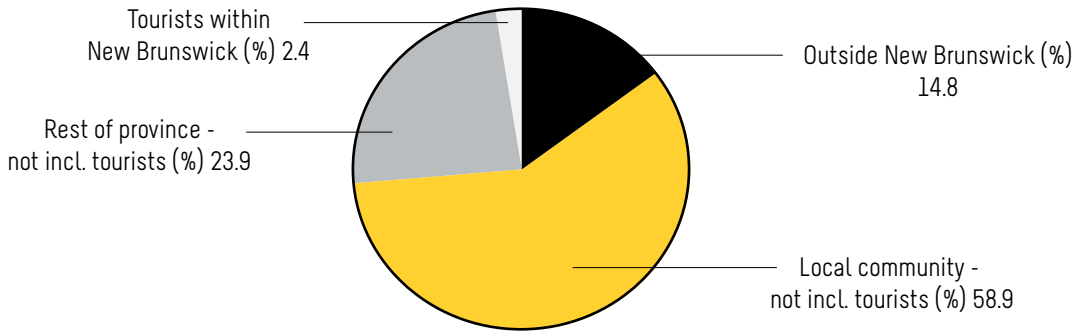
	All	Associations/ Councils	Galleries	Performance venues	Performing arts organizations & publishers
Direct from businesses	12%	7%	13%	13%	17%
Direct from private individuals (philanthropy)	9%	7%	14%	4%	11%
Product or service sales	22%	19%	31%	27%	13%
Government	45%	62%	18%	42%	53%
Endowment	2%	0%	6%	3%	0%
Foundations	3%	4%	0%	4%	2%
Other	7%	1%	17%	7%	4%

*Only 34 organizations provided a revenue breakdown by source.

Survey respondents were asked to provide more detail about their sources of grant/philanthropic revenue over the past 12 months. Twenty-seven of the 38 organizations received some funding from the provincial government in 2011 and 19 received funds from the federal government. The Canada Council for the Arts provided funding to 14 organizations. Twenty-one organizations received some form of private sector grants in the past 12 months.

The arts and cultural organizations were asked if they were eligible for Canada Council for the Arts funding. Twenty-one said they were eligible, nine said they were not and seven didn't know. Twenty had applied to the Canada Council for the Arts and 14 had received funding. The organizations were asked about the geographic sources of their revenue. Only 27 organizations provided this detail. The average revenue by source for all organizations is shown in Figure 13.

Figure 13 : SOURCES OF REVENUE BY GEOGRAPHIC MARKET



The galleries rely heavily on the local markets for more than two-thirds of their revenue. Only 13 percent of the average gallery sales are outside New Brunswick.

The performing arts organizations and publishers are more reliant on export revenue with the average organization generating 31 percent of sales outside the province. As would be expected, performance venues are reliant on the local community for more than 90 percent of revenue.

Only a little over three-fourths of the organizations have a website. Among those organizations that generate product or service revenue, very little is generated online. The performance venues are selling more online but only one provided an estimate of total revenue from online sources.

Three of the galleries sell online but only one generates at least 10 percent of revenue from online sales.

2.2.3 SALES, MARKETING AND MARKETS

The arts and cultural organizations are more traditional in their advertising compared to the individual artists that completed surveys. Over 70 percent still advertise in newspapers and over 60 percent advertise in newsletters. Social media are becoming important among this group with 26 out of the 38 organizations having some form of social media presence and 14 are buying Facebook advertising although only one out of the 38 is using Google Adwords.

Table 27 shows the breakdown of organizations by type of marketing channel.

Table 27 : ARTS & CULTURAL ORGANIZATIONS – MARKETING ACTIVITY

	# of Respondents	% of Total
Own website	34	89%
Word of mouth	33	87%
Newspapers	27	71%
Social media venues	26	68%
Newsletters	23	61%
Other membership websites	16	42%
Facebook ads	14	37%
Magazines	14	37%
Other (please specify)	8	21%
Other paid websites	5	13%
Google Adwords	1	3%
Don't advertise	1	3%

Over 80 percent of the organizations are involved in some form of joint marketing such as joint gallery promotion, co-presenting activities and guest artist collaborations. The arts and cultural organizations were asked if the local market (i.e. New Brunswick) for their artistic and/or cultural products been improving or weakening in recent years. Only 21 organizations responded to this question. Of those, 14 said the local market was improving and seven said it was weakening.

EXPORT MARKETS

Eleven of the 38 organizations are active in export markets including four of the associations/councils.

2.2.4 ORGANIZATIONAL SKILLS DEVELOPMENT

Respondents were asked to rank the importance of developing a number of organizational skills. Applying for government or philanthropic organizational funding was considered to be the most important organization skill needing to be developed. Collaborating with other organizations to build market demand for artistic and cultural products came in second with 30 out of 27 organizations rating this as either important or very important.

Table 25 : ARTS & CULTURAL ORGANIZATIONS – IMPORTANCE OF SKILLS DEVELOPMENT

	Most Important	Important	Somewhat important	Not important
Applying for government or philanthropic organizational funding	17	11	6	2
Collaborating with other organizations to build market demand for artistic and cultural products	13	17	6	1
Business & entrepreneurship training and assistance	7	18	6	5
Marketing assistance for branding, advertising, and selling	8	16	7	4
Employee training (customer service skills, etc.)	6	12	11	4

2.2.5 EMPLOYEE TRAINING

Eleven of the 38 organizations have a formal training program for employees.

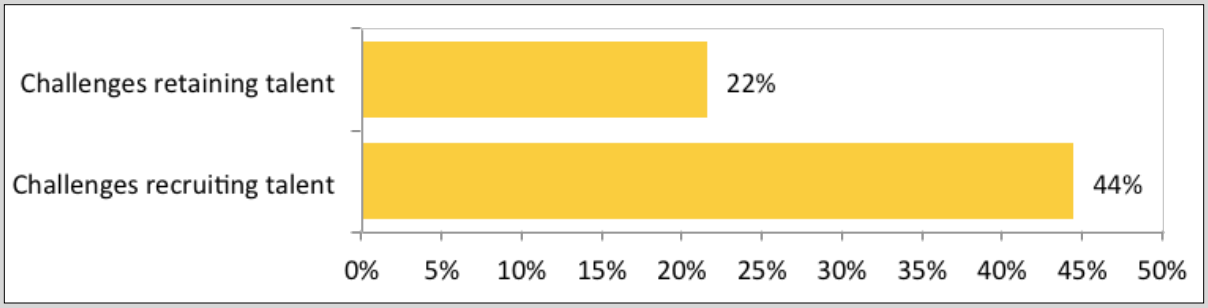
2.2.6 RECRUITMENT AND RETENTION OF STAFF

Like other employers in New Brunswick, arts and cultural organizations in the province have a harder time recruiting than retaining staff. Forty-four percent said they had difficulty recruiting qualified staff. The main reasons cited were uncompetitive salary levels and the small size of the local pool to recruit from. Several cited difficulty finding staff that 'fit' the organization's culture.

For the few that struggle to retain staff, wages are the main issue, along with staff burnout and limited opportunities for career advancement within the organization.

Figure 14 : ARTS & CULTURAL ORGANIZATIONS – CHALLENGES RECRUITING AND RETAINING STAFF

% of Total Respondents



2.2.7 CONFIDENCE IN MANAGEMENT CAPACITY

The arts and cultural organizations were asked to express their confidence in a variety of management attributes. In general the organizations were highly confident in their ability to manage people, plan and manage finances and promote the organization. They were less confident in their ability to generate sales.

Table 29 : ARTS & CULTURAL ORGANIZATIONS – CONFIDENCE IN MANAGEMENT CAPACITY

% of Total Respondents

	Confident to very confident	Somewhat to not confident
Leading and managing people	94%	6%
Planning and managing finances	88%	12%
Promoting and marketing the organization	91%	9%
Developing and making sales (e.g. negotiating, pitching to customers)	67%	33%
Newsletters	23	61%
Social media and social networking	80%	20%
Technical skills required for business or sales	70%	30%

2.2.8 GAPS IN PROGRAMMING AND SERVICES IN NEW BRUNSWICK

There is a feeling among these organizations that government should provide greater funding to the arts. A few suggested more operational funding but most of the ideas were related to specific support such as the promotion of exports, supporting online sales, etc.

Better collaboration between artists was considered to be the top growth driver by the respondents to the survey. Also, a majority of the organizations suggested there was a role for government to help promote the sector outside New Brunswick. The organizations were less concerned about organizational management and business skills as a barrier to growth.

Several of the organizations saw the need for greater technical skills related to the process of raising funds such as establishing mock juries, providing support for grant writing, online sales, etc. Several organizations called for an online arts and cultural resource database.

Other interesting ideas included:

- An exchange residency programme where our visual artists would be able to visit and learn in other countries and artists from other countries could come here.
- Internship programs for arts' managers, technical people and artists.

2.2.9 CHALLENGES AND OPPORTUNITIES

The arts and cultural organizations were asked to indicate what, in their opinion, were the three biggest challenges to advancing New Brunswick's arts and cultural sector. The issue of public engagement with the arts and cultural sector was widely cited (again) as a big challenge to the growth and success of the sector.

Another big issue relates to scale. There are a lot of artistic and cultural organizations across the province (13 such organizations filled out the survey) but very few have the scale required to be able to offer much more than superficial support for their segment of the sector. When asked to list challenges to their sector's growth, these organizations talked a lot about the lack of human resources and funding to tackle big issues such as export development, fundraising support, mentorship development and training.

It is also interesting to note the number of organizations that discussed New Brunswick's emerging demographic challenges as a barrier to future growth. The out-migration of young artists, the aging population in general and the lack of immigration were all mentioned by multiple organizations.

Many organizations felt that government and business support for the arts was well below what it should be compared to other jurisdictions.

2.2.10 FOSTERING A DYNAMIC AND RESILIENT ARTS AND CULTURAL SECTOR

The arts and cultural organizations were asked to indicate what, in their opinion, were the ways that New Brunswick could foster a dynamic and resilient arts and cultural sector.

Most of the organizations provided thoughtful responses to this question. The majority of ideas were recurring themes throughout the survey process including:

- Encourage greater collaboration – particularly in the area of export market development.
- Fostering a stronger base of government and business financial support for the arts.
- Encouraging public awareness and support for the arts. It was felt that newspapers, social media and other ways of communicating with the public could be better developed.
- Focusing on arts and cultural education starting at an early age and by supporting post-graduate studies in the arts.

There were two other interesting themes. A number of the organizations singled out the federal government as a source of funding that needs better development. The other one was related to the target audience for the survey which was mostly English language arts and cultural organizations. Several of these organizations felt the Francophone arts and cultural sector was more developed, cohesive and had a strong brand relative to their Anglophone counterparts.

APPENDIX 3: HOUSEHOLD ARTS AND CULTURE PARTICIPATION AND SPENDING

3.1 HOUSEHOLD PARTICIPATION IN ARTS AND CULTURE

The consulting firm Hill Strategies Research Inc. was commissioned in 2012 to prepare a report on how Canadians are interacting with the country's arts and cultural sector. All the data in this section comes from this report. It is based on 2010 Statistics Canada data from the General Social Survey .

According to the report, virtually all adult New Brunswickers participated in an arts, culture or heritage activity in 2010. A full 99.7 percent, or 634,000 people, participated in at least one of the 18 arts, culture or heritage activities identified in the Hill Strategies report.

The 18 arts, culture or heritage activities are:

- Visiting a public art gallery or art museum (including attendance at special art exhibits)
- Visiting museums other than public art galleries or art museums
- Attending a theatrical performance such as drama, musical theatre, dinner theatre, comedy
- Attending a popular musical performance such as pop, rock, jazz, blues, folk, country and western
- Attending a symphonic or classical music performance
- Attending a cultural or artistic festival (such as film, fringe, dance, jazz, folk, rock, buskers or comedy)
- Attending a performance of cultural or heritage music, theatre or dance (e.g. Aboriginal Peoples, Chinese)
- Attending any other kind of cultural performance
- Visiting an historic site
- Visiting a zoo, aquarium, botanical garden, planetarium or observatory
- Visiting a conservation area or nature park
- Reading a newspaper
- Reading a magazine
- Reading a book
- Going to a movie or drive-in
- Watching a video
- Listening to downloaded music on a computer, MP3 player, etc.
- Listening to music on CDs, cassette tapes, DVD audio discs, records, etc.

Nearly one in three New Brunswickers visited a museum in 2010 and 60.5 percent attended a performing arts event or a cultural festival. The performing arts data does not differentiate between a local or national/international performer. Nearly 70 percent (68.6 percent) of New Brunswickers had visited a heritage venue (including historic sites, zoos, botanical gardens, conservation areas and nature parks). Almost everyone (96 percent) had read a newspaper, magazine or book in 2010.

The report shows the changing pattern of New Brunswickers participating in arts and cultural activities over time. Between 1992 and 2010, there was a jump in the number of people visiting art galleries (from 12.6 percent in 1992 to 22.6 percent in 2010) and a fairly significant increase in the number of people visiting museums (23.2 percent in 1992 compared to 32.9 percent in 2010).

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One of the largest increases was in the number of persons going to the movies. In 1992 only 38.6 percent had attended the movies at least once during the year while in 2010 it was up to 58.4 percent.

New Brunswickers are still participating in most arts and cultural activities far less than Canadians as a whole. In 2010, 22.6 percent of New Brunswickers went to public art galleries compared to 35.7 percent among all Canadians. The same can be said about going to museums other than art galleries (22.9 percent of New Brunswickers versus 32.7 percent of all Canadians).

Other notable variances included:

- Attending theatre performances (35.9 percent of New Brunswickers versus 44.3 percent of all Canadians)
- Attending classical music performances (7.0 percent of New Brunswickers versus 12.6 percent of all Canadians)
- Attending cultural festivals (29.9 percent of New Brunswickers versus 32.7 percent of all Canadians)
- Visiting historic sites (39.1 percent of New Brunswickers versus 45.7 percent of all Canadians)
- Reading newspapers (78.9 percent of New Brunswickers versus 86.4 percent of all Canadians)

3.2 HOUSEHOLD SPENDING ON ARTS AND CULTURE

Statistics Canada compiles data on how the average household in New Brunswick spends its total income each year. Some of that spending is on arts and culture-related activities such as artists' materials, live performing arts, etc. In 2009, slightly fewer New Brunswick households attended live performing arts and museums compared to the national average. The average household spending on several categories is shown in Table 30. New Brunswick households spend below the national average on the purchase of photographic goods and services and on attending live performing arts. They spend about average on admission to museums and on the purchase of artists' materials, handicraft and hobbycraft kits and materials.

Table 30 : AVERAGE HOUSEHOLD EXPENDITURES ON ARTS & CULTURE IN NEW BRUNSWICK (2009)

	Artists' materials, handicraft & hobbycraft kits & materials	Photographic goods & services	Live performing arts	Admission to museums & other activities
Saskatchewan	$36.00	$145.00	$141.00	$41.00
Alberta	$46.00	$171.00	$135.00	$53.00
Manitoba	$31.00	$117.00	$123.00	$38.00
Ontario	$33.00	$138.00	$113.00	$40.00
Canada	$35.00	$122.00	$105.00	$37.00
Prince Edward Island	$20.00	$96.00	$101.00	$25.00
British Columbia	$39.00	$112.00	$98.00	$33.00
Quebec	$32.00	$85.00	$88.00	$28.00
Nova Scotia	$37.00	$121.00	$80.00	$32.00
New Brunswick	$33.00	$102.00	$72.00	$37.00
Newfoundland and Labrador	$17.00	$91.00	$56.00	$21.00

Source: Statistics Canada CANSIM Table 203-0010

APPENDIX 4: GOVERNMENT FUNDING SUPPORT FOR ARTS & CULTURE

In general, New Brunswick generates among the lowest levels of government funding for arts and culture of any province across Canada. This includes federal, provincial and municipal government funding.

4.1 PROVINCIAL GOVERNMENT

Statistics Canada tracks public spending on culture across more than a dozen sub-sectors from libraries to supporting multiculturalism. This spending includes capital expenditures, operating expenditures associated with government entities and operating grants, contributions and transfers to other arts and cultural institutions across the province.

From 2003/3004 to 2009/2010 combined, the New Brunswick government spent a total of $453 million on culture as defined by Statistics Canada (Table 31). The vast majority of this spending was on libraries (41 percent) and heritage resources (37 percent). The remaining 22 percent of spending was distributed across a number of categories including performing arts ($19 million over the seven years), $12.3 million to film and video and $16.8 million to arts education.

Table 31 : NEW BRUNSWICK GOVT. EXPENDITURES ON CULTURE (000S) CUMULATIVE SPENDING 2003/2004-2009/2010

	000s	% Breakdown
Total culture activities	$453,709	
Total libraries	$187,043	41%
Public libraries	$89,045	20%
School libraries	$35,0150	8%
University and college libraries	$62, 845	14%
Total heritage resources	$167, 025	37%
Museums	$62,395	14%
Public archives	$19,138	4%
Historic parks and sites	$54, 692	12%
Nature and provincial parks	$20, 220	4%
Other heritage resources	$10, 578	2%
Arts education	$16, 811	4%
Literary arts	$4, 455	1%
Performing arts	$19, 163	4%
Visual arts and crafts	$4, 672	1%
Film and video	$12, 296	3%
Broadcasting	$583	0%
Sound recording	$2, 659	1%
Multiculturalism	$3, 132	1%
Multidisciplinary and other activities	$35, 876	8%

Source: Statistics Canada CANSIM Table 505-0003

On a per capita basis, the New Brunswick government is in the middle of the pack compared to the other provinces with spending on culture.

However, the province is second lowest in Canada for operating grants, contributions and transfers to external arts and cultural organizations.

Table 30 : PER CAPITA PROVINCIAL GOVT. SPENDING ON CULTURE CUMULATIVE SPENDING 2003/2004-2009/2010

	All culture activities expenditures	Operating grants, contributions and transfers only
Newfoundland and Labrador	$748.75	$431.74
Prince Edward Island	$744.42	$328.57
Nova Scotia	$564.41	$360.93
New Brunswick	$602.66	$309.96
Quebec	$741.33	$334.85
Ontario	$380.22	$188.16
Manitoba	$756.24	$407.73
Saskatchewan	$815.19	$494.78
Alberta	$571.55	$340.88
British Columbia	$402.46	$326.20

Source: Statistics Canada CANSIM Table 505-0003

Table 33 shows per capita spending on arts and culture by the provincial government for selected sub-sectors. Again the dollar amounts are per capita and for the cumulative period 2003/2004 through 2009/2010 to provide more than just a single year perspective.

The New Brunswick government spends the most in Canada per capita on historic parks and sites and the second most in Canada on public libraries. The province also spends the most per capita on the sound recording sector although the absolute dollars are relatively small compared to other spending categories.

The New Brunswick government spends well below average on performing arts, film and video production and among the lowest in the country on the visual arts and crafts sector.

The Quebec government outpaces all other governments in most of the arts sectors. It spends more than four times as much on performing arts compared to New Brunswick and more than twice as much per capita on film and video production. It also spends more than three times as much on the visual arts and crafts sector.

Table 33 : PER CAPITA PROVINCIAL GOVT. EXPENDITURES ON CULTURE CUMULATIVE SPENDING 2003/2004-2009/2010

	Historic Parks & Sites	Museums	Public libraries	Multiculturalism
Newfoundland and Labrador	$20.92	$61.37	$125.78	$3.97
Prince Edward Island	$1.79	$76.05	$113.76	$1.19
Nova Scotia	$2.99	$149.30	$95.41	$3.65
New Brunswick	$72.65	$82.88	$118.28	$4.16
Quebec	$36.58	$96.33	$26.34	$8.45
Ontario	$14.36	$93.73	$18.15	$1.13
Manitoba	$1.70	$88.93	$38.66	$4.04
Saskatchewan	$9.12	$49.76	$66.50	$9.52
Alberta	$33.64	$56.14	$63.55	$10.48
British Columbia	$7.35	$43.98	$24.75	$1.44

	Art education	Film & video	Literary arts	Performing arts
Newfoundland and Labrador	$2.95	$12.46	$5.24	$102.25
Prince Edward Island	$2.01	$27.87	$0.99	$36.68
Nova Scotia	$45.83	$29.05	$3.21	$24.82
New Brunswick	$22.33	$16.33	$5.92	$25.45
Quebec	$24.53	$38.18	$9.54	$106.49
Ontario	$11.65	$4.80	$3.67	$17.62
Manitoba	$7.27	$20.16	$5.12	$41.70
Saskatchewan	$3.59	$96.61	$10.22	$35.81
Alberta	$62.91	$37.94	$2.16	$37.77
British Columbia	$19.76	$11.63	$1.77	$10.16

	Sound recording	Visual arts & crafts
Newfoundland and Labrador	$0.21	$27.44
Prince Edward Island	$2.75	$21.86
Nova Scotia	$0.57	$6.44
New Brunswick	$3.53	$6.21
Quebec	$2.45	$22.85
Ontario	$0.52	$3.67
Manitoba	$4.84	$8.42
Saskatchewan	$2.06	$29.32
Alberta	$0.20	$21.19
British Columbia	-	$3.31

4.2 FEDERAL GOVERNMENT

Over the seven year period, the federal government spent approximately $586 per capita on culture in New Brunswick. This was 24 percent lower than the national average and lower than all provinces east of Manitoba. Between 2003/2004-2009/2010, the federal government actually spent almost as much on culture in New Brunswick than the provincial government. Like the province, a large portion was spent on nature and parks but unlike the province, the largest expenditure by far was on broadcasting (the CBC). The federal government spent over $230 million on broadcasting over the seven year period in New Brunswick.

Table 34 below shows federal government expenditures on culture across the broad subsectors. New Brunswick receives more than its share of federal spending on nature and provincial parks and slightly above average in the category "Multidisciplinary and other activities". The federal government spends very little of its literary arts and film and video funding in New Brunswick. Federal government spending on performing arts has been rising in recent years and is now approaches two percent of its national spending in New Brunswick.

Table 34 : FEDERAL GOVT. EXPENDITURES ON CULTURE IN N.B. ($000S) CUMULATIVE SPENDING 2003/2004-2009/2010

	000s	% of Federal Expenditures in NB	% of Federal Expenditures Across Canada
Total culture activities	$441,445		1.7%
Total heritage resources	$ 126,030		1.7%
Museums	$ 12,738	3%	0.6%
Historic parks and sites	$ 9,297	2%	1.4%
Nature and provincial parks	$ 103,158	23%	4.8%
Literary arts	$ 6,476	1%	0.7%
Performing arts	$ 31,122	7%	2.0%
Visual arts and crafts	$ 3,666	1%	2.4%
Film and video	$ 13,778	3%	0.6%
Broadcasting	$ 230,052	52%	1.9%
Multiculturalism	$ 1,911	0%	1.6%
Multidisciplinary and other activities	$ 28,374	6%	2.5%

Source: Statistics Canada CANSIM Table 505-0003

Table 35 : PER CAPITA FEDERAL GOVT. EXPENDITURES ON CULTURE IN N.B. CUMULATIVE SPENDING 2003/2004-2009/2010

	Historic Parks & Sites	Museums	Public libraries	Multiculturalism
Newfoundland and Labrador	$61.94	$5.49	-	$1.49
Prince Edward Island	$59.96	$5.27	-	$2.37
Nova Scotia	$127.98	$9.61	-	$1.81
New Brunswick	$12.35	$16.92	-	$2..54
Quebec	$25.54	$97.75	-	$4.26
Ontario	$10.46	$90.40	-	$3.08
Manitoba	$31.25	$7.59	-	$1.74
Saskatchewan	$31.06	$4.86	-	$1.96
Alberta	$6.21	$2.20	-	$1.57
British Columbia	$6.99	$3.54	-	$1.58

	Art education	Film & video	Literary arts	Performing arts
Newfoundland and Labrador	$0.03	$24.04	$9.69	$30.45
Prince Edward Island	-	$11.73	$4.47	$152.22
Nova Scotia	-	$65.69	$11.03	$31.85
New Brunswick	-	$18.30	$8.60	$41.34
Quebec	$5.04	$119.20	$28.68	$35.52
Ontario	$5.20	$34.47	$17.13	$61.55
Manitoba	$6.15	$27.59	$10.48	$43.35
Saskatchewan	$0.34	$12.71	$6.59	$17.25
Alberta	$2.55	$11.31	$7.13	$22.97
British Columbia	$0.90	$38.30	$12.48	$27.66

	Sound recording	Visual arts & crafts
Newfoundland and Labrador	$0.07	$3.71
Prince Edward Island	$0.72	$8.28
Nova Scotia	$0.14	$6.08
New Brunswick	$0.05	$4.87
Quebec	$4.96	$5.02
Ontario	$1.15	$3.98
Manitoba	$0.58	$4.16
Saskatchewan	$0.02	$7.02
Alberta	$0.04	$2.52
British Columbia	$1.45	$5.43

4.3 CANADA COUNCIL FOR THE ARTS FUNDING

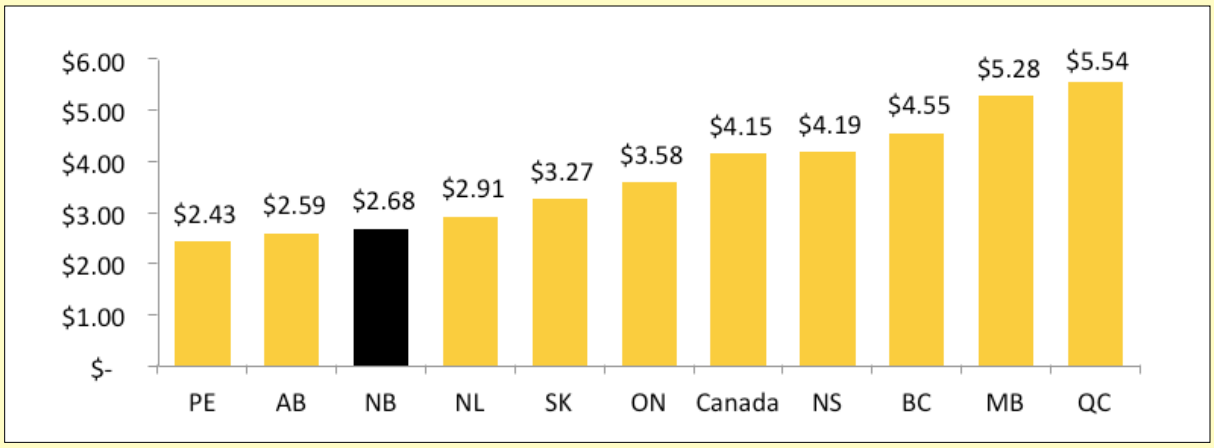
One of the reasons overall federal culture spending in New Brunswick is well below average has been the level of Canada Council for the Arts spending in the province. Between 1999/2000 and 2011/2012, CCA funding has been well below average in the province as shown in Table 36. Over the period, per capita funding has been third lowest in Canada – more than 30 percent below the national average. One of the reasons has been the lower level of grant applications (Table 36). New Brunswick artists and institutions submit well below the province's relative share of grant applications each year. See Appendices B and C for the industry view related to Canada Council funding.

Table 36 : CANADA COUNCIL FOR THE ARTS – FUNDING TO NEW BRUNSWICK (2000 TO 2012)

	Grants to New Brunswick Artists & Organizations	Percentage of Canadian Total	Grant applications from New Brunswick	Percentage of Canadian Total
1999-00	$1,549,819	1.5%	235	1.6%
2000-01	$1,754,168	1.8%	204	1.5%
2001-02	$2,010,550	1.6%	213	2.0%
2002-03	$2,171,148	1.7%	222	1.6%
2003-04	$1,756,171	1.4%	217	1.5%
2004-05	$1,889,720	1.6%	279	1.7%
2005-06	$1,828,508	1.5%	256	1.6%
2006-07	$2,107,799	1.5%	313	2.0%
2007-08	$2,144,875	1.4%	216	1.5%
2008-09	$2,135,105	1.5%	232	1.5%
2009-10	$2,015,550	1.4%	217	1.3%
2010-11	$1,968,505	1.4%	206	1.3%
2011-12	$2,278,833	1.6%	218	1.4%

Source: Canada Council for the Arts

Figure 15 : CANADA COUNCIL FOR THE ARTS – PER CAPITA FUNDING BY PROVINCE ANNUAL AVERAGE 2002-2011



Adjusted for population size, Fredericton area is the largest recipient of Canada Council funding among the various communities across New Brunswick. Over the 10 year period, Fredericton artists and institutions received over $6.5 million. Moncton area artists and institutions received $6.1 million over the same period. Sackville and Caraquet ranked third and fourth respectively.

Table 37 : CANADA COUNCIL FOR THE ARTS – FUNDING TO NEW BRUNSWICK BY COMMUNITY TOTAL 2000-2001 TO 2009-2010

	Total Funding	% of Total
Fredericton	$6,530,424	33%
Moncton	$6,067,555	31%
Sackville	$2,349,170	12%
Caraquet	$2,123,642	11%
Saint John	$593,475	3%
Dalhousie	$389,900	2%
Edmundston	$384,765	2%
Dieppe	$98,570	0%
Total	$19,813,594	

Source: Canada Council for the Arts

The main artistic organizations funding by the Canada Council are listed in Table 38.

Table 38 : CANADA COUNCIL FOR THE ARTS – TOP FUNDED ORGANIZATIONS IN NEW BRUNSWICK (2011-2012)

Organization	Community	Total funding
Goose Lane Editions	Fredericton	$186,300
Theatre New Brunswick	Fredericton	$150,000
Coopérative de Thé•tre l'Escaouette	Moncton	$138,500
Struts Gallery Inc.	Sackville	$125,320
Atlantic Ballet Theatre of Canada	Moncton	$125,000
Owens Art Gallery	Sackville	$113,000
New Brunswick Filmmakers' Co-opera-	Fredericton	$76,400
Canadian Crafts Federation	Fredericton	$71,000
Beaverbrook Art Gallery	Fredericton	$60,000
Galerie Sans Nom Co-op Ltée	Moncton	$60,000
Film Zone Inc.	Moncton	$50,318
The Fiddlehead	Fredericton	$42,600

Source: Canada Council for the Arts

4.4 MUNICIPAL GOVERNMENT FUNDING

On average, New Brunswick municipalities spend 57 percent less on culture than the Canadian average. Municipal governments across New Brunswick spent slightly more than $28 million on culture in 2009-2010 (the most recent year data is available). This represented approximately four percent of total municipal spending in 2010.

The bulk of this spending went to libraries (65 percent). New Brunswick municipalities spend slightly more per capita on culture than those in Newfoundland and Labrador and Prince Edward Island but less than the rest of the country.

Table 39 : MUNICIPAL GOVERNMENT EXPENDITURES ON CULTURE IN NEW BRUNSWICK (2009-2010)

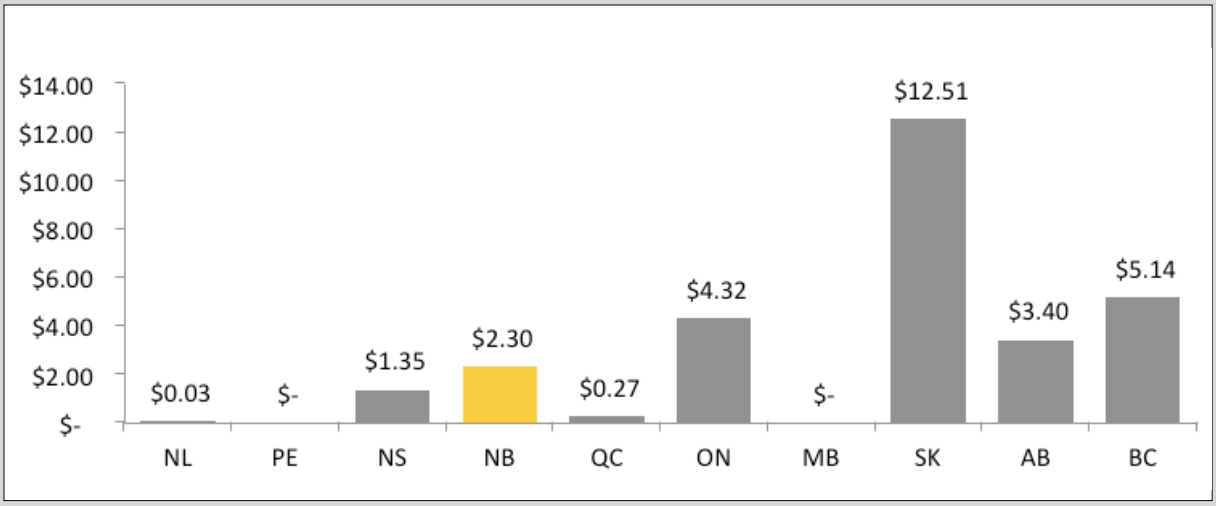
	Per Capita $$	% of Total Government Spending (All Levels)
Canada	$87	29%
Newfoundland and Labrador	$31	10%
Prince Edward Island	$32	9%
Nova Scotia	$58	20%
New Brunswick	$37	14%
Quebec	$76	20%
Ontario	$97	36%
Manitoba	$53	20%
Saskatchewan	$103	33%
Alberta	$99	36%
British Columbia	$100	49%

Source: Canada Council for the Arts

New Brunswick municipalities invested more than the median province in 2009-2010 on performing arts. Municipal governments spent $1.7 million on performing arts across the province (0.25 percent of total municipal spending in 2010). There are very wide variations on municipal spending towards performing arts across Canada as shown in Figure 16.

New Brunswick municipalities spent $2.30 per capita on performing arts while Newfoundland and Labrador, Prince Edward Island, Quebec and Manitoba spent virtually nothing. Quebec is particularly interesting because the federal and provincial governments spent nearly $182 million on performing arts in 2009-2010 while municipal governments spent only $2.1 million.

Figure 16 : PER CAPITA MUNICIPAL GOVERNMENT EXPENDITURES ON PERFORMING ARTS (2009-2010)



Source: Canada Council for the Arts