Communauté métropolitaine de Montréal

Culture Cluster

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Communauté métropolitaine
de Montréal

Québec

Avec la participation de :

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Note to the reader

Through its Economic Development Plan, the Communauté métropolitaine de Montréal (CMM), has adopted a competitiveness strategy centred on dynamic and innovative business clusters. In the fall 2003, the CMM launched a cluster identification program for metropolitan Montreal. This marked the first phase of a process leading to the development and launch of an integrated economic development and innovation strategy.

For each of the sectors studied, the CMM wishes to join forces with all the territorial bodies and economic stakeholders concerned. It means to concentrate its efforts on its own role of planning and coordination and does not intend to take the place of existing players and decision-makers in the field, whose role it is to agree on a development plan under the supervision of a relay organization representing their sector.

This document is divided into two distinct sections:
- The first section presents a configuration of the Culture cluster;
- The second section groups together the ideas of the main players of that particular cluster and their thoughts on future development.

The cluster configuration was based on documentary research confirmed by stakeholders in the cluster itself. Comments were then made by industry officials in the ministries concerned. This first section describes the value chain of the cluster and goes on to identify the organizations or infrastructure contributing to its development. Finally, as economic development transcends administrative or political borders, potential links with other regions of Quebec are indicated, taking into account the niches of excellence developed by certain regions under the ACCORD (Action concertée régionale de développement) program.

While the first section of the document is inherently factual, the second is more subjective, since it reflects the perceptions of the main players in each cluster. These thoughts were gathered in the strictest confidence so as to produce a maximum amount of data. They are focused on two main themes, the state of relational assets and growth strategies. Since we know that relationships between stakeholders are the first source of innovation, it is necessary to identify the relational flow between the various components of the cluster. In the same way, in order to set priorities, we need to know which strategies for growth are favoured by the players in the field.

This document is thus intended as a catalyst for priority actions aiming to energize the strategic process of the cluster and to give direction to its innovative thrust. The process will be carried out in a spirit of openness and dialogue which will eventually enable the Montreal metropolitan area to assert its distinctive capabilities among the world's most innovative and prosperous cities.

Yves Charette
Coordinator, Metropolitan Economic Development
Communauté métropolitaine de Montréal

Configuration

Perceptions

An Essential Cluster in the Development of Montreal's Metropolitan Region

An economic cluster can be defined as:

> *«Geographic concentrations of interconnected companies and institutions in a particular field, that share a number of common elements and complimentarities; the cluster's geographic proximity can be anything from a single city or region to an entire country, or even a network of neighbouring countries.»*[1]

It is not an easy task to tie in the separate universes that are economy and culture. This liaison is all the more difficult to achieve since the cultural world cannot easily be expressed according to a single definition, given that it covers such a large spectrum of activities. That is why it is useful to look at the related notion of «creative ecology» to better define what is meant by a cluster devoted to culture:

> *«Creative ecology refers to the overall 'system' and 'context' that is required for successful and sustainable creative industries development. Cultural producers do not operate in isolation. Rather, they develop their practice through relationships with others, with support providers, trainers, markets, consumers etc. The richer the assortment of relationships, the greater the opportunities to develop, both creatively and commercially. A creative ecology assumes these relationships will embrace both commercial profit and cooperative exchange, that as well as producing economic value, they will sustain intergenerational equity.»*[2]

The steps undertaken by the CMM are directly related to the spirit of this notion of creative ecology. The cultural cluster concept is an attempt to understand the relationships surrounding the production of cultural goods and services in the Montréal metropolitan region, the strengths and weaknesses of the cluster, as well as its development factors. Of course, since this approach is the result of an excercise in economic development planning, particular attention must be paid to the the economic spinoffs produced from the creativity, skill and talent of individuals or groups. The reference territory is the Montreal metropolitan region, although it is evident that each administrative entity (cities, MRCs, regions) has its own particularities.

Today there is no longer any need to prove that culture contributes directly to economic growth. The activities of the cultural sector in the metropolitan region of Montreal annually represent $5.6 billion in operational expenses and provide work to more than 90,000 people, representing approximately 5.1% of the total labor force.[3]

1 Porter, E.M. «Clusters and the New Economics of Competition» Harvard Business Review, November-December, 1998.
2 Council of Europe; URL = http://www.coe.int/T/E/Cultural_Co-operation/Culture/Action/CCC/b_basics.asp#P18_1147
3 Juneau, Albert. Impact économique des activités du secteur de la Culture dans cinq régions du Montréal métropolitain et de la région de l'Île de Montréal. [Economic Impact of the Culture Sector in Five Metropolitan Montréal and Island of Montreal Areas] 1998.

Even though the cultural activity of the Montreal metropolitan region is mainly viewed in this document through the lens of direct economic spinoffs, we still need to keep in mind its multiple other facets.

On one hand, the cultural sector influences and cross-sects all other economic sectors. Creativity is today recognized as one of the drivers of the new economy, and culture is obviously intrinsic to creativity. While there are different types of creativity – technological and economic creativity as well as artistic and cultural creativity[4] – they mutually support and stimulate each other in a system of cross-pollination. Creativity plays an increasingly important role in the vitality of our national economy. It does so in particular by improving the innovative capacity of workers, companies and institutions.

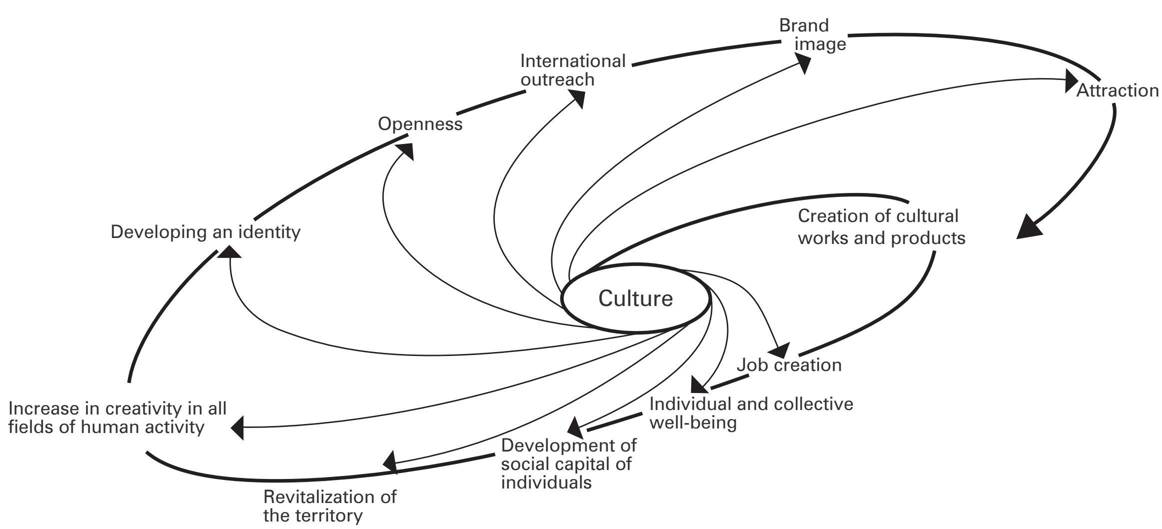
Furthermore, culture contributes to social development as well as to improving quality of life and quality of surroundings. Many studies show that culture plays a role in revitalizing territories, developing social capital and individual capabilities, offering citizens new responses to their aspirations while reinforcing individual and collective well-being.

This is why cities worldwide are implementing initiaves to support and increase local creativity. It is recognized that creative cities excel in producing a quality environment and in attracting talented people, to the extent that these cities make the necessary financial and human investments.

Finally, it goes without saying that the cultural vitality of a territory, even of a society or of a nation, adds to its attraction and constitutes one of the main elements of its international identity and image. The presence of talented and creative people who are active in multiple disciplines projects the image of a tolerant society that is open to differences and that offers an environment of rich and stimulating meetings and exchanges.

It is to take into account these multiple facets that it has been decided to identify the Culture Cluster as an outreach cluster, i.e. a cluster that, while being an extraordinary asset for the economic development of the Montréal metropolitan region as well as for the social development and quality of life of its population, contributes to the brand image of the region on an international scale.

The Multiple Facets of Culture



4 Florida, Richard. The rise of the Creative Class. 2002.

The exercise undertaken by the CMM to define the Culture Cluster in the Montréal metropolitan region is not unique. Similar approaches are underway around the world at various territorial levels in places as diverse as Australia, Korea, the United States, the United Kingdom, Singapore and the European Union.

As an example, a report concerning the creation of cultural clusters prepared by the University of Newcastle upon Tyne Centre for Urban and Regional Development describes four ways that creative industries contribute to economic development:

- They contribute directly in terms of job creation and wealth creation through the production, distribution and retail of goods and services and demand generated for goods, while providing inputs to the other sectors.

- Certain aspects of industries based on creativity constitute a trait of, or contribute to a set of activities generating a tourist attraction.

- Certain aspects of industries based on creation constitute a part of the infrastructure necessary for a modern region, and that contributes to attracting and retaining investors, qualified labor and students.

- Certain aspects of industries based on creation can contribute to creating an attraction in the region, increasing the collective interest for the region both nationally and internationally.

Source: Census Metropolitan Areas as Culture Clusters, Trends and Conditions in Census Metropolitan Areas, David Coish, Statistics Canada – Culture, Tourism and the Center for Education Statistics, October 2004

Also we must not forget that this exercise by the CMM is in continuity with the numerous reports and events of the past twenty years which have put forward cultural industries, culture and creativity as elements that are essential for the development of the Montréal metropolitan region. In 1986 the Picard report[5] identified cultural industries as one of the seven avenues necessary to reposition the Montréal metropolitan region as one of the main drivers of Canadian growth and to make Montréal a major international city. In 1993, the Pichette report[6] also identified cultural development as one of the means of action that were apt to promote integrated and long-term development of Montréal and its region. Closer to home, during the 2002 Montréal Summit the first avenue for development chosen for the city put the accent on "Montréal – A Metropolis of Creation and Innovation, Open to the World" and recommended in particular establishing projects related to culture.

This document defining the Culture Cluster in the Greater metropolitan region of Montréal complements other reflection and planning tools that adopted by various groups, associations or municipal and government institutions. Let us mention among others the cultural development agreements that were signed between the municipalities and the Minister of Culture and Communications. Several Quebec municipalities have also adopted municipal cultural policies or are about to do so.

5 Report by the Advisory Committee to the Ministerial Committee on the development of the Montréal Region, November 1986.

6 Montréal une ville-région, efficace, prospère et vibrante à vocation internationale, au service de ses citoyens [Montréal, an Efficient, Prosperous, Vibrant and International City-Region, at the Service of its Citizenns]. Report by the Montréal and its Region Task Group, December 1993.

Summary of Observations in This Document

It is evident that the Montreal metropolitan region constitutes the main cultural hub in Quebec, as much in terms of creation and production as distribution. That being said, there are artists and authors found throughout the province as well as cultural organizations and companies, and venues and events that nurture Montréal's cultural activity and are in turn nurtured by it.

What is more, the Montréal metropolitan region constitutes, with 97,800 people active in the cultural field (i.e., 5.5% of the total active population of the Montreal metropolitan region), the second largest cultural cluster in Canada after Toronto (Statistics Canada, 2004). The Montreal metropolitan region also ranks second in terms of salaries paid and income earned in most cultural sector industries. Montréal, however, comes in first in terms of performing arts. The Montreal metropolitan region also has more businesses than Toronto in industries related to film production, book publishing and sound recording.

Six sub-clusters

The cultural sphere is divided into three major sectors that are separate yet connected: arts and letters, cultural industries and heritage. Those sectors can be divided into six sub-clusters:

- Cinema, audiovisual and multimedia;
- Visual arts, media arts, crafts, design and architecture;
- Recording industry and package acts;
- Theatre and circus arts;
- Books and literature;
- Heritage and museology.

Cinema, audiovisual and multimedia: a dynamic sector

The film and television industry generates 35,000 direct jobs in Quebec (full-time equivalent). The total wage bill is $1.38 billion per year. The Montreal metropolitan region has 64% (i.e., 22,400) jobs and 75% of the 500 establishments related to this industry[7]. This employment level places audiovisual right after aeronautics and before the sectors of printing, computer products manufacturing and biopharmaceuticals. By its concentration, ramifications and size, it constitutes a sizeable economic sector, as was shown by the Forum metropolitain de l'industrie cinématographique (Metropolitan Forum for the Cinematography Industry) held in Montréal on November 29, 2004. There are three dynamic components that can be distinguished in this industry: domestic production, co-production and foreign production. To those can be added the related industry of multimedia.

7 Data and statistics of this section come from various documents and studies produced during the Forum métropolitain de l'industrie cinématographique held in Montréal in November 2004. In particular see the following documents: Une filière d'envergure, la production audiovisuelle et les industries connexes dans la région de Montréal et au Québec [A Substantial Sector: Audiovisual Production And Related Industries in the Montréal Region and the Province of Quebec]. E & B Data, March 2004; Étude de positionnement de l'industrie du cinéma au Québec, les tournages américains : bilan, perspectives, strategies [Quebec Movie Industry Positioning Study: Filiming American Movies – Balance Sheet, Outlook, Strategies]. Jacques Grysole, Expansion Stratégies inc., November 2004; Impacts économiques des tournages étrangers au Québec [Economic Impact of Foreign Filming in Quebec]. E & B Data, November 2004. See also film industry statistics from the Institut de la statistique du Québec, 2004 Edition

Visual arts and media arts: dynamic sectors that contribute to regional reach

Quebec has 3,207 visual arts artists including nearly 65% who live in the Montréal metropolitan region. The number of artists in media arts has strongly contributed to the international reach of the metropolitan region. Artists related to these various fields can rely on a variety of presentation venues: private galleries, cultural centres, municipal galleries, trade shows and festivals, as well as a number of exhibition centres and several museums. While the metropolitan region does have such experimentation centres as the Society for Arts and Technology and Oboro Goboro, it remains that there are insufficient venues for creation and production. The network of artists' studios in particular has suffered in recent years due to the real estate boom that has led to the reconversion of numerous buildings.

Crafts, design, architecture, urban planning and landscape architecture: growing sectors

Crafts, design, architecture, urban planning and landscape architecture find their applications in many economic sectors, beginning with the production of countless consumer goods, real estate construction, urban facilities and engineering. Quebec has nearly 2,500 creators in the field of crafts. However in the past several years the field of design has been particularly dynamic. An increased interest has in fact been observed with respect to changes in consumer habits. It is also with pride that in 2004 the City of Montréal was chosen as the location for the head offices of the International Design Alliance (IDA), winning out over competition from Brussels, Turin, Nagoya, Copenhagen and Hong Kong. Ties remain to be woven with the business sector, which does not always perceive the added value that not only design but also architecture, urban planning and landscape architecture can bring. Let us however mention that the creation of the Quartier international is a step in the right direction.

Recording industry and package acts: a market in jeopardy

A relatively young industry compared with the major international groups that are its competitors, the recording and package act industry began its expansion in the early 1980s. Today it produces 95% of all albums by Quebec artists and has garnered around a quarter of the Quebec record market, with the rest belonging to the major multinationals. Between 1999 and 2003, 273 albums and 335 acts were produced[8]. However, the recording and package act industry has not seen any real growth since 1995. The record market, which is the spearhead for the entire industry, has seen dark days because of downloading music from the Internet. Record producers are consequently demanding that an end be put to the double standard that exempts radio stations from paying royalty fees on their programs that broadcast over the Internet, and that Internet access suppliers be required, as are all other distributors, to pay royalties and authors' rights. While the Internet is exploding, other artists' showcases are struggling. With respect to radio broadcasting, the problem lies in diversity. In 2003-2004, the top 15 songs on the hit parade occuupied more than 50% of the broadcast time, which is an increase of more than 10% in one year.

8 Data and statistics of this section come from Statistiques principales de la culture et des communications au Québec [Main Culture and Communications Statistics in Quebec], Observatoire de la Culture et des Communications du Québec – Institut de la statistique du Québec, 2004 edition; Déchiffrer la culture au Québec, 20 ans de pratiques culturelles [Deciphering culture in Quebec – 20 years of cultural practices]. Ministère de la Culture et des Communications du Québec, Les Publications du Québec, 2004. See also: Synthèse sur le comportement et les pratiques des consommateurs en matière de commerce électronique du disque et de la musique [Summary of Consumer Behaviour and Practices with Regard to Buying Records and Music Online]. SODEC, December 2002; L'industrie du disque et du spectacles de variétés au Québec – portrait économique des enterprises [The Record and Package Acts Industry in Quebec]. SODEC, May 2002; and L'industrie du disque au Québec – portrait économique [Economic Portrait of the Record Industry in Quebec]. SODEC, October 1998.

Theatre and circus arts: A concentration of talent

The Montréal metropolitan region has a world-wide reputation for the diversity and effervescence of its performing arts. Montréal is home to nearly 85% of all artistic creative organizations in Quebec, i.e., 139 not-for-profit organizations, including 53 theatre companies, 33 music ensembles and 24 dance companies. Also, Cirque du Soleil, a circus that today entertains the entire world, is based in Montréal. The region presents the highest number of shows in Quebec, or more than 20 per 10,000 inhabitants. However, local production is seeing a drop in popularity. Companies are very dependent on subsidies. There is a lot of competition in this area due to a highly diversified offering and a relatively small population to draw on. Under these circumstances distributors have to increase advertising budgets, making their financial health even more precarious.

Books and literature: an abundant supply

In Quebec, the book market represents nearly 26 million copies sold and around $650 million in annual sales. More than 4,000 new Quebec titles are published every year. With foreign production, that means more than 29,000 new books on the shelves of bookstores and other businesses every year[9]. The Montréal metropolitan region is the main hub for book publishing, printing, distribution and sales in Quebec. Nearly 80% of the titles published in Quebec are published by publishers in this region. Also, almost half of all bookstores in Quebec are located here. Montréal's nomination as the World Book Capital for the year 2005-2006 by UNESCO should help this city to reinforce its position with respect to the national and international markets. According to the Association nationale des éditeurs de livre (National Book Publishers Association, ANEL) such an event will have a favourable impact on the visibility of Quebec as a literary capital by other countries. Montréal was chosen for the vitality of its publishing activity, among other reasons.

9 Data and statistics of this section come from Statistiques principales de la culture et des communications au Québec [Main Culture and Communications Statistics in Quebec], Observatoire de la Culture et des Communications du Québec – Institut de la statistique du Québec, 2004 edition; Déchiffrer la culture au Québec, 20 ans de pratiques culturelles [Deciphering culture in Quebec – 20 years of cultural practices]. Ministère de la Culture et des Communications du Québec, Les Publications du Québec, 2004 and Les chiffres des mots – portrait économiques du livre au Québec [Figures for Words – Economic Profile of the Book Industry in Qu.bec]. SODEC, May 2001.

Museology and heritage: a particular sub-cluster

The field of heritage and museology is a completely separate part of the cultural sphere. It is a such a vast and complex field that it is difficult to define and delineate. This field groups together areas for exhibition and interpretation of the material or non-material heritage as well as archive and conservation centres. The notion of museology groups three types of institutions in particular, i.e., museums that carry out acquisition, conservation, research, education, cultural action and presentation functions; exhibition centres that basically fulfil functions of research, education, cultural action and presentaiton; and performance venues that are devoted to conservation, sensitization and distribution. Archive and conservation centres primarily constitute a documentary source for both amateur and professional researchers. Restoration activities are also part of the picture and concern repair and rebuilding of heritage buildings, monuments, works or objects. There are many challenges related to this sub-cluster. The preservation of Montréal's heritage requires significant awareness-raising activities among citizens and their elected officials so that the heritate of the Montréal region and its community should remain in place. The preservation and showcasing of archives also represents major difficulties although new digital technologies are providing new means of presentation, in particular through virtual exhibitions. In addition, it is evident that heritage and museology are suffering from poor financing along with most other cultural fields.

Main Issues

Cooperation necessary among the sectors

The territory of the Montréal Metropolitan Community has a number of major associations and networks for cultural sector stakeholders. Despite the existence of these networks and the real efforts that are devoted to them, the great majority of stakeholders recognize that the actions taken have up to now been insufficient and that there is no real cooperation among the various players and associations. We can suppose that this is due at least in part to the very structure of the cultural sector, which is based on creators whose action is basically individual. We also see that the ties that should unite the cultural sectors to other educational, social and economic sectors are still very tenuous. It would be advantageous to develop stronger ties among the various associations of the cultural sector and interconnect the cultural, economic, social and educational networks.

Increase financing of research, creation and innovation

Creativity is one of the main assets of Montréal and its region. There is a climate of appreciation for creation based both on the singularity of its characteristics (language, diverse communities and narrow market, all three of which lead to innovation) and on an economic system that is composed of innovative artists, exciting enterprises, large scale events, and even a veritable «star system» which is proper to it. This creative vitality also has the characteristic of being spread out among all cultural disciplines, which is another of its strengths. Innovation is the trademark of Montréal creators who also have the advantage of being particularly versatile and able to enrich their work from one medium to another. However, it is observed that, too often, research and creation are only done by individuals, since organizations and businesses do not, with rare exceptions, have the financial means or the reflex to return back to this essential stage.

Investing in a certain number of infrastructures

It is widely recognized that the Montréal metropolitan region has a broad base of infrastructures for cultural presentation. Paradoxically, several of these venues are under-equipped both technically and technologically, or they would need to be upgraded to maintain their status. A certain number of deficiencies have been observed in creation-production infrastructures both in terms of the premises available and the means and expertise to support them. However, the availability of such premises is absolutely essential if Montréal's creativity is to continue to flourish.

To better support and harmonize forms of support

Although the Quebec cultural sector – and consequently the Montréal sector – is the best-supported in Canada, everyone agrees in saying that it is however an under-financed milieu, especially at the level of creation, and that unless something happens to change the entire current Canadian and Quebec fiscal system, public financing will always take a large role in supporting culture. A revision of the means of financing could however be beneficial and involve the development of alternative means. Also, harmonization of subsidy programs is desirable (application forms, criteria, dates, etc.) in order to facilitate the applications process.

Reinforcing the training of managers and encouraging professional developmen

Training offered to the cultural sectors presents certain deficiencies. It has been observed that there are limited possibilities open to people who are in careers in the cultural industry and who want to acquire specific training in management, marketing and financing. The cultural sector would have every advantage to develop abilities in management, marketing and financing, in mentoring and in exports. In addition, difficulty retaining young people trained in the cultural sector has been observed, since the sector does not always offer hiring conditions competitive with other business sectors.

Targeting awareness and audience development

There is abundant cultural material being offered. However, it would be wise to develop new audiences to appreciate the wealth and diversity of this offer. Unfortunately, despite the discourse on the importance of public awareness and audience development, few real efforts have been devoted to achievig that. However, to reach such an objective it would be wise to examine the audiences in question in order to better understand and know them, so that the cultural offering can be adapted to demand, whether it be young audiences, senior audiences or audiences from the various ethnocultural communities.

Promote diversity and crossovers

Culture is a social cohesion and integration factor. It not only enables individuals to assert themselves, but also to develop a feeling of belonging to the community. To achieve this, culture must however reach out to all the citizens of all the communities making up its population, beginning with ethnocultural communities. However, we observe that few efforts are devoted by the cultural sector to reach out to multiple audiences, who in turn rarely attend events.

Establish an attraction strategy

As we know, culture is a major attraction factor. It is a source of economic wealth and development for the Montréal metropolitan region, especially given its limited internal market. Montréal and its region must develop a true attraction strategy based on its cultural sources, providing itself with a unique signature based on its brand image, its unique atmosphere and its quality of life.

Some Figures

Active Population working in the Culture Cluster and its sub-clusters in the Montréal CMA in 2001, according to the North American Industry Classification System.

NAICS Code	Economic Sector	Active population Montreal CMA Number	% of total	Quebec Share (%)
	All sectors	1,765,760	100.00	48
	Culture Cluster	**97,755**	**5.54**	**65**
	Cinema, Audiovisual and Multimedia	15,250	0.86	80
5121	Motion picture and video industries	14,025	0.79	81
3346	Manufacture and reproduction of magnietic and optical support systems	1,225	0.07	67
	Visual Arts, Media Arts, Crafts, Design and Architecture	21,100	1.19	70
5413	Architecture, engineering and related services[1]	2,455	0.14	64
5414	Specialized design services	6,895	0.39	71
5418	Advertising and related services	11,750	0.67	70
	Recording Industry and Package Acts	11,590	0.66	63
5122	Sound recording industries	865	0.05	75
5131	Radio and television	5,630	0.32	63
5132	Pay TV, specialized channels and distribution of television shows	2,515	0.14	61
7113	Promoters of performing arts, sports and similar events	2,065	0.12	60
7114	Agents and managers for artists and other public figures	515	0.03	87
	Theatre and Circus Arts	10,390	0.59	70
7111	Performing arts companies	4,140	0.23	74
7115	Independent artists, writers and performers	6,250	0.35	67
	Books and Literature	37,360	2.12	61
3231	Printing and related support services	17,870	1.01	59
4512	Book, magazine and music stores	3,410	0.19	61
5111	Newspaper, periodical, book and directory publishers	10,955	0.62	64
5141	Information services	5,125	0.29	65
	Heritage and Museology	2,065	0.12	31
7121	Museums, historical sites and similar institutions	2,065	0.12	31

1. The architecture, engineering and related services sector (NAICS 5413) has been replaced by architects (C051) and landscape architects (C052) as it contans various activities that do not fall under the cultural framework.

Source : Statistics Canada, 2001 Canada Census

Active Population working in the Culture Cluster and its sub-clusters in the Montréal CMA from 1991 to 2001 according to the Standard Industrial Classification of 1980

SIC Code	Economic Sector	2001	1996	1991	2001/1996	1996/1991	2001/1991
	All sectors	1,765,760	1,609,825	1,667,165	10	-3	6
	Culture Cluster	**82,910**	**72,980**	**70,615**	**14**	**3**	**17**
	Cinema, Audiovisual and Multimedia	14,780	11,990	9,650	23	24	53
961	Motion picture, audio and video production and distribution	11,460	9,285	7,055	23	32	62
962	Motion picture exhibition	1,820	1,165	1,300	56	-10	40
655	Musical instrument and record stores	1,500	1,540	1,295	-3	19	16
	Visual Arts, Media Arts, Crafts, Design and Architecture	15,345	12,535	8,555	22	47	79
774	Advertising services	15,345	12,535	8,555	22	47	79
	Recording Industry and Package Acts	10,525	8,865	11,425	19	-22	-8
481	Telecommunications broadcasting	10,525	8,865	11,425	19	-22	-8
	Theatre and Circus Arts	7,790	6,160	5,635	26	9	38
963	Theatrical and other staged entertainment services	7,790	6,160	5,635	26	9	38
	Books and Literature	32,660	32,030	33,920	2	-6	-4
27	Printing, publishing and related industries	27,180	27,470	29,340	-1	-6	-7
651	Book and stationery stores	2,605	3,235	3,090	-19	5	-16
854	Library services	2,875	1,325	1,490	117	-11	93
	Heritage and Museology	1,810	1,400	1,430	29	-2	27
855	Museums and archives	1,810	1,400	1,430	29	-2	27

Source : Statistics Canada, 2001 Canada Census

Economic Impact of Culture Sector Activities for All Five Montréal metropolitan regions, 1992-1993

	Economic Impact
Total operating expenses	$5.6 billion
Net operating expenses	$5.3 billion
Assets	$4.7billion
Direct	$3.5 billion
Indirect	$1.2 billion
Jobs	89,900
Direct	61,800
Indirect	28,100

Source: Juneau, Albert. Impact économique des activités du secteur de la culture des cinq régions du Montréal métropolitain et de la région de l'île de Montréal, 1998

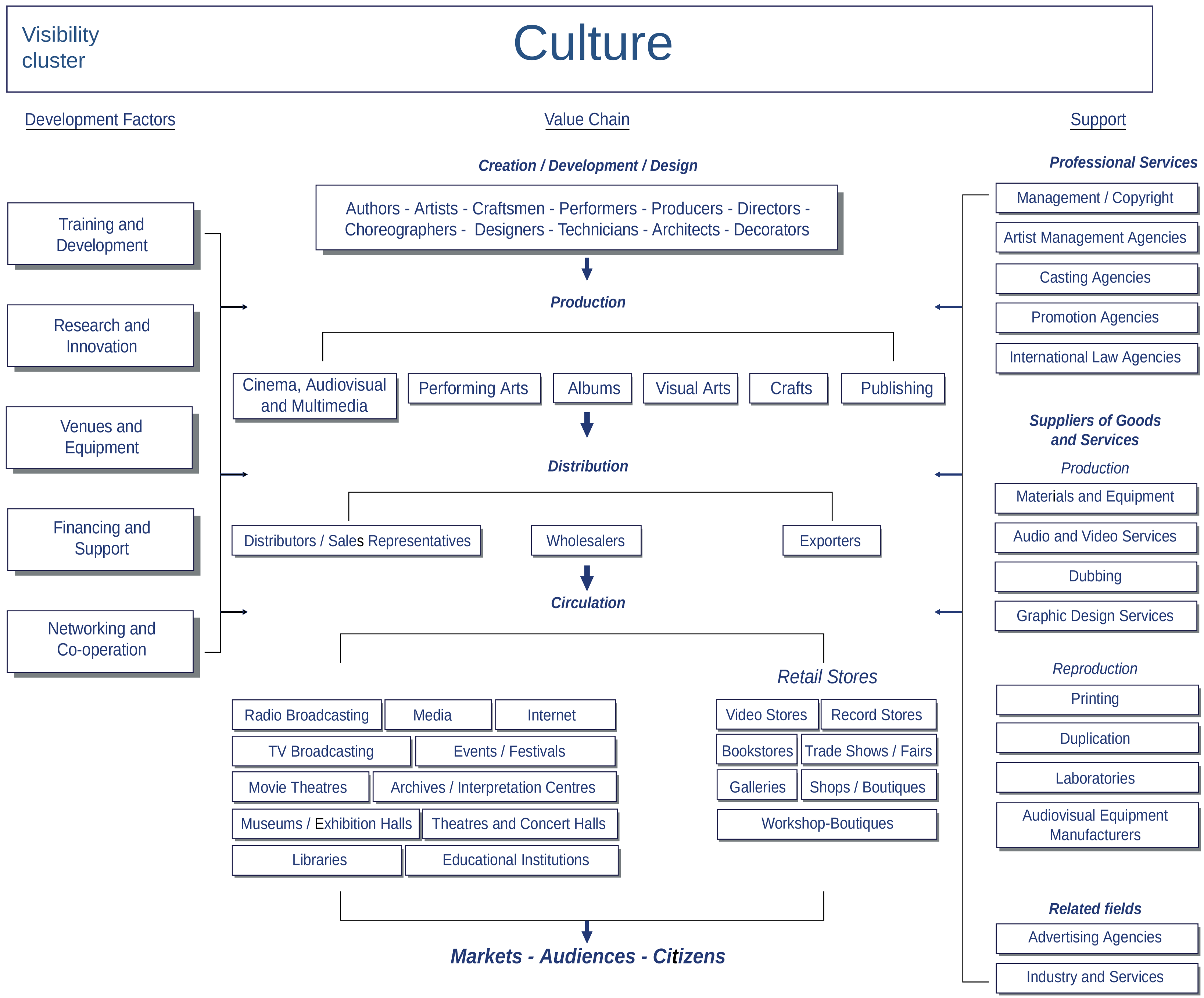
Main Statistics for Cultural Institutions and their Products in the Montréal CMA

	Number of businesses	Salaries, Benefits, Royalties: Value ($ bil)	Salaries, Benefits, Royalties: Montréal CMA share over all CMAs (%)	Salaries, benefits, royaties per person ($)
Film production, 2001-2002	229	206,472	34.9	60.3
Film post-production, 2001-2002	99	82,993	30.4	24.2
Film distribution, 2002-2003	69	32,085	20.9	9.4
Movie theatres, 2000-2001	59	22,958,650	17.7	6.7
Book publishers, 2000-2001 (# journals)	122	80,176	20.9	23.4
Journal and periodical publishers, 1998-1999	358	62,036	21.6	18.1
Sound recording, 2000-2001	108	32,591	19.5	9.5
Performing arts, 2001-2002	139	60,080	22.6	17.5
Heritage institutions, 1999-2000	127	68,379	1.,5	20.0

	Operating Revenue: Value ($ bil)	Operating Revenue: Montréal CMA share over all CMA (%)	Operating revenue per person	Rank in Canada (earnings) ($)
Film production, 2001-2002	489,236	21.1	142.8	2
Film post-production, 2001-2002	236,760	26,2	69.1	2
Film distribution, 2002-2003	335,957	10.4	98.1	2
Movie theatres, 2000-2001	141,234,306	16.9	41.2	2
Book publishers, 2000-2001 (# journals)	377,364	17.9	110.1	2
Journal and periodical publishers, 1998-1999	332,381	27.0	97.0	2
Sound recording, 2000-2001	138,661	11.6	40.5	2
Performing arts, 2001-2002	105,105	22.2	30.7	1
Heritage institutions, 1999-2000	129,916	12.3	37.9	4

Source: Statistics Canada, Culture Statistics Program

Configuration


Visibility
cluster
Culture
Development Factors
Value Chain
Support
Training and Development
Research and Innovation
Venues and Equipment
Financing and Support
Networking and Co-operation
Creation / Development / Design
Authors - Artists - Craftsmen - Performers - Producers - Directors - Choreographers - Designers - Technicians - Architects - Decorators
Production
Cinema, Audiovisual and Multimedia
Performing Arts
Albums
Visual Arts
Crafts
Publishing
Distribution
Distributors / Sales Representatives
Wholesalers
Exporters
Circulation
Radio Broadcasting
Media
Internet
TV Broadcasting
Events / Festivals
Movie Theatres
Archives / Interpretation Centres
Museums / Exhibition Halls
Theatres and Concert Halls
Libraries
Educational Institutions
Retail Stores
Video Stores
Record Stores
Bookstores
Trade Shows / Fairs
Galleries
Shops / Boutiques
Workshop-Boutiques
Markets - Audiences - Citizens
Professional Services
Management / Copyright
Artist Management Agencies
Casting Agencies
Promotion Agencies
International Law Agencies
Suppliers of Goods and Services
Production
Materials and Equipment
Audio and Video Services
Dubbing
Graphic Design Services
Reproduction
Printing
Duplication
Laboratories
Audiovisual Equipment Manufacturers
Related fields
Advertising Agencies
Industry and Services

Sub-Cluster

The Culture Cluster

Cultural Sectors
Cultural Chains

Cultural Sectors

The cultural sphere is generally deemed to be divided in three major albeit interrelated yet distinct sectors: arts and letters, cultural industries and heritage. This division is echoed in the organization of the Quebec system to support Culture and Communications:

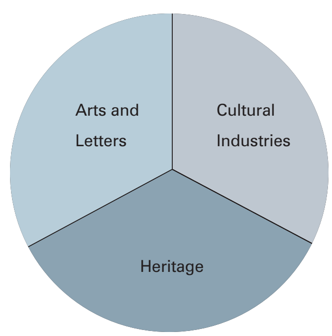
- The Conseil des arts et des letters du Québec (Quebec Arts and Letters Council – CALQ) supports artists and writers as well as organizations in the fields of visual arts, media arts, literature, theatre, dance and music, as well as creation in song, crafts, architecture and design.

- The Société de développement des enterprises culturelles (Cultural Business Development Corporation – SODEC) supports cultural industries (movie and television production, books and publishing, records and package acts, crafts).

- The Quebec Ministry of Culture and Communications offers programs to support heritage, museology, archives, conservation and libraries.

There are many interrelations among the activities of these three major sectors. Several disciplines such as crafts or literature are positioned somewhere between pure creation and mass production, while the works of artists or sculptors are placed in museums or contribute to our architecture and our environment.

Cultural Sphere



Sub-clusters chosen

The activities of the three major sectors are sub-divided into several fields. While the Observatoire de la culture et des communications (Culture and Communications Observatory) of the Institut de la statistique du Québec (Quebec Statistics Institute) proposes to divide cultural activities among 11 fields[10] we have chosen, for the purposes of this exercise and in order to bring out the ties that unite the related fields, to regroup these activities in six sub-clusters:

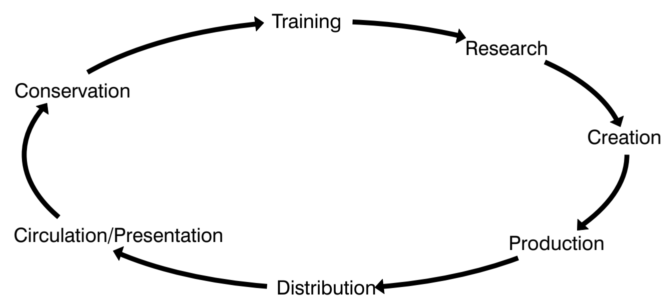
- Cinema, audiovisual and multimedia;
- Visual arts, media arts, crafts, design and architecture;
- Recording industry and package acts;
- Theatre and circus arts;
- Books and literature;
- Heritage and museology.

10 Visual arts, crafts and media arts/Performing arts/Heritage, museums and archive institutions/Libraries/Books/Periodicals/Sound recording/Cinema and audiovisual/Radio and television/Multimedia/Architecture and design.

Cultural Chains

Even though certain aspects differ from one discipline to another, the chosen sub-clusters may be represented using a chain that generally links the various functions of creation, production and distribution. We will however see that major elements appear or disappear depending on the specificities of each sub-cluster. Consequently there is not just one but several cultural chains.

Schematic Representation of a Cultural Chain



A cultural chain has been created for the six chosen sub-clusters, depending on the factors deemed relevant and their articulation. These various elements can be grouped into eight separate blocks that are more or less important depending on the sub-cluster being considered:

- **The development factors** are made up of six elements: training and continued professional development, research and innovation, venues and equipment, financing and support, networking and collaboration.

- **Creation,** which is at the basis of each of the chains, includes the work of authors, composers, artists, craftspeople, performers, producers, directors, choreographers, designers, architects, decorators.

- **Production** constitutes the heart of the cultural process in the fields of cinema and audiovisual, multimedia, performing arts, records, books, visual and media arts, and crafts.

- **Distribution** includes the activities of distributors, representatives, wholesalers and exporters.

- **Circulation/Presentation** is an activity that includes a huge variety of vehicles: radio broadcasting, television broadcasting, medias, Internet, events and festivals, cinemas, theatres, exhibition centres, museums, performance centres, archive centres, libraries, bookstores, record stores, video clubs, boutiques, workshop boutiques, galleries, trade shows and fairs.

- **Professional services** include activities for managing copyright and related rights, managing artists as well as casting agencies, promotion and international legal services.

- **Goods and services providers** include suppliers in production (materials and equipment, audio and video services, dubbing, sub-titling, translation, graphic services) and suppliers in terms of reproduction (printing, copying, laboratories, audiovisual support manufacturing).

- **Related fields** include in particular advertising/publicity agencies and industry and services sectors.

Methodological difficulties encountered

Before beginning the presentation of the chosen sub-clusters, it is important to stress that any comparison between these sub-clusters or, to an even greater extent, their economic impacts, involves a certain number of difficulties.

First of all, there are very few studies that analyze the cultural sector on the scale of the Montréal Metropolitan Community territory. Most of the studies break the territory down into the five administrative regions in whole or in part within the CMM (Montréal, Laval, Laurentians, Lanaudière and Montérégie). It is therefore difficult to obtain a precise image of what culture represents on solely the metropolitan scale. To our knowledge, only the studies by David Coish for Statistics Canada carried out in 2004 and those by Albert Juneau for the Bureau de la Statistique du Québec in 1998 are an exception to the rule.[11]

Secondly, economic importance is much less well documented for certain fields than for others. While many studies deal in particular with cultural industries, and particularly with cinema and audiovisual, little data is available with respect to visual arts and heritage, despite the efforts recently deployed since the implementation of the Observatoire de la Culture et des Communications du Québec.

11. Census Metropolitan Areas as Culture Clusters, Trends and Conditions in Census Metropolitan Areas, Analytic Document. David Coish, Statistics Canada – Culture, Tourism and the Center for Education Statistics, October 2004.
Impact économique des activités du secteur de la culture des cinq régions du Montréal métropolitain et de la région de l'île de Montréal [Economic Impact of the Culture Sector in Five Metropolitan Montréal and Island of Montreal Areas], Albert Juneau, Bureau de la Statistique du Québec, December 1998

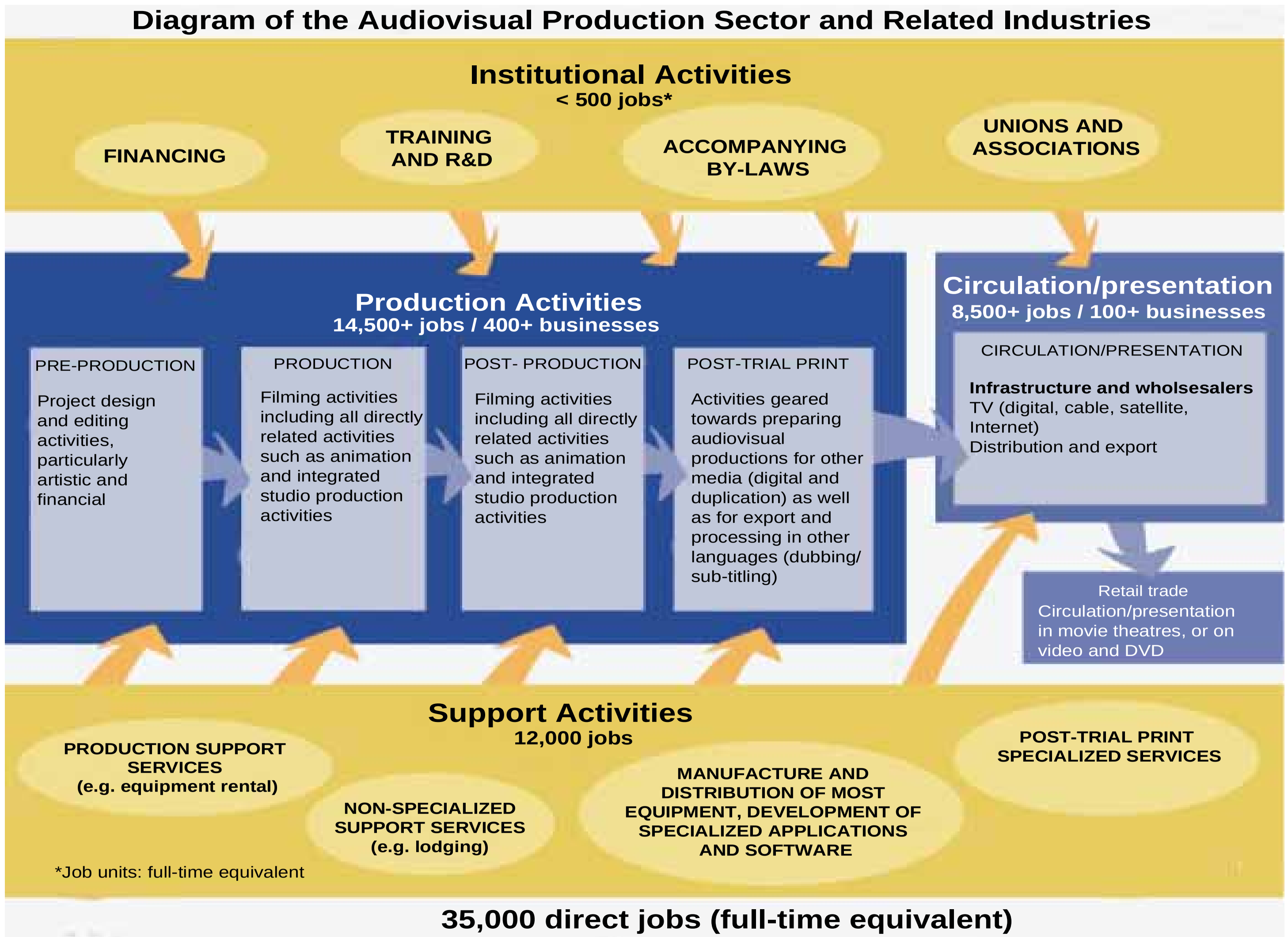
Sub-Cluster

Cinema, Audiovisual and Multimedia

Strengths and weaknesses observed

1. A dynamic network
2. An innovative multimedia sector
3. Well-recognized technical training
4. Film sites could be used more profitably
5. A well-supported field
6. Exemplary cooperation among players

Sub-cluster – Cinema, Audiovisual and Multimedia*



* The above diagram is that of the Forum metropolitain de l'industrie cinématographique (Metropolitan Forum for the Cinematography Industry), and has been agreed-upon by sector players. The multimedia sector will be added eventually.

A Dynamic Sector

The film and television industry generates 35,000 direct jobs in Quebec (full-time equivalent). The total wage bill is $1.38 billion per year. The Montreal metropolitan region has 64% (i.e., 22,400) jobs and 75% of the 500 establishments related to this industry.12 This employment level places audiovisual right after aeronautics and before the sectors of printing, computer products manufacturing and biopharmaceuticals. By its concentration, ramifications and size, it constitutes a sizeable economic sector, as was shown by the Forum metropolitain de l'industrie cinématographique (Metropolitan Forum for the Cinematography Industry) held in Montréal on November 29, 2004. There are three dynamic components that can be distinguished in this industry: domestic production, co-production and foreign production, in addition to the related industry of multimedia.

Quebec's movie production represents 83% of the total annual value of productions produced in Quebec. This proportion has grown an annual average of 10% in recent years. Local film production has been growing in leaps and bounds in box office popularity since 2001. However, despite this success, any growth in domestic production must follow demand on the French-speaking market and the limited domestic market. That is why hosting foreign productions and co-productions is a non-negligible source of growth.

Foreign film production has seen many ups and downs since its appearance in the 1990s. In 2003, Quebec – and mainly the Montréal metropolitan region – has hosted 12% of foreign productions filmed in Canada. This influx of funds has made it possible for local industry to invest in new technologies, thereby consolidating and enhancing its competitive edge. However, the number of foreign productions filmed in Montréal suffered a major downturn in 2004. It seems that the higher Canadian currency as compared to the US dollar, as well as stronger competition from other provinces such as Manitoba or other countries such as Eastern Europe, are the main factors responsible for this downturn.

However, **co-production** by Quebec firms with foreign firms has more than doubled since the early 1990s. The average has grown from 20 co-productions per year in 1990, to 45 in 2001. International agreements with companies from 21 countries including the United Kingdom, France and Australia, make it possible for the local producers to carry out major projects, promote international distribution, and provide an influx of funds into the local economy. The international success of The Barbarian Invasions falls under this category.

12 The data and statistics from this section are from several documents and studies produced at the Forum métropolitain de l'industrie cinématographique held in Montréal in November 2004. See in particular the following documents: Une filière d'envergure, la production, audiovisuelle et les industries connexes dans la région de Montréal et au Québec [A Substantial Sector: Audiovisual Production And Related Industries in the Montréal Region and the Province of Quebec]. E & B Data, March 2004; Étude de positionnement de l'industrie du cinéma au Québec, les tournages américains : bilan, perspectives, strategies [Quebec Movie Industry Positioning Study: Filiming American Movies – Balance Sheet, Outlook, Strategies]. Jacques Grysole, Expansion Stratégies inc., November 2004; Impacts économiques des tournages étrangers au Québec [Economic Impact of Foreign Filming in Quebec]. E & B Data, November 2004. See also film industry statistics from the Institut de la statistique du Québec, 2004 edition.

The **multimedia** sector includes more than 275 companies that employ 3,500 people (2003). The video game niche market alone mobilizes at least 40 companies (1,300 jobs). This sector is experiencing strong growth. In Canada, video game sales reached $388 million in 2003, an increase of 28% since 2002. The metropolitan region has several major contract originators such as BCE (a Bell subsidiary), Québécor, Groupe Transcontinental, Vidéotron, Malofilm and Coscient. The metropolitan region has also seen the emergence and development of Softimage which is today part of the American giant Microsoft. Several large and important businesses have also chosen to settle here: Discreet and Kaydara in software production, as well as the world leaders A2M (Artificial Mind and Movement), Microïds, Jam Dat, Sarbakan, Ubisoft, Electronic Arts in the development sector.

In addition, it would be interesting to include in this sub-cluster, in the framework of an ulterior work aimed at following up on this portrait of Montréal metropolitan region's cultural industry, the creation and production activities destined for **radio broadcasting.** Radio broadcasting is another dynamic creation sector that is dealing with a certain number of issues. Among others we observe that in the past few years there has been a trend towards concentrated ownership that could inhibit the diversity of the forms of expression, despite the Canadian legislative framework. Although radio is still the media sector where there is the least concentration of capital, all that could change with the convergence of the audiovisual, computer and telecommunications sectors.

The Culture Chain

The film and television industry includes activities related to productions destined for the general public in the form of film, video, large format, high definition, shows, commercials, video clips and DVD, to which are added related industries of television broadcasting, technical and specialized services, software, training, financing and equipment. For the purposes of this document, we will also add multimedia sector activities to that category.

This culture chain can be broken down into eight components:

Pre-production (or development) is the first link in the chain. This is a phase that constitutes the critical stage during which an idea becomes a scenario and is carried through until production. This is the creation, program-making and project setup phase, from both the artistic (screenwriter) and financial points of view.

Production as such concerns filming and all other directly related activities. According to Statistics Canada, there were 229 production companies in the Montréal metropolitan region in 2001-2002. There are 105 members of the Association des producteurs de films et de télévision du Québec (Quebec Film and Television Producers Association) located on CMM territory, mainly concentrated in the downtown area of Montréal. Among them, 27 have a mixed cinema-television vocation while 52 are exclusively devoted to the television sector, 13 to the film sector, and 11 to the commercial production sector.

The **post-production** stage includes all processing activities (editing, image processing and sound) just before going on to the post-trial print phase, aimed at preparing audiovisual productions for other media (digitization and duplication), for export and processing in other languages (dubbing and subtitling). The metropolitan region has 99 companies operating in these two stages of the chain.

Distribution is the intermediary between the producers and the various windows for broadcasting. The metropolitan region has 24 distributors, who are the cornerstone of the filming and audiovisual process, knowing that production depends on their agreement and to a lesser degree on their financing. Distributors pay particular attention to export.

The **circulation/presentation** aspect includes the activities of television broadcasting (digital airwaves, cable, satellite, Internet), presentation in venues (movie theatres, drive-ins) which is mainly the domain of the major American chains, the sale and rental of video cassettes and DVDs, and finally the festivals. We note in this regard that the many festivals and major cinema events contribute greatly to the circulation/presentation aspect and are for the city an excellent means to show its openness to diversity and its interest in various cultures.

Throughout this chain there are support activities and institutional activities. **Institutional activities** are defined as financing, training, research, regulation and accompaniment, as well as representation activities. **Support activities** include specialized or non-specialized production support services (for example, equipment or premises rental) and a post-trial print as well as manufacturing and distribution of goods and the development of applications and software. We should note on this last point the importance of the software industry and multimedia industry that strongly contribute to the reach of the Montréal metropolitan region abroad with exports representing more than 50% of this industry's activities. For example, the world's best production softwares were developed in Montréal by Discreet, Softimage or Kaydara. The video game industry also has seen fantastic growth that should continue. The PriceWaterhouse firm predicts that these expenses will reach $35.8 billion US in 2007, which is a leap of nearly $15 billion in five years.

Development Factors

Research and innovation

Various research and innovation initiatives have put in place to make it possible to to try out and explore new avenues. Among such initiatives are those by patron of the arts Daniel Langlois: the Daniel Langlois Foundation for Arts and Sciences, Ex-Centris Complex, as well as the Daniel Langlois Foundation Chair at the Concordia University Faculty of Fine Arts whose mandate is to promote development of research in areas where fine arts meet computer science.This chair also plays a role in driving the development of a research centre focused on artistic production based on computer applications.

Also worthy of note are the Society for Arts and Technology (SAT) and Hexagram, a research and creation institute for media arts and technologies, newly created by the merger of Concordia University's Medialab and UQAM's Institut des nouveaux medias (New Media Institute).

Training and continued professional development

The Montréal region is a pioneer in digital film and software development, and is reknowned world-wide for its skills in animation and visual effects. Software tools designed here contribute to the success of major US film productions. With this reputation, technicians and professionals trained by Quebec institutions are increasingly highly sought after. However, precarious employment conditions for part-time or contractual workers, the cyclical nature of activities, and the labour turnover do not encourage the professional development of these craftspeople.

Several general and technical training programs in film and television are offered by specialized schools in the metropolitan region (National Animation and Design Centre or Centre NAD), Institut national de l'image et du son), by Cégeps (Saint-Laurent, Montmorency, Collège Lasalle) and by universities (UQAM, Concordia, Université de Montréal).

Groups such as the Syndicat des techniciennes et technicians du cinéma et de la video du Québec (STCVQ or the Quebec Video and Film Technicians Union) and the Association des producteurs de films et de télévision du Québec (APFTQ or the Quebec Film and Television Producers Association) also offer training and continued professional development programs as well as internships in cooperation with businesses. Some of these programs target young people who wish to have a career in the field.

Venues and equipment

The wave of foreign productions that unfurled in the metropolitan region in the course of recent years has promoted the implementation of numerous infrastructures. The region can now count on quality facilities, including 13 film studios (37,000 square feet) built at the Cité du Havre and at the Cité du cinéma located in the Technoparc, and the vast sound stages at Ciné-Cité in Longueuil (Saint-Hubert).

Today, new projects are being developed to keep in step with market evolution. Film production infrastructures have changed from a quasi monopoly situation to a market situation, in a relatively short period of time, which has obviously had an effect on the way the industry functions, on competition and on market supply and demand.

Financing and support

Several financial support and tax credit programs are offered to producers by the various government levels. At the federal level, Telefilm Canada sponsors several funds and programs, such as the Canada Feature Film Fund, the Development Production and Marketing Program, the Canadian Television Fund and the Equity Investment Program. The Canada Council for the Arts offers subsidies to film and video artists, as well as to new media artists. Producers also get federal tax credits for Canadian film or video production. This program is administered by the Canadian Audiovisual Certification Office (CAVCO) in collaboration with the Canada Revenue Agency (CRA). CAVCO also provides administrative support with respect to this program.

In Quebec, the tax credits program is administered by SODEC (Société de développement des enterprises culturelles, a cultural business development corporation). SODEC also offers a range of support programs to young creators for script writing, production, promotion and broadcasting as well as for export and cultural outreach. This corporation has greatly contributed to establishing the Fonds d'investissement de la Culture et des Communications (FICC or culture and communications investment fund), that invests a major part of its funds in the audiovisual sector, and it has also set up or Financière des enterprises culturelles du Québec (FIDEC or Quebec cultural business financier), whose mission is to offer financing tools to cultural enterprises so they can win international markets, whether it be in the area of film, television, major shows or artists' career development. SODEC is also the home of the Bureau d'accueil des producteurs étrangers (BAPE or foreign producers' reception bureau) and manages the tax credit program for foreign productions which was just increased to 20% in January 2005.

Among these support and intervention organizations, let us first mention the work of the various local or regional film and television offices, among which are the Montréal Film and Television Commission (MFTC), which has been an integral part of the Economic and Urban Development department of the City of Montréal since 1979. Its mandate is to coordinate filming in its territory, while promoting the city in order to encourage foreign producers to produce their films and television series here.

Audiovisual also has the support of the private sector, including the Harold Greenberg-Astral Media Fund, the Bell Broadcast and New Media Fund, and the Cogeco Program Development Fund.

A large number of organizations participate in the development of this sub-cluster and look out for the interests of its various stakeholders. Their role is essential, whether it be to facilitate production financing procedures, monitor sector regulations or promote the industry.

In this spirit, the main recommendation adopted by the recent Forum metropolitain de l'industrie cinématographique (Metropolitan Forum for the Cinematography Industry) was to set up a new (not-for-profit) independent organization, whose mandate would be to assist, promote and develop the industry. The organization would have the dual function of serving as a foundation for the development activities of the audiovisual sector and posing the concrete actions related to encouraging foreign producers to shoot their films here, and promoting the metropolitan region as a major production site.

Networking and issue tables

Numerous associations and consortiums bring their support to the industry, beginning with the Association des producteurs de films et télévision du Québec (APFTQ). Let us also mention specialized unions and professional groups such as the Syndicat des techniciens et techniciennes du cinéma et de la video du Québec (STCVQ), the Union des artistes (UDA), the Association des professionnels en video du Québec (APVQ), the Association québécoise des agents artistiques (AQAA), the Association des réalisateurs et réalisatrices du Québec (ARRQ) and the Directors Guild of Canada, that are all associations and organizations that stand up for the professionals active in this sector. The Association des fournisseurs de services techniques and Quebec AnimFX work on the development of the industry according to expressed needs. In addition, the Montréal Giant Screen Consortium aims to deploy the industry's large format cinema rersources.

We must note the remarkable collaborative effort in the film sector as demonstrated by the Forum metropolitain de l'industrie cinématographique (Metropolitan Forum for the Cinematography Industry) held in Montréal in November 2004. This event made it possible to identify priorities and development objectives for the audiovisual sector, establish a common strategy, define an action plan, create an implementation committee for the action plan and choose mutually agreeable structuring projects.

In multimedia, the Alliance numériQC association has 238 member companies and organizations. More than 75% of its members are from the private sector. Its mission is to support and accelerate digital production in Quebec. It also looks after developing knowledge and skills and represents industry interests to government authorities.

Some Figures

Movie and Television Production By Province

	1997/98	1998/99	1999/00	2000/01	2001/02	2002/03	2003/04	Share	Growth over one year	Average Growth five years
				(Millions of dollars)						
Ontario	1,230	1,551	1,749	1,850	1,905	1,948	1,758	36%	-10%	3%
British Columbia*	590	856	1,086	1,178	1,183	1,146	1,542	31%	35%	13%
Quebec	**963**	**1,188**	**1,295**	**1,246**	**1,218**	**1,406**	**1,206**	**25%**	**-14%**	**0%**
Other provinces	256	409	485	455	425	528	416	8%	-21%	0%
Total	3,037	4,004	4,614	4,728	4,732	5,028	4,922	100%	-2%	4%

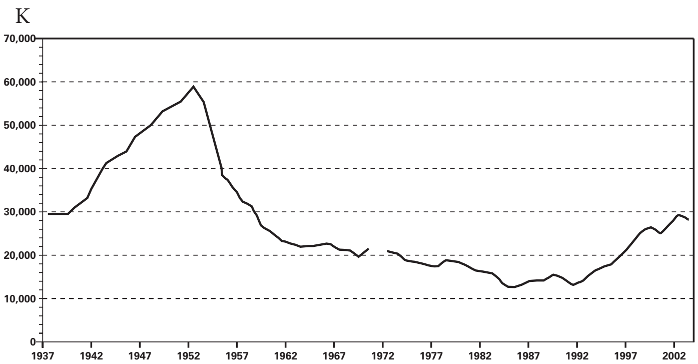
* Includes the territories. N.B.: Certain amounts may not correspond to totals indicated as figues have been rounded. As well, various agencies also compile their own statistics on the movie and TV industries in their province, using the taxation and marketing data they have available to them. These statistics may differ from those given here due to differences in the time of year (fiscal versus calendar year) and the accounting made of production activities according to the location where associated expenses were spent (i.e inside or outside the province).
Source : Estimates based on CAVCO, CRTC, CBC-SRC data and that of the Association of Provincial Funding Agencies.

Employment in Quebec's Audiovisual Sector

	Employment in Quebec
Production	14,500
Support	12,000
Institutional activities	500
Circulation/presentation	8,500
Total	35,000

Source: E & B Data, 2004

Movie attendance[1], Quebec, 1937-2003



1. There was no study done in 1971

Sources: Statistics Canada (63-207), from 1937-1974
Institut de la statistique de Québec, Observatoire de la culture et des communications du Québec, Enquète mensuelle auprès des salles de cinéma et des cinéparcs [Monthly Survey of Movie Theatres and Drive-Ins], 1975 to 2003.

Average number of movie theatres[1], drive-ins, screens and seats per year in Quebec, 1998-2002

	1998	1999	2000	2001	2002	Average Annual Change
			n			%
Establishments	136	139	137	130	132	-0,7
Movie theatres	116	119	120	116	118	0,4
Drive-ins	20	20	17	14	14	-8,5
Screens	587	641	718	753	773	7,1
Movie theatres	547	602	683	722	743	8,0
Drive-ins	40	39	35	31	30	-6,9
Seats[2]	114,989	124,000	139,295	146,928	152,316	7,3

1. Average from monthly data compiled driving the year.
2. These data apply only to movie theatres.
Source: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec, Film Industry Statistics. 2003 edition.

Operating Results of Movie Theatres and Drive-ins, Quebec, 1998-2002

	Unit	1998	1999	2000	2001	2002	Average Annual Change %
Projections	#	640,897	723,801	816,295	878,473	923,755	9.6
Attendance	'000s	26,142	27,309	25,729	27,746	29,942	3.5
Box office sales	$mil	134.6	146.1	146.9	166.0	183.5	8.0

Source:Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec, Film Industry Statistics, 2003 edition.

Main Private Television Network Statistics, Quebec, 1990-2002

	Unit	1990	1998	1999	2000	2001	2002
Reporting Units	#	26	27	29	28	28	27
Operating Revenue	$mil	329	409	424	439	447	450
Employees (weekly average)	#	2,318	2,065	2,028	2,066	2,194	2,153

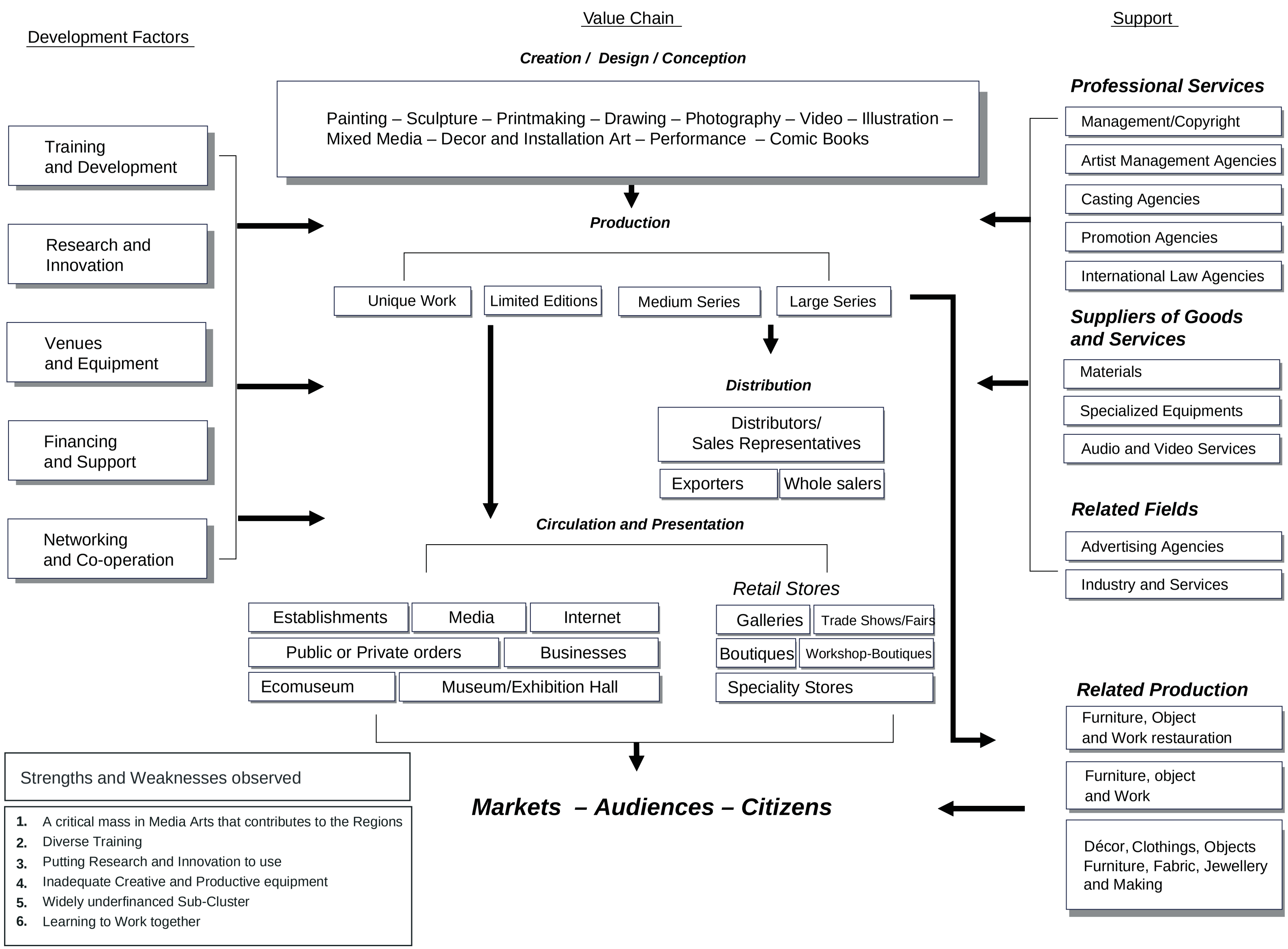
Source: Statistics Canada, Radio-television and Telecommunications (56-001-XIF, 56-204 and CANSIM 357-0001). Compiled by: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec.

Sub-Cluster

Visual Arts and Media Arts

Dynamic Sectors That Contribute to the Region's Outreach
The Cultural Chain
Development Factors

Sub-Cluster- Visual Arts and Media Arts



Dynamic Sectors That Contribute to the Region's Outreach

Visual arts include painting, sculpture, printmaking, photography, drawing, illustration, mixed media, decor and installation art, comic books and performance. In Quebec there are 3,207 artists working in visual arts; half are painters, followed by sculptors. Nearly 65% of artists working in visual arts living in Quebec live in the Montréal metropolitan region; of those, 47% live on the island of Montréal.[13] There are numerous exhibition spaces in the metropolitan region not only in museums but especially in cultural centres, artists' centres, and private galleries. As proof that the Montréal art market is active and interesting, two prestigious auction houses, Ritchies of Toronto and Heffel of Vancouver have recently opened offices in Montréal. In doing so, they join three companies that are already well-established here: the Hôtel des Encans, Empire and Pinneys.

The **media arts** sector is defined by the research and creation of artworks or experimental artworks in the fields of film, video and new media. New media is basically the artistic use of communication and information technologies, whether they be computer, electronic, digital, sound, interactive or web-based technologies. As we saw in the section on audiovisual, the media artists' colony has fostered the new media industry that has strongly contributed to Montréal's reach abroad.

The Cultural Chain

The **creation/production** duo is at the very heart of this field. The creative act is the basis for everything, since it includes all the stages of research, design and production of the unique work of art. Sometimes, it is even related to the circulation/presentation aspect, especially in self-managed artist centres that are not only sites for creation and production, but for circulation and presentation as well. There are 26 artists' centres in the Montréal region. They are managed by artists and mostly subsidized. In 2001, artist centres received a total of $9.5 million in government assistance and $600,000 in private assistance, had 352,000 visitors and achieved independent income of $2.7 million. For the same amount of subsidies, Montréal's artist centres make more sales and receive more private assistance than regional centres. Also, in Montréal there are several artist studios that receive a subsidy applied to property tax.

13. Data and statistics of this section come from Statistiques principales de la culture et des communications au Québec [Main Culture and Communications Statistics in Quebec], Observatoire de la Culture et des Communications du Québec – Institut de la statistique du Québec, 2004 edition; Déchiffrer la culture au Québec, 20 ans de pratiques culturelles [Deciphering culture in Quebec – 20 years of cultural practices]. Ministère de la Culture et des Communications du Québec, Les Publications du Québec, 2004. For crafts, see also: Les métiers d'art au Québec, esquisse d'un portrait économique [Crafts in Quebec, Sketch of an economic profile], SODEC, November 2

There are numerous sites for **circulation and presentation,** including 83 private galeries on CMM territory. Cultural centres, municipal galeries and exhibition halls constitute an essential network of resources where contemporary visual artists and craftspeople can make their work known. There is also the Centre d'art contemporain de Montréal that holds a "Biennale" celebrating contemporary art. In addition, the Society for Arts and Technology (SAT) and the Montreal International Festival of New Cinema offer a showcase for the creations of Quebec's media artists and contribute to Montréal's reputation in the field.

Precisely assessing the art market is not easy. However, here are a few figures that give some idea of its size. In 2001-2002 in Québec, 22 companies that acquire art on a regular basis purchased 732 works of art for a total value of $5.7 million. The same year, museums spent $5.4 million to purchase 581 works of art. Finally, under the Politique d'intégration des arts à l'architecture et à l'environnement (Policy to integrate art into architecture and the environment), commonly known as the «1% Policy», 97 orders from the Quebec public and para-public sectors were filled, half of which were for sculptures. The bill was $2.8 million. In total that makes $14.5 million paid to artists by these various establishments in 2000-2001. Still in 2001, artists' centres for visual arts and media arts supported by the Quebec Conseil des arts et des lettres have declared independent income of $2.7 million, which comes mostly from art sales or rentals.

That adds up to around $17 million, which is still far from representing the entire market. That figure does not include acquisitions made by companies and organizations who do not possess any collections but who nevertheless purchase art as gifts or to commemorate special events. There are also sales to individuals that reach into the millions. A statistical study in 1999 by the Quebec Institut de la statistique showed that 6% of the people who visited an art gallery made a purchase. That means at least 75,000 sales on that circuit alone. Also, with the growing number of art circuits, the market for direct sales by artists has also grown considerably in recent years.

Development Factors

Training and continued professional development

In the field of visual arts, nine Cégeps located in the CMM offer pre-university fine arts courses. The Marie-Victorin, Montmorency and Old Montréal Cégeps also offer mixed programs in fine arts and natural sciences or fine arts and human sciences. The four Montréal universities also award diplomas in art history. In addition, the Faculty of Fine Arts at Concordia University and the École des arts visuals at the Université du Québec à Montréal both offer fine arts and media arts degrees. Programs offered by Concordia University include in particular ceramics, fibre arts, painting, drawing, photography, printmaking and sculpture. A Women and Fine Arts module is also offered. The École des arts visual et médiatiques at UQAM offers training in drawing, painting, sculpture, printmaking, photography, videography and robotics. The university also teaches art education. Both institutions place an emphasis on interdisciplinary studies and integrating new medias.

Several university programs in media arts are available. The Department of Design Art at Concordia University, the Centre de recherche interdisciplinaire sur le technologies émergentes at the Université de Montréal and the Département des communications at the Université du Québec à Montréal all offer course programs in multimedia and in media arts. Several computer programs are also available in the universities, Cégeps or specialized schools, including the Centre NAD and the ICARI school. In addition, we should mention the specific contribution by the Quebec Ministry of Education concerning the teaching of 2D and 3D.

Research and innovation

Visual arts and media arts are based on research and exploration. That is the only way to stand out and become known. It is also on this basis that artists are evaluated by the subsidizing organizations and the venues that will help them to solidify their career. Consequently, the Montréal metropolitan region has several sites to promote experimentation.

Let's take the example of media arts. In addition to being able to count on a critical mass of artists and cultural organizations operating in the various disciplines related to new information and communication technologies (NICT) – a critical mass that contributes, at the same time, to the development of new products (interfaces, sensors, software) – the Montréal metropolitan region can in particular rely on experimentation sites such as provided by the Société des arts technologiques (SAT) and Oboro Goboro. In addition, in order to consolidate Montréal's strategic position on the international scene, Valorisation recherche Québec (VRQ) has supported the implementation of Hexagram, digital arts and technologies research and creation institute affiliated with Concordia University and UQAM.

Sites and equipment

The Montréal metropolitan region is well-supplied with circulation/presentation venues. On the Island of Montréal there is, for example, a network of 26 cultural centres that are well-distributed throughout the various boroughs. Some neighbouring cities also have municipal or institutional galleries and exhibition centres. With respect to private circulation/presentation sites, several artist centres and private galleries (sometimes called commercial galleries) have been inventoried. A number of museums including the Museum of Contemporary Art and the Montréal Museum of Fine Arts, also offer a prestigious showcase for artists.

However, it is the creation/production sites that are in poor supply. The network of artists' studios has in particular been weakened by the Montréal real estate boom which has caused the destruction or reconversion of numerous buildings, along with high rent increases.

Financing and support

The Quebec government supports creators through the Conseil des arts et des lettres du Québec (CALQ), which supports research, experimentation, creation, production and circulation/ presentation in visual arts and the media arts.

The Canada Council for the Arts (CCA) is the federal government's main financing organization. It provides direct subsidy programs to artists (career, research, artist-in-residence and foreign internship grants) as well as support programs for organizations and artist-run centres. The assistance applies to the operation or achievement of particular projects. The federal government also supports circulation/presentation in the field of visual arts and media arts through Canadian Heritage.

Montréal's cultural associations and organizations can also apply to the Conseil des arts de Montréal.

Networking and collaboration

The field of visual arts and media arts is a true mosaic. Artists form groups according to their field of activities and their particular artistic interests, but also in a more general manner to gain greater leverage. The Regroupement des artistes en arts visuals du Québec is a good illustration of this desire.

The production or circulation/presentation organizations also have created ties among themselves and through networks such as the Regroupement des centres d'artistes autogérés du Québec and the Association des galleries d'art contemporain de Montréal. We also should add that the Quebec Council for Media Arts has existed as a network of independent artists since 1999.

Some Figures

Main Disciplines Practiced by Visual Artists in Quebec, 2000[1]

All artists[2]	**100.0**
No declared field (multi-disciplinary artists)	25.4
Artists practising one or more main disciplines	74.6
Discipline declared as being main or one of main disciplines practiced[3]	
Painting	50.0
Sculpture	21.8
Drawing	19.5
Installation art	15.9
Photography	15.0
Engraving / Printing	8.0
Illustration	6.5
Public art	4.3
Video	4.0
Computer graphics design	3.8
Textile art	3.0
Performance art	2.8
Multimedia	2.6
Holography	0.3
Other disciplines	8.0

1. Figures from a study of 3,207 visual artists.
2. Respondents were asked which discipline(s) they considered to be their main discipline. Respondents could check off as many main disciplines as they liked (or none at all).
3. Disciplines are in order of percentage checked by respondents (among those who said they had one or more main disciplines).

Source: BELLAVANCE, Guy, BERNIER, Léon et LAPLANTE, Benoît. INRS (2001). Les conditions de pratique des artistes en arts visuels. [Conditions of Practice of Visual Artists]. Montréal, Regroupement des artistes en arts visuels du Québec. 160 p.

Income earned from the practice of visual arts by visual artists in Quebec, 1999[1]

	%
None	12,3
$1 - $999	12,3
$1,000 – $3,499	24,9
$3,500 – 9,999	20,5
$10,000 – 19,999	14,1
$20,000 – 29,999	6,3
$30,000 or more	9,6

1. Figures from a study of 3,207 visual artists.

Source: BELLAVANCE, Guy, BERNIER, Léon et LAPLANTE, Benoît. INRS (2001). Les conditions de pratique des artistes en arts visuels. [Conditions of Practice of Visual Artists]. Montréal, Regroupement des artistes en arts visuels du Québec. 160 p.

Individual exhibition venues for visual artists, Quebec 2000[1,2]

	%
Maison de la culture and other culture centres, municipal galleries, libraries	50
Private galleries	46
Other public or commercial sites (bars, restaurants, boutiques, etc.)	38
Self-managed artists' centres	37
Personal workshop or rented space	32
University or Cégep gallery	30
Art museum or equivalent exhibit centre	30
Event with selection committee (biennial, symposium)	23
Event without selection committee	17
Other type of permanent circulation/presentation venue	16
Other type of museum	10
No response	13

1. Figures from a study of 3,207 visual artists.
2. Venues are ordered according to the percentage of artists having already exhibited at each site.

Source: BELLAVANCE, Guy, BERNIER, Léon et LAPLANTE, Benoît. INRS (2001). Les conditions de pratique des artistes en arts visuels. [Conditions of Practice of Visual Artists]. Montréal, Regroupement des artistes en arts visuels du Québec. 160 p.

Group exhibition venues for visual artists, Quebec 2000[1,2]

	%
Maison de la culture and other culture centres, municipal galleries, libraries	50
Event with selection committee (biennial, symposium)	47
Private galleries	42
Art museum or equivalent exhibit centre	42
University or Cégep gallery	40
Self-managed artists' centres	34
Event without selection committee	30
Other public or commercial sites (bars, restaurants, boutiques, etc.)	28
Personal workshop or rented space	22
Other type of permanent circulation/presentation venue	14
Other type of museum	13
No response	14

1. Figures from a study of 3,207 visual artists.
2. Venues are ordered according to the percentage of artists having already exhibited at each site.

Source: BELLAVANCE, Guy, BERNIER, Léon et LAPLANTE, Benoît. INRS (2001). Les conditions de pratique des artistes en arts visuels. [Conditions of Practice of Visual Artists]. Montréal, Regroupement des artistes en arts visuels du Québec. 160 p.

Artwork purchased by collecting establishments, by type of vendor, Quebec, 2002-2003

	Collector Businesses[1]		Major Cities[2]		1% Policy[3]		Museum Institutions[4]		All Establishments		
	#	$	#	$	#	$	#	$	#	$	%[5]
Establishments[6]	23		4		112		33		172		
Works purchased	442	1,788,407	18	1,049,800	122	3,835,663	722	2,563,496	1,304	9,237,366	100.0
From artist-producers	162	257,140	8	1,049,800	122	3,835,663	391	590,475	693	5,733,078	62.1
From art merchants	196	1,399,293	0	0	0	0	79	1,776,121	275	3,175,414	34.4
From other vendors[7]	84	131,974	0	0	0	0	252	196,900	336	328,874	3.6
Average price of works purchased		4,046		58,322		31,440		3,551		7,084	
From artist-producers		1,587		58,322		31,440		1,510		8,273	
From art merchants		7,139						22,483		11,547	
From other vendors[7]		1,571						781		979	

1. Category includes only businesses that own a collection and that are known for acquiring art on a regular basis. Includes corporations.
2. Major cities with art acquisition policies. Data excludes acquisitions made by museum institutions in these cities as well as acquisitions made under the Politique d'intégration des arts à l'architecture et ą l'environnement (Policy to integrate art into architecture and the environment).
3. Artwork purchased by public or government agencies under the Politique d'intégration des arts ą l'architecture et à l'environnement (Policy to integrate art into architecture and the environment or 1% Policy) managed by the Ministère de la Culture et des Communications.
4. Includes only establishments likely to acquire art on a regular basis. Includes art libraries.
5. Distribution of purchase values (not number of works).
6. Note that some establishments surveyed for the Enquête statistique sur les acquisitions d'œuvres d'art au Québec (Statistical survey of art acquisitions in Quebec) may have acquired no art in 2002-2003.
7. Individuals, estates, charity auctions, etc.

Source: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec, Enquête statistique sur les acquisitions d'œuvres d'art au Québec [Statistical survey of art acquisitions in Quebec].

Artwork purchased by collecting establishments[1], by art discipline, Quebec, 2002-2003

	#	$	%[2]
Establishments[3]	172		
Works purchased	**1,304**	**9,237,366**	**100.0**
Paintings	209	2,620,194	28.4
Art on paper	830	894,519	9.7
Sculptures	40	269,991	2.9
Installation art	29	278,819	3.0
Crafts	21	59,944	0.6
Public artwork	157	5,013, 644	54.3
Other disciplines	18	100,255	1.1
Average price of works purchased		**7,084**	
Paintings		12,537	
Art on paper		1,078	
Sculptures		6 750	
Installation art		9,614	
Crafts		2,854	
Public artwork		31,934	
Other disciplines		5,570	

1. Category includes only businesses that own a collection and that are known for acquiring art on a regular basis, major cities with art acquisition policies, establishments having purchased art under the Politique d'intégration des arts à l'architecture et à l'environnement managed by the Ministère de la Culture et des Communications, and museum institutions that acquire art on a regular basis.
2. Distribution of purchase values (not number of works).
3. Note that some establishments surveyed for the Enquête statistique sur les acquisitions d'œuvres d'art au Québec (Statistical survey of art acquisitions in Quebec) may have acquired no art in 2002-2003.

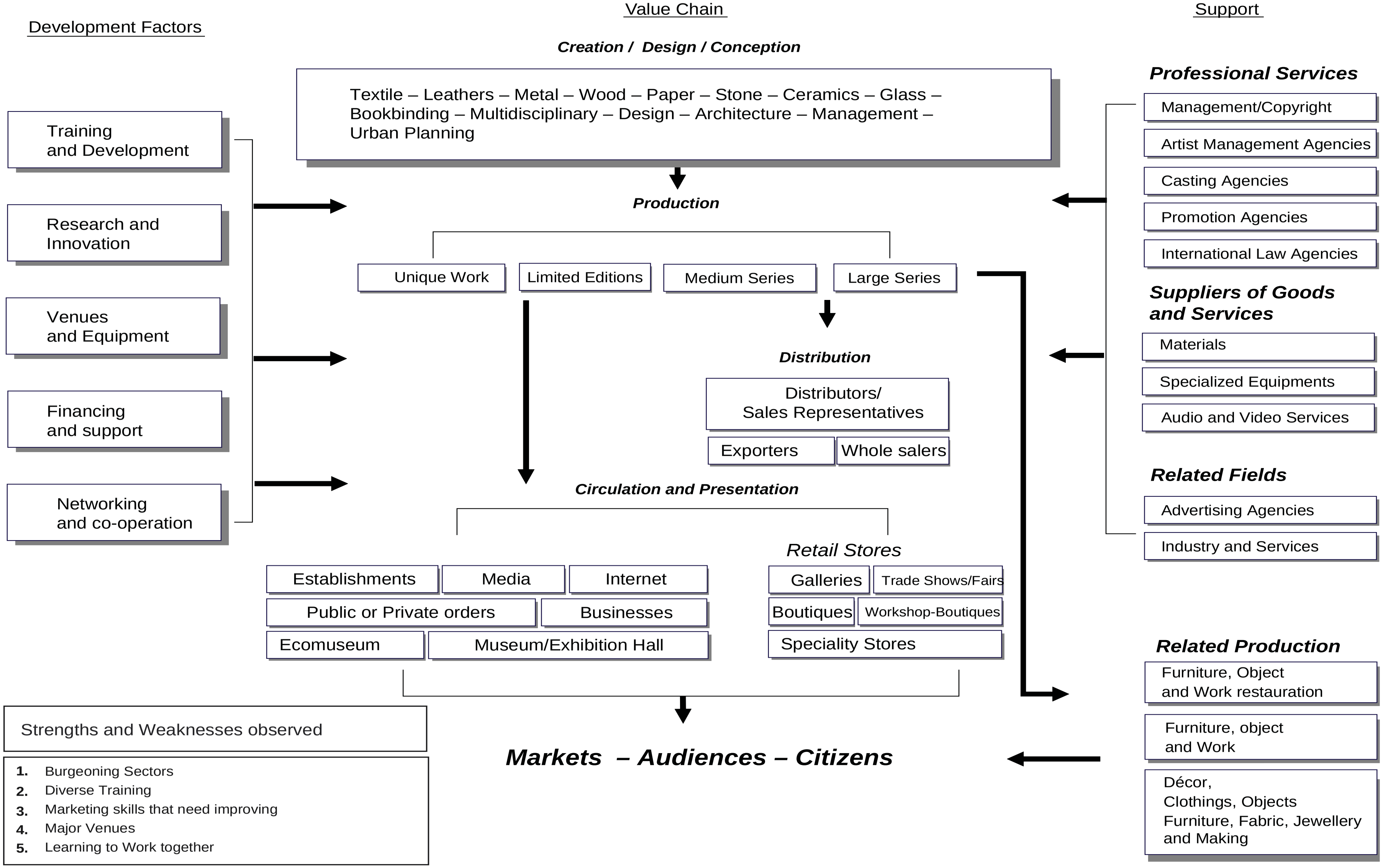
Source: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec, Enquête statistique sur les acquisitions d'œuvres d'art au Québec [Statistical survey of art acquisitions in Quebec].

Sub-Cluster

Crafts, Design, Architecture, Urban Planning and Landscape Architecture

A Growing Sector
Cultural Chain
Development Factors

Sub-Cluster- Crafts, Design, Architecture, Urban Planning, Landscape Architecture



A Growing Sector

Crafts, design and decoration, architecture, urban planning and landscape architecture have applications in many sectors of the economy, starting with real estate and urban facilities construction, engineering and the production of all sorts of consumer goods. It is the creative and cultural aspects of these different fields that link them to the other sub-clusters presented in this document.

Crafts include around a hundred different trades that can be split into three categories: crafts as such (textile, hides and leathers, metal, glass, wood, stone, paper, printmaking, bookbinding, ceramics and multidisciplinary activities), traditional trades (primarily related to restoration and heritage showcasing) and related trades working for medium and large firms.

The Conseil des métiers d'art du Québec (Quebec crafts council – CMAQ) includes 700 professional craftspeople, although a sectoral study led by a researcher at UQAM in 1995 revealed the presence of close to 2,500 part-time craftspeople. The crafts industry is mainly composed of very small workshops. Only a third (35%) of workshops hire staff on a regular basis and only 5% have more than 5 employees. Companies' profitability varies enormously from one trade to another. While woodworking workshops have average sales of $55,020, those specializing in glass manage to generate an average of $161,049. It is worth noting that over 20% of the firms studied by the SODEC declared a loss.

It should also be noted that the mass production by a certain category of craftspeople inflates the overall volume of the 652 companies listed by the CMAQ, which was estimated at $45 million in 1999. A study led by the Société de développement des enterprises culturelles (SODEC) on the financial statements of the 111 companies that it supports financially reveals that this money is distributed very unequally: around 15 companies receive 57% of income and over half the companies have a business volume of less than $50,000. These latter companies, however, post higher profit rates.

Design, architecture, urban planning and landscape architecture include various trades. The Observatoire de la culture et des communications du Québec (OCCQ) drew up an excellent portrait[14] in February 2004 of the various professional groups that it associates with the field of design, i.e. architects, landscape architects, urban planners and land use planners, architecture technologists and technicians, industrial designers, graphics technicians, graphic designers and illustrators, interior designers and set designers, garment designers, exhibit designers and other artistic designers.

This is a growing sector. In 2001 there were 31,555 workers in the nine professions related to the design field compared with 22,515 in 1991, for an increase of 40%. Certain professions saw a considerable increase in their numbers between 1991 and 2001. This is particularly the case with industrial designers (which grew by 207%), while the number of landscape architects fell by 50%. In addition, while in Quebec the architect population increased by a low 2% between 1991 and 2001, this same population increased by 59% in all other Canadian provinces combined. The population of design workers is concentrated in the Montréal metropolitan region, where 65% of such designers live.

14 Observatoire de la culture et des communications du Québec, Statistiques en bref [Statistics Summary]. No. 5, February 2004.

We note that for a certain number of years the field of design has been particularly active. In 2003, the Institute of Design Montréal held the third regional conference of the Conseil International des Sociétés de Design Industriel (ICSID). The Commerce Design Montréal competition has been very popular with the public for the past several years. And the City of Montréal is proud to have been chosen in 2004 for the head office of the International Design Alliance (IDA), having won out over cities such as Brussels, Turin, Nagoya, Copenhagen and Hong Kong.

The Cultural Chain

Creation is the component that comes before all other stages in the process. It presides over the production of single works as well as series prototypes. Competitions and prizes, in particular in the sectors of design, architecture, urban planning and landscape architecture, encourage the quality of creation. It is the same for exhibition sites such as the Salon des métiers d'art de Montréal and the Canadian Centre for Architecture.

Production involves various types of businesses: not only micro-enterprises, but also several small and medium-size businesses. Production is carried out on various scales: production of original pieces, limited editions (less than 10 units), medium series (10 to 50 units) and large series (more than 50 units). In architecture, landscape architecture and urban planning, everything that surrounds the achievement of a project could be considered under the production heading.

Circulation/presentation, distribution and marketing mainly concern the crafts and design sectors. Several approaches may be inventoried, from direct sales to consumers to indirect sales by representatives or wholesalers. Many creators also use the art gallery, exhibition centre and museum circuits.

It should be noted that there is not one, but several crafts markets. Aside from works of research and expression which are classified with the visual arts market, the Conseil des métiers d'art has identified about ten other markets: table arts, gifts, furniture and office items, clothing, fashion and fashion accessories, buildings, books and paper, performing arts, interior decoration, religious clothing and objects, musical instruments. Others prefer to divide the market into five segments: tourism, gifts, boutiques and galleries, catalogue sales and electronic commerce. Direct sales seem to be the main marketing method. That gives us some idea of the importance of trade fairs, exhibitions and shows that are held in Quebec and across Canada each year. Sales in excess of $10 million per year are made in Quebec during these events. The cities of Laval and Montréal both have their craft shows. Also, exports are shaping up to be an activity that is increasingly necessary for development.

With respect to the design industry, it should be noted that this sector is now facing a favourable economic climate. Since the middle of the 1990s there has been a renewed interest in this field mainly related to changes in consumer habits. However, other industrial areas do not always perceive the added value that design can bring to the creation of their products and services, and tend to consider recourse to design as costly. The business community is not very aware of the services that designers can offer – a situation that the Institute of Design Montréal blames mostly on the designers' lack of marketing skills. In this perspective, it would important to develop a culture of design that would promote its acceptance among business sectors. The limited size of the Quebec market also represents a major limitation for the design industry that must therefore turn to international markets and develop its abilities in that regard.

Development Factors

Training and continued professional development

In the various fields related to crafts, institutional training is offered basically at the Institut des métiers d'art du Québec (IMAQ) affiliated with the Old Montréal Cégep which has integrated the former École des arts appliqués. The IMAQ gives junior college-level diplomas (DEC) in ceramics, textile construction, textile printing, woodworking, jewellery, leatherworking and glass. Short programs leading to a college studies certificate (AEC) are also offered. In addition, SODEC subsidizes a network of nine workshop-schools which, in addition to their training mission, carry out research, circulation/presentation and partnership activities. Six of these schools are in Montréal: the Centre de céramique Bonsecours (ceramics), the Centre de recherche et de design en impression textile de Montréal (textile printing), the Centre des métiers du cuir de Montréal (leather), the Centre des métiers du verre du Québec (glass), the Centre for Contemporary Textiles and the École de Joaillerie de Montréal (jewellery).

The Université de Montréal, UQAM and McGill University, as well as several college institutions, offer several training programs in design, architecture, urban planning and landscape architecture. According to the Institute of Design Montréal, the presence of numerous teaching institutions in the field of design is an asset for the region. However, it is to be noted that course content could be improved in order to take into account international competition in design and offer management training.

Also, continued professional development appears as a necessity. Whether it be in the field of crafts or design, architecture, urban planning and landscape architecture, new technologies are increasingly being used as they often lead to greater efficiency. Among others we can mention computer assisted modelling and design technologies. Continued professional development is also necessary to acquire related skills having to do with product marketing, for example.

Research and innovation

Research and innovation are the only ways to stand out and make a name for oneself. It is on this basis that artists and craftspeople are evaluated by the subsidizing organizations and the venues that will help them to gain a solid foothold in their careers.

Creators in the arts and crafts field can obtain grants in order to do internships with the great masters or in well-known apprenticeship centres around the world. Professional groups and regional councils for culture regularly schedule workshops, intensive courses and meetings. For example, the Conseil des métiers d'art has eleven training activities on its 2004-2005 agenda for the Montréal region. The Council has also structured a mentoring program in order to support creators throughout the stages of their progress through fields as varied as career management, the creation and production process, studio start-up and management and marketing.

Aside from professional practice, research in design, architecture, urban planning and landscape architecture is also something that is carried out in teaching institutions. Associations and professional orders can also participate in the vitality of the sector. The Quebec Order of Architects has in particular set up «materials and techniques» committees as well as «environment and architecture» committees.

Venues and equipment

The Montréal metropolitan region is a major showcase for crafts. The Conseil des métiers d'art du Québec has its offices here. The Salon des métiers d'art de Montréal is the largest of its kind in Quebec and the Marché Bonsecours located in the heart of a Montréal tourist neighbourhood, has several boutiques and galleries where jewellers, potters, glass workers, leather and textile workers sell and exhibit their work. In Quebec, there are over 350 boutiques serving as showcases for craftspeople, and 77 of them are located in the CMM territory.

Also note that the Canadian Centre for Architecture, established in the late 1980s, offers architects and designers, urban planners and landscape architects an exceptionally rich documentation centre.

Financing and support

The CALQ supports research, experimentation and creation in the fields of arts and crafts, design and architecture.

SODEC is the main source of subsidies for craftspeople and crafts organizations. Its assistance program for craftspeople and businesses makes a distinction between growing companies and start-up companies and has specific programs to support collective or individual marketing projects. SODEC also has an export and outreach support program to help companies build an export strategy, finance occasional projects abroad and support participation in international trade shows and events. Companies can also obtain financing to increase their production capacity and extend their marketing network. SODEC and the Institut des métiers d'art du Québec collaborated on establishing the Bureau des exportations des métiers d'art du Québec (BEMAQ) to promote the export of craft products. This non-government organization acts as an intermediary between the craftspeople and the organizers of trade fairs held outside Quebec.

The Canada Council for the Arts (CCA) provides direct subsidy programs to artists (grants, research, artists-in-residence programs) as well as programs to support organizations. The CCA manages the Jean-A. Chalmers Fund, which is used to finance research activities and projects that promote analysis and evaluation of Canadian crafts production. Note that the federal government supports crafts exports through various Canadian Heritage programs and through the Department of Foreign Affairs and International Trade.

Networking and collaboration

The associations and professional orders play a major role in the development of the various disciplines related to crafts, design, architecture, urban planning and landscape architecture. However, due to low membership and limited financial and human resources, several of these associations or professional orders have a great deal of difficulty carrying out their mandate. The lack of cohesion and common actions among the various related fields appears to be a major issue to which we need to pay particular attention.

Other players also are important. For example, the Institute of Design Montréal has the mandate to promote design as an economic value and make Montréal a world class centre for design.

Some Figures

Main Statistics Related to Architectural Services in Quebec, from 2000 to 2002

	Unit	2000	2001	2002
Establishments	#	846	1,037	1,141
Operating Revenue[1]	$mil	206,5r	215.2	286.1
Payroll and Benefits	$mil	75,3	55.9	82.7

1. Operating revenue excludes investment income, capital gains, extraordinary gains and all other moneys that are not repetitive.
Source: Statistics Canada, Annual Survey of Architectural Services.

Main Statistics Related to Specialized Design[1] Services in Quebec, from 2000 to 2002

	Unit	2000	2001	2002
Establishments	#	1,982r	2,173r	..
Operating Revenue	$mil	469.2r	466.8r	494.0
Payroll and Benefits	$mil	135.3r	140.5r	133.0

1. Includes landscape architecture, interior design, industrial deisgn and graphics design services as well as other specialized design services.
Source: Statistics Canada, Annual Survey of Specialized Design Services.

Design Professionals, Quebec, 1991-2001

	1991	1996	2001	Change 1991-2001
		#		%
Architects	3,160	2,975	3,235	2.4
Architectural Technologists and Technicians	1,630	1,340	1,875	15
Landcape Architecte	1,190	675	590	-50.4
Interior Designers	1,705	2,155	2,665	56.3
Industrial Designers	1,180	1,115	3,620	206.8
Graphics Designers and Illustrators	8,005	8,495	10,595	32.4
Graphics Technicians	810	2,350	3,940	386.4
Urban and Land Use Planners	1,235	1,205	1,120	-9.3
Theatre Decorator/Designers Clothing Models, Exhibit Designers, and other artistic designers	3,600	3,725	3,915	8.8
All	**22,515**	**24,035**	**31,555**	**40.2**

Source: Statistics Canada, 2001 Census.
Compiled by: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec

Distribution of Design Professionals by Area of Residence, Quebec, 2001

	Montréal Area Metropolitan	Quebec City Area Metropolitan	Elsewhere in Quebec	Total
		%		
Architects	65.8	15.9	18.2	100
Architectural Technologists and Technicians	49.6	19.2	31.2	100
Landcape Architecte	56.8	15.3	28.0	100
Interior Designers	64.5	9.4	26.1	100
Industrial Designers	63.1	9.4	27.5	100
Graphics Designers and Illustrators	66.1	10.8	23.1	100
Graphics Technicians	62.6	9.5	27.9	100
Urban and Land Use Planners	46.0	17.0	37.1	100
Theatre Decorator/Designers Clothing Models, Exhibit Designers, and other artistic designers	82.1	6.5	11.4	100
All	**65.3**	**11.2**	**23.6**	**100**

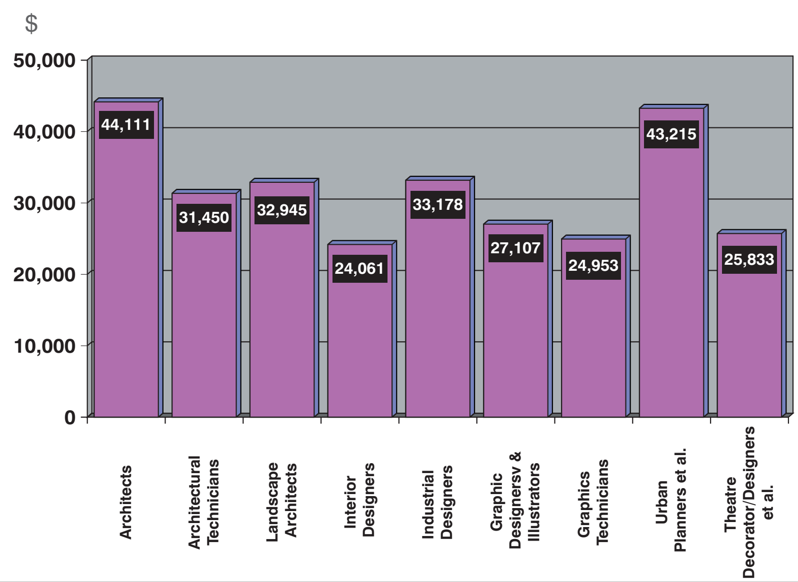
Source: Statistics Canada, 2001 Census.
Compiled by: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec

Distribution of Design Professionals by Job Status, Quebec, 2001

	Employed	Self-employed	Other	Total
		%		
Architects	57.3	42.3	0.3	100
Architectural Technologists and Technicians	90.1	9.6	--	100
Landcape Architecte	63.6	34.7	1.7	100
Interior Designers	56.0	43.4	0.6	100
Industrial Designers	87.8	12.0	0.3	100
Graphics Designers and Illustrators	73.9	25.9	0.2	100
Graphics Technicians	79.2	19.8	1.0	100
Urban and Land Use Planners	95.1	4.9	--	100
Theatre Decorator/Designers Clothing Models, Exhibit Designers, and other artistic designers	76.2	23.6	--	100
All	**74,7**	**24.9**	**0.3**	**100**

Source: Statistics Canada, 2001 Census.
Compiled by: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec

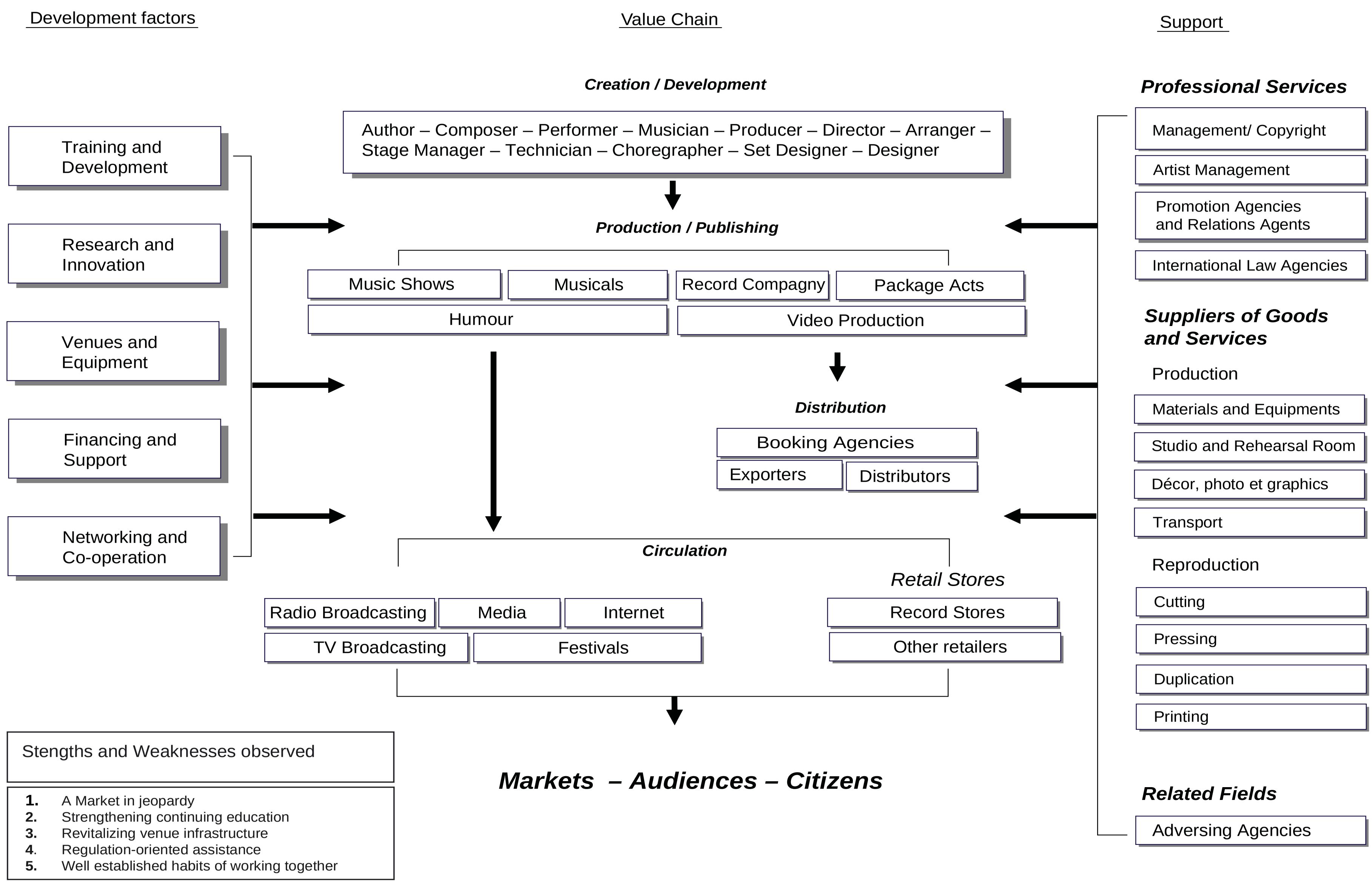
Average Employment Income for Nine Design Professions, Quebec, 2000



Sub-cluster

Recording Industry and Package Acts

Sub-Cluster Recording Industy and Pakage Acts



A Market in Jeopardy

A comparatively young industry compared to the major international groups that are its competitors, the recording and package act industry began its expansion in the early 1980s. Today, this industry produces 95% of all albums by Quebec artists and has garnered around a quarter of the record market in Quebec, with the rest belonging to the large multinationals. Between 1999 and 2003, this industry produced 273 albums and 335 package acts[14].

The Quebec recording and package act industry is concentrated in the Montréal metropolitan region around the radio and television stations (with which it has very close ties) and close to an impressive network of concert venues (63 venues with 30,283 seats).

The recording and package act industries have not seen any real growth since 1995. This stagnation can be surprising given the sustained popularity of comedians and major festivals. In 25 years there has not been any real consolidation of this sector despite a substantial increase in subsidies. We are forced to observe that it is a fragile industry with several vulnerable companies. All it would take to plunge these companies into serious difficulties would be one poor choice of production and an unfavourable market context.

The record market, which is the spearhead of the industry, is seeing dark days. In Canada, it slipped under the threshold of CDN $1 billion in 2002, which is about the level it was at ten years ago. This decline is following the worldwide curve which, after having reached a peak of $40 billion in 1995, came back down to $30 billion US. In the meantime, the time the number of musical files that were downloaded from shareware sites continues to climb. From around three billion in 1999, the number went up to 150 billion in 2003. The same year in Quebec, 17% of adults and 70% of teenagers listened to, or downloaded and burned music onto, CDs.

In this regard, the record producers of are asking that an end be put to the double standard regulations that exempt radio stations from paying royalties for the part of their program that is broadcast over the Internet, and that the Internet access providers be required to pay copyright royalties like all other broadcasters. On the basis of the figures from 2002, a 3% contribution would bring in an additional $18 to $30 million for the Quebec industry.

While the Internet is exploding, means for the artists to become better known are shrinking. General television stations no longer program any regular shows devoted to song and music, with budgets allocated for that purpose down by over 35% between 1997 and 2001.

14 Data and statistics of this section come from Statistiques principales de la culture et des communications au Québec [Main Culture and Communications Statistics in Quebec], Observatoire de la Culture et des Communications du Québec – Institut de la statistique du Québec, 2004 edition; Déchiffrer la culture au Québec, 20 ans de pratiques culturelles [Deciphering culture in Quebec – 20 years of cultural practices]. Ministère de la Culture et des Communications du Québec, Les Publications du Québec, 2004. See also: Synthèse sur le comportement et les pratiques des consommateurs en matière de commerce électronique du disque et de la musique [Summary of Consumer Behaviour and Practices with Regard to Buying Records and Music Online]. SODEC, December 2002; L'industrie du disque et du spectacles de variétés au Québec – portrait économique des enterprises [The Record and Package Acts Industry in Quebec]. SODEC, May 2002; and L'industrie du disque au Québec – portrait économique [Economic Portrait of the Record Industry in Quebec]. SODEC, October 1998.

With respect to radio broadcasting, the problem is one of diversity. In 2003-2004, the 15 songs at the top of the hit parade took up more than 50% of broadcast time, which is an increase of more than 10% in one year. Also, according to the BDS charts, only 78 new titles were played on French-speaking commercial radio stations in 2003. This monopoly of success directly influences the sale of albums that are channelled to titles that are at the top of the hit parade and compromise the creation of a new talent pool.

Also it should be noted that electronic music is capturing an increasingly large place in the international reach of the metropolitan region, in particular thanks to festivals such as *Mutek.*

The metropolitan region also has the good fortune to possess a major underground sector which recently made headlines in the New York Times. This underground is fuelled both by alternative and emerging cultures. However, the underground community often lacks recognition, financing and venues.

The Cultural Chain

Production is the pivotal point around which all of the industry is articulated. It influences the choice of artists and the works to be promoted. Considerations related to the notion of financial risk are present from one end of the chain to the other.

First, producers call upon several trades in the creation sector to design and set up the works and products to be offered. Among them are authors and composers who create the compositions, directors and producers who design productions and act as main contractors on the artistic level, then there are the singers, musicians, actors and dancers who perform the works, and technicians who participate in production.

Production as such is divided into two segments: the package act compositions and presentations (song, humour, pop music and musicals) segment and the records and related products segment. Production deals with all stages from financing to budget control, choosing the production team and marketing the piece. There are around 400 record producers and package act producers in Quebec and they are for the most part located in the Montréal metropolitan region. More precisely, according to Statistics Canada, the Montréal CMA includes 108 companies operating in the field of sound recording. Nearly 30 companies are solely record producers. Most are also act producers or impresarios. Several do all three functions (29) and even more since some of them are also agents, music publishers, video producers, promotional agents and media relations relations agents.

On the production side **technical services** provide all kinds of specialized services from studio and equipment rental to duplication and manufacture of records.

Record **distributors** and **booking agencies** serve as intermediaries between the producers and broadcasters.

Broadcasting and retail provide access to audiences through radio and television broadcasting, concert venues and festivals as well as record stores.

Development Factors

Training, continued professional development, the quest for innovation

The recording and package act industry have professionals and technicians in many disciplines, each with their own type of training.

People who have a career in the industry and who want to acquire specific training have limited choices. However, observing that companies were not sufficiently endowed with specialized personnel, ADISQ carried out a study with the help of the Conseil québécois des resources humaines en culture (CQRHC – advisory on human resources in the culture field) about the needs of record production and show production companies in terms of professional development, managing human resources and training. On the strength of those results, it developed a professional training program dealing in particular with the status of the artist, the various types of contracts, royalties and their collection. In total, the 28 sessions attracted 311 participants including two-thirds working for companies located in Montréal. The program is continuing and should look into some questions such as music publishing, marketing, promotion and accounting.

Venues and equipment

Recording, videos and package acts require different delivery infrastructures. The most important element is to offer a high diversity of works and to provide easy access to audiences.

The recording and package acts industry can rely on a large network of vendor sites in the Montréal metropolitan region that are mainly related to major chain stores such as Archambault, HHV, Renaud-Bray and Music World. There is also a large network of auditorial facilities for package acts. The Montréal metropolitan region also has high level facilities, following investments that were put into building and renovations. However, the underground community is experiencing a lack of sites for creation and circulation/presentation due in particular to limited financial means, real estate speculation and resistance from the community at large (misconceptions, prejudices and intolerance).

However, the recording and package acts industry has taken a new step forward by suggesting the implementation of a theatre district in the heart of the downtown, known as the *Quartier des spectacles.*

The Quartier des spectacles

The Quartier des spectacles project is a major revitalization project for the downtown area. It was proposed in June 2004 by the non-profit organization created by the mayor of Montréal in the spring of 2003. This project mobilizes the entire cultural industry and includes 21 partners, grouped under the Partenariat du Quartier du spectacle (PQS) organization. The PQS is responsible for coordinating an ambitious development plan aimed at creating a veritable cultural centre, right in the centre of the downtown core.

The idea was presented to the Quebec Ministry of Culture and Communications in the fall of 2001 and was viewed as a priority at the Montréal Summit in 2002. Currently, the Quartier des spectacles is defined as being circumscribed by Sherbrooke, Berri, René-Lévesque and City Councillors streets, and is the venue for the major festivals. It contains 28 auditorium facilities with a total of 30,000 seats.

Based on current infrastructures and events, the plan is to showcase and consolidate the neighbourhood's festival vocation. Investments are to be made progressively. A methodical plan provides for the reconditioning of the underground infrastructures, sidewalks and street lighting, the design of specialized public spaces such as the Place des Festivals, on the corners of Saint-Catherine and Jeanne-Mance streets, the building of a concert hall for the Montréal Symphony Orchestra, the transformation of vacant lots, the design of green spaces and the construction of a building at the Saint-Laurent metro station with a large marquee to serve as a cultural showcase and one-stop shop for ticket purchases. Uniform signage, lighting and billboards will give this neighbourhood its own special identity.

Problems, however, are evident in the radio and television infrastructure. Radio has lost a great deal of its diversity, while television offers less and less musical and package acts. Fortunately the specialized cable channels showing music videos and performer interviews help to make up for this shortcoming. However, the massive arrival of foreign specialized channels could jeopardize local channels such as MusiquePlus and Musimax.

Financing and support

The Quebec recording and package acts industry is financed through its own income: record sales, ticket sales, services, honorariums, copyright or licences, etc. This industry is 6% subsidized (2000). Government support budgets have been rising since 1996. However, according to ADISQ the companies are still under-capitalized, inhibiting their ability to offer outlets for all creators and to provide a wide variety of choice and voices to Quebec audiences throughout the province. Although financial assistance is increasing from both levels of government, it still is not sufficient to make up for the deficiencies.

Aside from the tax credits that it has granted since 1999, the Quebec government has grouped its assistance measures under the Programme d'aide à l'industrie du disque et du spectacle de variétés (PADISQ) and the Programme d'aide à l'exportation et au rayonnement culturel (SODEXPORT). Both programmes are administered by SODEC. Quebec's cultural enterprises also have access to two sectoral sources of venture capital: the Fonds d'investissement de la culture et des communications (FICC) and the Financière des enterprises culturelles (FIDEC).

The federal government also has a subsidy program, the Sound Recording Development Program (SRDP). In 2002, following the adoption of the Canadian Sound Recording Policy, Canada created the Canada Music Fund (CMF), which includes eight separate programs including one devoted to new compositions. In Quebec, the CMF is managed by Musicaction, a not-for-profit foundation founded in August 1985 following an initiative by professionals from radio and the Quebec recording and package acts industry. Musicaction's mission is to encourage development of music by supporting album production and marketing.

Regulatory organisations

The recording and package acts industry must deal with a relatively complex regulatory environment due to copyright paid to songwriter/composers and producers when their work is broadcasted. The Canadian Copyright Act passed in 1997 includes two compensation plans.

The first plan, called «neighbouring rights» provides for the payment of royalties to the producers of sound recordings and to the performers in compensation for broadcasting their work, especially on radio. These royalties are collected from the broadcasters according to a tariff grid that takes into account their status and their mission.

The second plan is called private copy. This provides for the payment of royalties to songwriter/composers, publishers, performers and producers for the use of their works through private copies. Royalties are charged to importers and manufacturers of blank support. Private copy of works downloaded by Internet, however, is not subject to these royalties given the absence of viable data.

Since it grants operating licenses and determines the norms and conditions for their use, the Canadian Radio, Television and Telecommunications Commission (CRTC) has the means to support the recording and package acts industry. It was set up to protect and ensure the development of the Canadian industry. It is up to the CRTC to impose and enforce Canadian content standards and to limit the proliferation of competitive channels.

In Quebec, the Loi sur le statut professionnel et les conditions d'engagement des artistes de la scène, du disque et du cinéma requires ADISQ to negotiate collective agreements with a recognized performers' association that requests it. Such agreements exist for the production of records, music videos and shows, in particular with the Union des artistes and the (Quebec) Musicians Guild.

Networking and collaboration

ADISQ has 110 members out of the some 400 record and show producers in Quebec, including all the major players. Founded by 32 members in 1978, ADISQ today groups 250 companies representing the entire industry: record, package act and video producers, record companies, impresarios, record distributors, etc. In addition to defending the interests of its members, ADISQ sees to the health of the industry and intervenes at the government level to promote the iand to make representations when certain decisions and policies may have a negative impact. It often does this jointly with its Canadian arm, the Canadian Recording Industry Association (CRIA).

The annual ADISQ Gala is an exceptional showcase for the industry with respect to the general public. Each year since 1995 ADISQ has organized a sectoral summit, called 'Les rencontres professionnelles de l'industrie québécoise du disque, du spectacle et de la radio'. At this very popular summit, professionals from the recording, package act and radio industry in Quebec take stock of the «state of the venues» and promote alliances and networks between the members of this community and professionals from foreign countries who are invited to participate.

Since 1979, ADISQ has represented the Quebec industry at the MIDEM, the largest trade show in the world for the recording and package acts industry. This participation has contributed to making local performers and producers known and increasing their presence on international markets and more particularly on the European market.

The Société pour l'avancement de la chanson française (Society for the Advancement of French Song or SACEF), the Société collective de gestion des droits des producteurs et phonogrammes et vidéogrammes du Québec (Collective Copyright Management Society for Quebec Producers and Sound and Video Recordings - SOPOQ), the Society for Reproduction Rights of Authors, Composers and Publishers in Canada (SODRAC), and the Société pour la promotion de la relève musicale francophone (Society for the Promotion of Emerging Francophone Musicians – SOPREF) are other organizations that exist to defend the interests of the industry.

Some Figures

Main statistics on sound recording producers, record companies and labels[1] in Quebec, from 1995-1996 to 2000[2].

	Unit	1995-1996	1998	2000
Number of businesses	#	84	88	125
Number of new recordings	#	1,218	997	929
Per Canadian artist	#	225	300	309
Other	#	993	697	620
Income	$mil	170,3	176,7	..
Total industry-related income	$mil	..	..	..
Canadian sales / artists	$mil	20,5	27,4	29,1
Other sales	$mil	74,1	52,4	62,9
Other industry-related income4	$mil	..	..	..
Jobs				
Full time	#	721	592	..
Part time	#	56	54	..
Freelancers	#	78	235	..

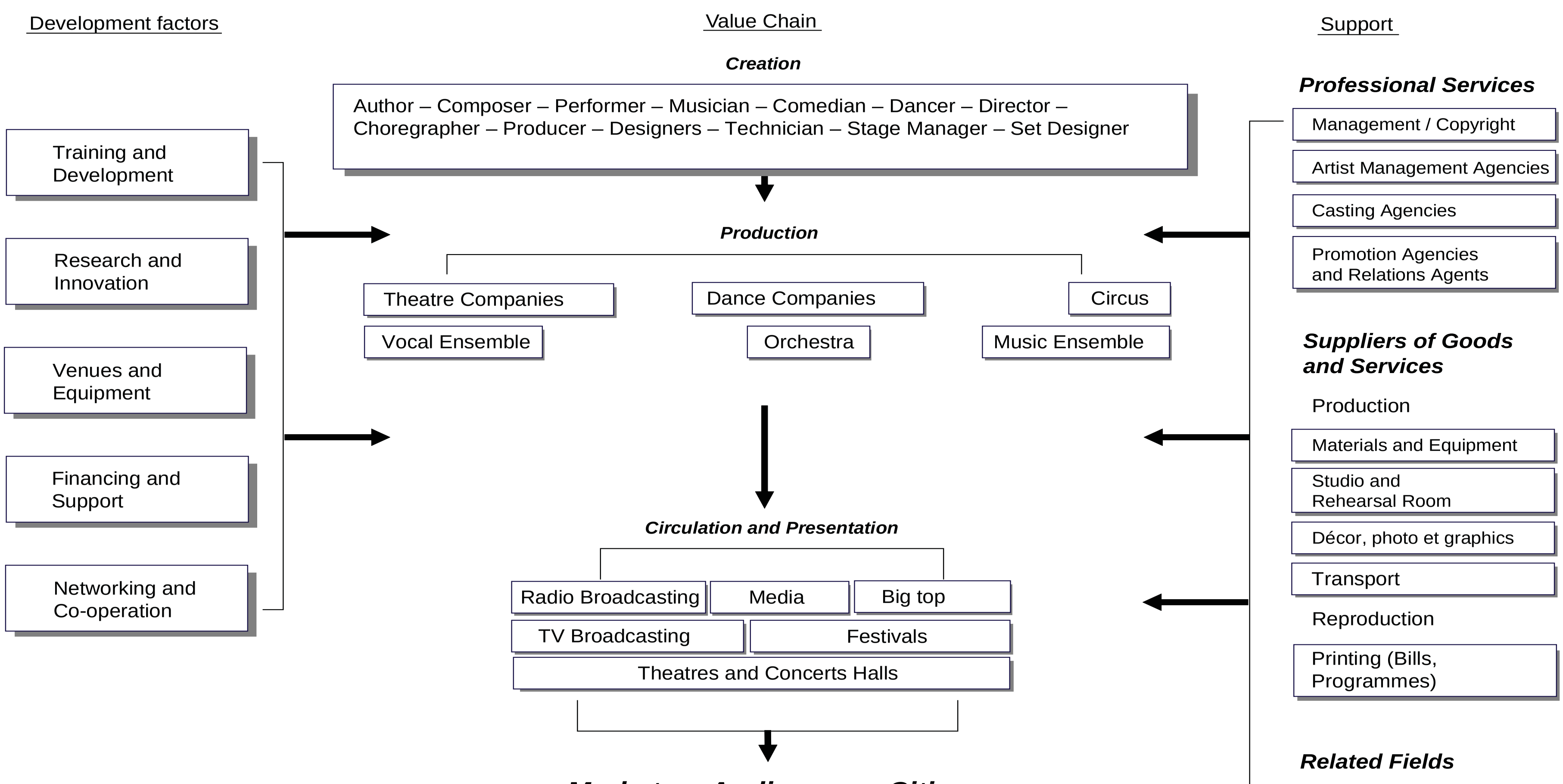
1. Includes businesses under Canadianm control as well as businesses under foreign control.
2. Figures have been rounded; total may therfore not correspond to totals indicated.
3. Includes non-industry-related income.
4. Includes sale of master tapes, licences and reproduction/publishing rights. Source: Statistics Canada, Sound Recording Survey (87F0008XDB).

Sub-cluster

Theatre and Circus Arts

A Concentration of Talent
Culture Chains Made to Measure
Development Factors

Sub-Cluster – Theatre and Circus Arts



Stenghts and Weaknesses observed

1. High talent concentration
2. Supply exceeds demand
3. High-quality artistic training
4. Upgrading premises and Venues
5. A still underfinanced
6. The habit of Working together is growing

A Concentration of Talent

The diversity and effervescence of theatre and circus arts in the Montréal metropolitan region are recognized throughout the world. They include almost 85% of all artistic creation organisations in Quebec, i.e. 139 not-for-profit organisations, including 53 theatre companies, 33 music ensembles and 24 dance troupes. Also, Montréal is home to the head office of Cirque du Soleil, a company that today entertains people the world over.

This region presents the highest number of shows in Quebec, i.e. more than 20 shows for 10,000 inhabitants. In 2001, audiences reached 4.4 million people, a 24% increase since 1997, while the number of performances has remained relatively stable, at about 12,000 shows per year. However, local production has seen its popularity decreasing. Between 1990 and 1998, a decrease of 18.5% in audiences has already been noted, while foreign productions benefited from a 133% increase, despite higher ticket prices.[15]

These companies are very dependent on subsidies. In 2001, public assistance reached $61 million, or an increase of 30% since 1997 ($47 million). These subsidies are necessary since the companies' independent income has levelled off at about $58 million while private assistance, although it is slowly increasing, is barely more than $17 million. It is to be noted that the companies, to counterbalance the effects related to the large diversity of shows compared to the small population to draw on, must constantly increase their advertising budgets, thereby further weakening their financial situation.

Culture Chains Made To Measure

Like most other culture chains, the theatre and circus arts chain is based on creation. However, it stands out through the importance of the ties between production and performance, especially in the theatre sector. The theatre and circus arts culture chain in the Montréal metropolitan region also stands out from those in other regions of Quebec since the majority of companies presenting shows also play the role of producer.

Creation calls upon a very broad range of professions and trades to design and set up works: authors, composers and choreographers usually create the work while directors transpose it to the stage, where it is performed by actors, dancers, musicians and singers. Scenographers, costume-makers, wig-makers, set designers, lighting specialists and many other technicians are called upon to help with design and decor.

15 Data and statistics of this section come from Statistiques principales de la culture et des communications au Québec [Main Culture and Communications Statistics in Quebec], Observatoire de la Culture et des Communications du Québec – Institut de la statistique du Québec, 2004 edition, Déchiffrer la culture au Québec, 20 ans de pratiques culturelles [Deciphering culture in Quebec – 20 years of cultural practices]. Ministère de la Culture et des Communications du Québec, Les Publications du Québec, 2004

Production and presentation/performance depend on the sector under consideration

Theatre companies are usually in a precarious financial situation and therefore try to diversify their management mechanisms. The 11 theatre companies who own venues are interested in co-production, co-distribution and renting out the premises for purposes other than theatre. There are also several theatre festivals in the CMM territory, the most prestigious being the Festival de théâtre des Amériques. In 1999, 68% of the theatre workers in Quebec lived in the Montréal metropolitan region.

The Montréal metropolitan region is well-served with respect to music.[16] The Opéra de Montréal is one of the fifteen top opera houses in North America. It annually produces and presents five operas. The Montréal Symphony Orchestra (MSO) enjoys an international reputation and presents twelve series of several concerts, while the Orchestre métropolitain du grand Montréal presents seven series. These two orchestras also give summer concerts. The various music organisations in the region each year employ nearly 3,000 people. In 2001 nearly 1.7 million people saw a musical show, up by more than 23% since 1997. However, the number of Quebeckers who went out to hear a concert is on the decline. The proportion was 37% in 2001, while it was 47% in 1989.

With respect to dance, Montréal productions are internationally recognized for their originality and innovation. In 2001, 26 dance companies generated revenue of $19 million. This was thanks to public aid worth $10 million and private aid of $2.6 million. In 1999, these organisations hired 418 people (equivalent to 165 full-time jobs) for an average salary of $17,280 which is equivalent to around 20 weeks of work per year. Attendance at shows is however decreasing, as is the number of dance troupes. In 1997, 37 dance troupes attracted more than 440,000 people while in 2001 26 dance troupes attracted 366,000 spectators. In 2004 the sector experienced a particularly difficult year when the Festival international de Nouvelle Dance (FIND) and the choreographic centre of the Jean-Pierre Perreault Foundation had to close their doors. Several dance companies also experienced financial difficulties.

The circus, although it is part of the performing arts, is different due to the concentration of the creation, production and presentation/performance functions. Montréal circus companies are remarkable for their innovation and technical prowess. In particular, the Cirque du Soleil and the Cirque Eloize are well-known on the international scene. Currently, the Cirque du Soleil employs more than 1,500 people in five travelling productions and five permanent sites. Two Cirque Eloize troupes presented shows in 200 cities located in 20 countries, reaching more than 2.5 million spectators since the Cirque was founded in the 1990s.

16. N.B.: Concert music records (classical, lyrical art, jazz, etc.) are included under the Recording Industry and Package Acts sub sector.

Development Factors

Training and continued professional development

In general, the Montréal metropolitan region has training infrastructures and programs that are at the leading edge of performing arts creation, despite the lack that has been observed with respect to high level training.

In theatre, there are 19 public or private schools in the CMM territory. Secondary, college and university diplomas are available through those schools.

As for the dance sector, the Pierre-Laporte High School offers a dance study program at the secondary level. The National School of Contemporary Ballet also offers a 12-year study program. That program leads to a college degree in performance/interpretive dance. The Saint-Laurent Cégep has a pre-university program in dance while the Vieux-Montréal Cégep has a technical program. Concordia University and UQAM offer graduate and post-graduate programs. The École des Grands Ballets canadiens de Montréal trains classical ballet dancers. Finally, several private schools give specialized dance courses from flamenco to the tango, and passing by modern dance and traditional dance.

Music training is very diversified. The Conservatoire de musique et d'art dramatique de Montréal, the Cégeps and universities offer several programs going from the college certificate to PhDs. There are also numerous private schools. At the college level, the Saint-Laurent and John Abbott Cégeps offer performance arts programs. McGill University, Université de Montréal, Concordia University and Université du Québec à Montréal all develop talents in classical music, jazz, instrumental composition, musicology, music archives, performance and teaching. Also, the new generation of performers can build contacts all over the world, through a number of international exchange programs.

In the field of circus, the National Circus School as well as the École de cirque de Verdun and the École de cirque Païdzo all contribute to enriching the training offered to the new generation of performers.

Research and innovation

Research, innovation and creation are at the heart of the performance arts and circus system. One might say that these fields are in a state of perpetual renewal. The Cirque du Soleil is obviously a model in terms of research and innovation. It utilizes many creative resources in order to reinvent the genre. Also, it goes without saying that the various university faculties who are interested in the performance arts also conduct different types of research in the field.

Venues and equipment

The Montréal metropolitan region has 114 venues for performing arts with a total of 65,578 seats. Specialized circulation/presentation sites such as the Agora de la danse are included in this number. Place des Arts has 13% of these seats and cultural centres have 4%. Montréal audiences have a number of theatres available including a part that have recently been upgraded. In music, the Montréal Symphony Orchestra has for a long time demanded an auditorium designed for and devoted to concert music. We also note that there are insufficient creation and production sites, particularly in the dance environment.

The Cité des arts du cirque (Tohu) is implementing an urban zone devoted to circus arts in the Saint-Michel neighbourhood. The Cirque du Soleil, with its studios and performers' lodgings, as well as the National Circus School, are located there. A permanent big top with 180 seats has been built there, making it possible to promote the creation and production of circus shows while promoting distribution as well. Let us also note that Cirque Éloize has recently located in the old premises of the National Circus School at the Dalhousie train station.

Financing and support

Performance art receives funding and support from the Conseil des arts et des lettres du Québec, the Canada Council for the Arts and the Conseil des arts de Montréal. While their funding is insufficient, it is generally acknowledged that the content of the programs set up by government-subsidized organisations by do meet the needs of the community. However, some progress has been made in the last few years. The Canada Council for the Arts and the Conseil des art et des lettres du Québec budgets have been increased, partly as a result of pressure brought to bear on the Canadian and Quebec governments by the Mouvement pour les arts et les lettres (Arts and Letters Movement or MAL).

Although highly subsidized, revenue by performance arts organisations has been rising in the last few years. The situation of circuses is particular in this regard since the field survives almost entirely on independent income.

In terms of financing, the problems surrounding major events and major institutions are still cause for concern.

Networking and collaboration

Each discipline has a representative association that looks after the interests of its members and that looks after promoting their discipline including the Conseil québécois de la musique (Quebec music council), the Conseil québécois du théâtre (Quebec theatre council) and the Regroupement québécois de la danse (Quebec dance group). The rallying force for the circus community is the «En Piste» organisation.

The «Réseau Scènes» organisation, founded in 1987, also groups together 19 presenters of professional shows who are interested in all performing arts disciplines: song, music, theatre, dance, young audiences, circus arts, storytelling, humour, etc. Réseau Scènes actively contributes to the development of performance arts in the entire Montréal metropolitan region.

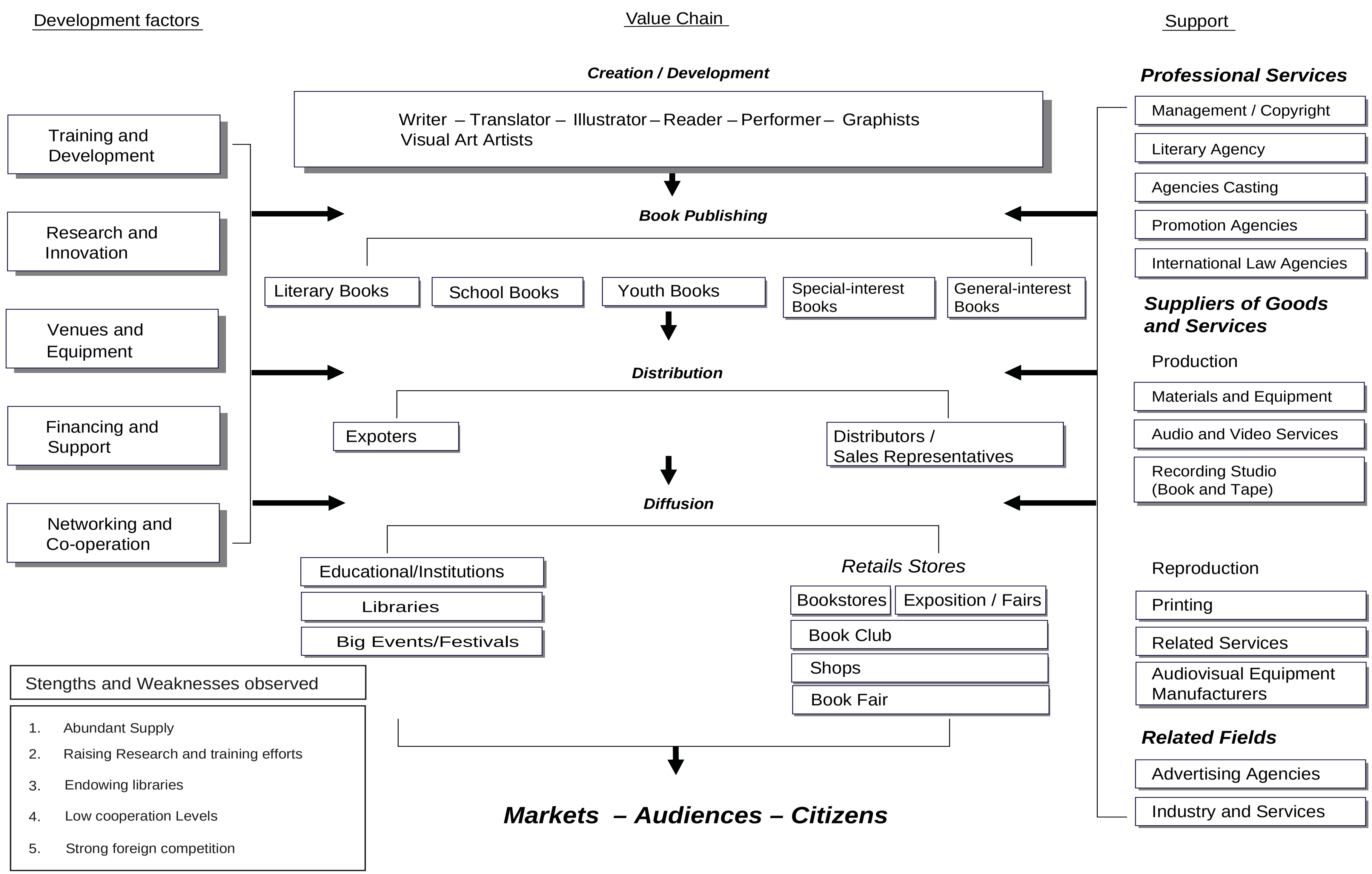
In addition to making representations to the public authorities, the various associations organize among other things training sessions, production activities, presentation and performance activities. They promote the creation of issue tables while informing their members about basic business management concepts. In addition, certain associations organize awards of recognition such as the Gala des Masques in theatre and the Opus Awards in music. Let us also mention the presence of many unions, including the Union des artistes (UDA).

Sub-cluster

Books and Literature

Abundant Supply
The Cultural Chain
Development Factors

Sub-Cluster - Books and Literature



Abundant Supply

In Quebec, the book market represents nearly 26 million copies sold and around $650 million in annual sales. More than 4,000 new Quebec titles are published every year. With foreign production, that means more than 29,000 new books on the shelves of bookstores and other businesses every year.[17]

This is a sector that includes not only authors, writers, illustrators and translators but also publishers, distributors, bookstores and merchants of all kinds, as well as a multitude of employees, freelancers and contract workers who, each in their own way, participate in a book's distribution and retailing.

The Montréal metropolitan region is the major hub for publishing, printing, distribution and sale of books in Quebec. Nearly 80% of the titles that come out in Quebec are published by publishers in this region. We also find nearly half of all bookstores in Quebec located in this region.

The nomination of Montréal as the World Book Capital for the year 2005-2006 by UNESCO should help the city to reinforce its position with respect to the national and international markets. According to the Association nationale des éditeurs de livre (National Association of Book Publishers or ANEL), such an event will have a favourable impact on the visibility of Quebec literature ("le Québec littéraire") abroad. Montréal has been chosen especially for the vitality of its publishing activity.

The Cultural Chain

There are five essential and interrelated components in the book chain: creation, publishing, technical industries (printing), distribution and circulation/presentation.

The book industry is based on the vitality of the creation community. The quality and size of the creative resources are the very basis of its development. Writers, authors, editors, translators and illustrators are generally freelancers who are hired by a number of publishers and other media enterprises.

17 Data and statistics of this section come from Statistiques principales de la culture et des communications au Québec [Main Culture and Communications Statistics in Quebec], Observatoire de la Culture et des Communications du Québec – Institut de la statistique du Québec, 2004 edition; Déchiffrer la culture au Québec, 20 ans de pratiques culturelles [Deciphering culture in Quebec – 20 years of cultural practices]. Ministère de la Culture et des Communications du Québec, Les Publications du Québec, 2004 and Les chiffres des mots – portrait économiques du livre au Québec [Figures for Words – Economic Profile of the Book Industry in Qu.bec]. SODEC, May 2001.

Publishing corresponds to the basic activity of editor-publishers that take the risk of publishing a proposed manuscript or one that is written on order. In 2002, there were 158 certified publishers in Quebec who put out 4,362 new titles with an average print run of 2,197 copies, for a total print run of 9.6 million copies. The CMM territory is home to 69% of all Quebec publishers that are members of the Association nationale des éditeurs de livres (ANEL). Of the 2,761 titles published each year by ANEL member publishers, 2,210 (i.e. 80%) are issued by publishers who live in the Greater Montréal Area. This sector includes publishers of scholastic books and textbooks, literary books, books for young people and how-to books.

Technical industries round out production activities. In Quebec there are about 20 book printers, including two multinationals: Québécor and Transcontinental. In the CMM territory there are three book-printing plants, the Quebecor-World plant in Montréal, Veilleux Imprimeur in Boucherville and Hebdo-Litho in Saint-Léonard.

Distribution is the intermediary between the publishers and the various points of sale. It makes it possible to promote the book to the Quebec public and to physically send the products to the various points of sale. Distribution may be also among the public libraries and book fairs or to booksellers and other stores. According to SODEC there were 48 distributors in 2000 in Quebec. Of that number, more than 20 operate within the Montréal metropolitan region.

Distribution is controlled by just a few companies. The three major distributors (Sogides, Québécor Média and Diffusion Dimédia) account for 36% of book sales, the top five distributors account for 47%, and the top ten distributors account for 53%. The characteristics of the industry limit the entrance of new companies into this sector of activity (intrusion). The size of the investments necessary – including data systems and human resources costs – is a major obstacle.

Circulation/presentation is handled to a great degree by bookstores and other book points of sale. The CMM territory is has a great number of bookstores giving access to the book market. Of the 218 bookstores certified in 1999, 31 were located on the Island of Montréal. In total, the five administrative regions located in whole or in part in the CMM territory held 54% of the certified bookstores in Quebec.

In the past few years, we have noted the development of major chain bookstores with a network of branches. The largest network in the Montréal metropolitan region is the Renaud-Bray bookstore, which has about a dozen branches. Major chain bookstores had an average business volume of $4.9 million in 1999. Although they represent only 18% of bookstores in Quebec, these major bookstores account for 36% of sales. The development of major bookstore chains leads to a certain level of concentration among them that can in turn lead to questions regarding the diversity of the books offered.

There are still many independent bookstores in Quebec, in particular in the Montréal metropolitan region where specialization is still possible. These bookstores have less than three branches, and on average their volume is $1.4 million. Independent bookstores in Quebec represented in 1999 three-quarters (160) of the certified bookstores in Quebec. With a sales volume of $223 million they represent 42% of the total income for the industry. With respect to school and university bookstores where the purchasing volume is often high but where the diversity of books offered is very low, in 1999 they represented 8.7% of bookstores in Quebec for a sales volume of $6.3 million which corresponds to 22.4% of the total sales for the industry.

It is important to note that Quebec books are the minority in the bookstores. According to a study by the Société de développement des entreprises culturelles (SODEC), the percent of Quebec publishing titles sold in bookstores was 17% in 1998. The percent of foreign titles was 83%.

Libraries and book fairs also play a major role in terms of circulation/presentation. We need, however, to note that, despite recent efforts, there are still deficiencies among libraries located within the CMM territory. Several public libraries are under-equipped and do not have sufficient collections. The Salon du livre de Montréal book fair is an absolute necessity as a promotional activity. Between 1999 and 2003, attendance at the Montréal book fair was around 120,000 visitors. Added to that are the major festivals, including Blue Metropolis and the Quebec Intercultural Storytelling Festival.

Development Factors

Training and continued professional development

Most Cégeps and all Montréal universities (including McGill and Concordia) offer degrees in Arts and Literature. The universities also offer postgraduate degrees in French studies, English studies, literature, linguistics, translation and semiology. At all levels, this training can be enriched by writers' workshops offered either through teaching institutions or through private organizations and teachers.

Research and innovation

Because of the way the book industry is configured, whereby small and medium-sized businesses are dominant, only a few publishers have the means to devote a portion of their budget to research and development. As e-books are on the horizon and may in the long term replace printed books, major efforts need to be made in this area.

Montréal's metropolitan region also includes a number of literary research centres including: the Centre de recherche interuniversitaire sur la littérature et la culture québécoises (Inter-university Research Centre on Quebec Literature and Culture – CRILCQ), the Centre interuniversitaire d'études sur les lettres, les arts et les traditions (Inter-University Centre for Studies on Letters, Arts and Traditions – CELAT), the Centre québécois de recherche sur l'archive littéraire de l'Université du Québec à Montréal (Université du Québec à Montréal's Quebec Centre for Research on Literary Archives), the Centre d'études québécoises (Quebec Studies Centre – CÉTUQ) of the Université de Montréal and the Gabrielle Roy Research Group at McGill University's Department of French Language and Literature.

Sites and equipment

While the production, printing and distribution infrastructure seems adequate, there is a problem in terms of circulation. As we saw above, the Montréal metropolitan region has a library network with a sufficient number of individual libraries but a number of deficiencies in terms of resources and equipment. However, we expect to see a lot of improvements resulting from the opening of the Grande bibliothèque du Québec near the Université du Québec à Montréal, which will offer free public access to more than four million documents. The library will house the collections of the Bibliothèque centrale de Montréal central library, including the Phonothèque, as well as the Magnétothèque collection and the collections of the Institut Nazareth et Louis-Braille. In addition, thanks to a $17.2 million contribution by the Quebec government, it will be able to purchase thousands of titles, in addition to sound recordings, DVDs and electronic documents. Quebec's new national library should also play a major role in driving the network as a whole, especially by enriching their collections.

Financing and support

A number of players are involved before a book ever gets to the customer: writers, publishers, printers, distributors and booksellers. Each of these is remunerated through book sales. For a book sold in the bookstore at $20.79 for example, the price breaks down as follows: the author receives an average of 10% as royalties, i.e. $2.08. The bookseller's share is $8.32 (40%), the distributor's share is $3.07 (15%), the publisher's share is $2.68 (13%) and the printers receive $4.64 (22%).

At the large discount superstores, the final price is often cut by 25%. The bookseller's margin is 15% of the cost price. Margins for authors, publishers and printers, however, do not change. These major superstores only sell titles that have already proven to be commercially viable and usually do not offer customer service or take orders.

In 1999-2000, books and libraries received $311 million from the three levels of government, i.e. $60 million more than they received in 1990-1991. These investments represent 19% of culture-related spending by public organizations.

Creators and companies can rely on assistance from the Conseil des arts de Montréal (Montréal arts council), the Canada Council for the Arts, the Conseil des arts et des lettres du Québec (arts and letters council of Quebec), the Société de développement des enterprises culturelles (Quebec cultural business development corporation or SODEC) and Canadian Heritage. SODEC administers the following programs: assistance to book businesses and specialized publishing, assistance to certified bookstores, SODEXPORT (assistance for exports and cultural reach), business financing and tax credits for book publishing. At the federal level, Canadian Heritage administers the Book Publishing Industry Development Program (BPIDP), while the Canada Council for the Arts manages a Book Publishing Support program for publishers, translators and promotors of Canadian books. The Royal Bank of Canada also administers a Loan Program for Book Publishers (LPBP).

Because they are negotiable, copyright rates can vary tremendously. In general, however, authors are paid close to one-tenth of the final book sale price. The ancillary rights (sales of rights abroad, translation, book clubs, movie or television adaptation, etc.) can be retained by the author, but the author often assigns management of this to the publisher. Income paid by third parties is then shared between the author and the publisher, with the author generally receiving between 50% and 65% of the amounts collected.

The Canadian government annually pays $8 million to authors whose works are in public libraries. Quebec authors received $2.5 million of this discretionary amount. The payment of royalty rights increases with the number of libraries who bought the book, subject to a maximum established each year.

In Quebec, any person or organization (teaching establishment, government, private photocopy service provider, etc.) who wishes to reproduce a printed work must contact the Société québécoise de gestion collective des droits de reproduction (Quebec corporation for collective management of reproduction rights - COPIBEC) in order to obtain occasional authorization or acquire an overall reproduction permit.

This corporation, created by the Union nationale des écrivains du Québec (Quebec national writers union - UNEQ) and the Association nationale des éditeurs de livre (national association of book editors – ANEL) in 1997, ensures the management of these rights, grants reproduction authorizations (which can provide for various control mechanisms, exhaustive declarations, surveys, samplings, etc.) and collects, administers and distributes the royalties from users. The distribution of royalties is 50% to authors and co-authors, illustrators, translators, etc. and 50% to the publishers.

Networking and collaboration

The various stakeholders of the book industry are represented by associations who protect their respective interests. Everyone, from the writers (UNEQ) to the publishers (ANEL) to the booksellers (Association des librairies du Québec – ALQ), have become organized in order to strengthen their sector of activities.

Some Figures

Book Publishing in Quebec

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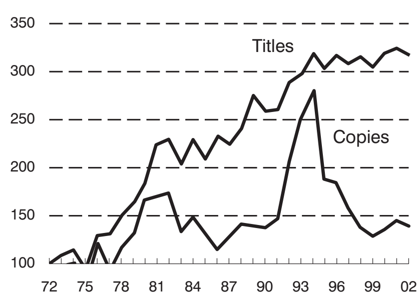
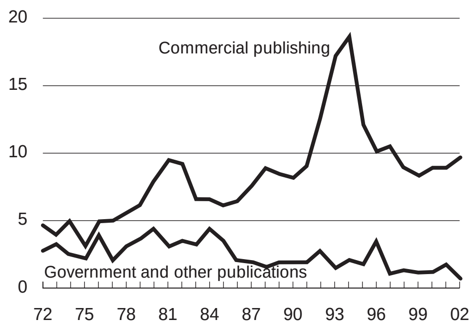


Source: Institut de la statistique du Québec

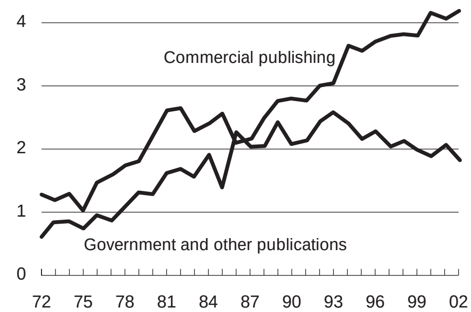
Books and Literature

Some Figures

Books Produced in Quebec



Book publishing in Quebec



Main Statistics on Commercial Publishing in Quebec, from 1994-1995 to 2000-2001

	Unit	1994-1995[1]	1996-1997	1998-1999	2000-2001
Establishments[2]	#	143	183	234	205
Total sales	$mil	488.5562	467.2475	511.9357	525.6533
Jobs	#	2052	2049	2214	2744
Full time	#	1778	1730	1930	2340
Part time	#	274	319	284	404
Total net sales	$mil	463.3063	442.8694	470.091	484.1573
In Canada	$mil	390.3868	377.5499	407.9931	421.7106
Abroad	$mil	72.9195	65.3195	62.0979	62.4467

1. Businesses with less than $50,000 in income were not included.
2. Includes publishing companies, as well as exlusive publishers and distributors.
Source: Statistics Canada, Survey of Book Publishers and Exclusive Agents.
Compiled by: Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec.

Main Statistics on Journal Publishing in Quebec, from 1993-1994 to 1998-1999

	Unité	1993-1994	1994-1995	1996-1997	1998-1999
Journals	#	451r	381r	395	489
French journals[1]	#	380r	323r	334	416
Total sales	$mil	296r	254r	294	345
Jobs	#	2,997r	2,566r	2,557	3,381
Full time	#	1,213r	988r	1,099	1,310
Part time	#	417r	399r	324	486
Volunteer	#	1,367r	1,179r	1,134	1,585

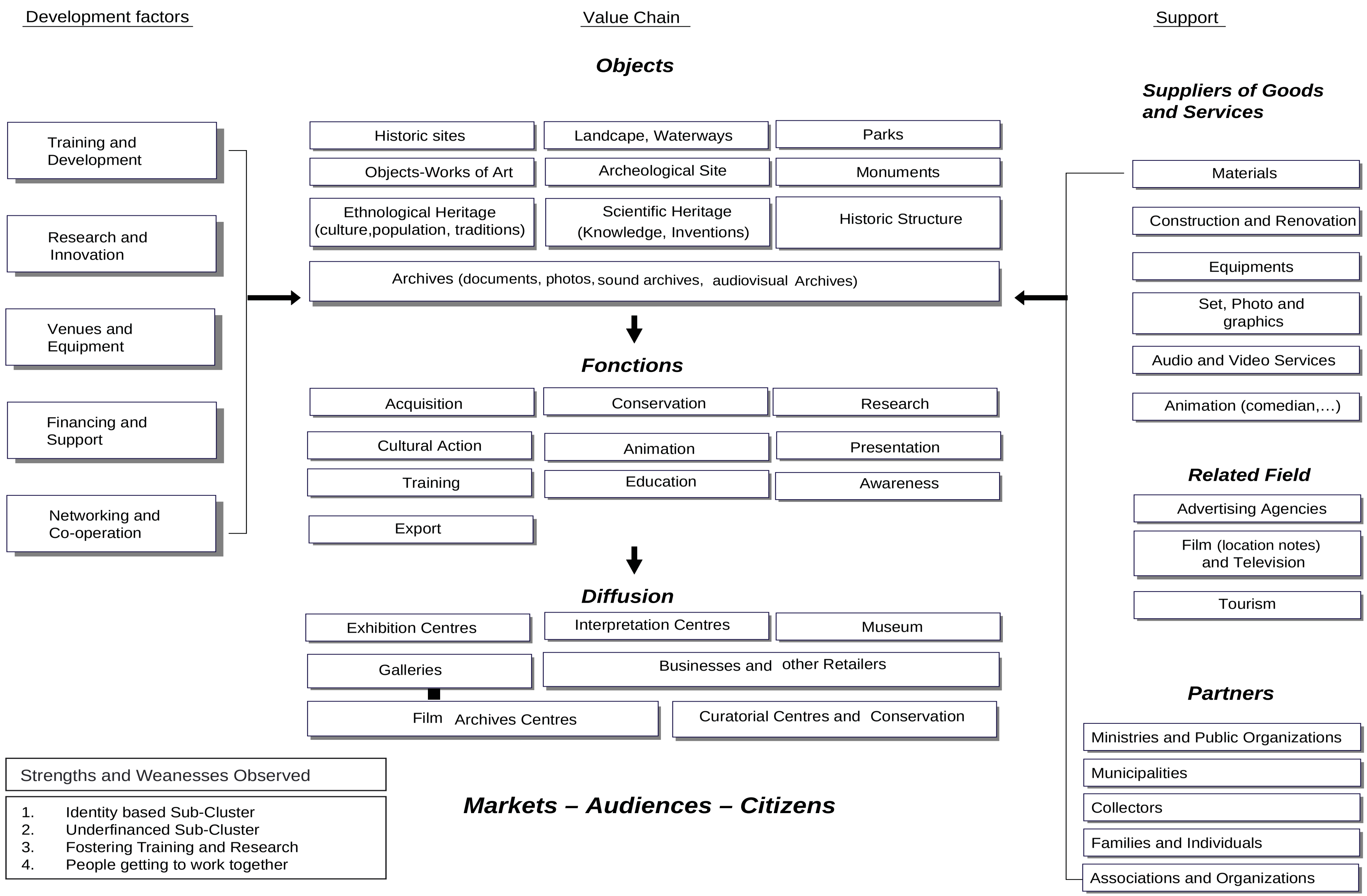
1. Includes periodicals in French and English.
Source: Statistics Canada, Periodical Publishing Survey.

Sub-cluster

Heritage and Museology

Memoirs, Testimonials and Identity Development Factors

Sub-Cluster – Heritage and Museology



Memoirs, Testimonials and Identity

The field of heritage and museology – which also includes archives – is a completely separate domaine in the cultural sphere. Here, we have elected to represent it as a cultural chain by putting the accent on the various functions that are related to it, rather than on creators, as was the case for the other sub-clusters.

Heritage and museology is a vast and complex field that is difficult to define and delineate. The Advisory Committee on Quebec's Cultural Heritage Policy, presided over by Roland Arpin in 2000, proposed the following definition: "Heritage refers to any tangible or intangible object or collection a community appropriates by recognizing its value as testimony and historical record, and by highlighting the need to protect, conserve and develop it." This notion includes both the general and the specific, from world heritage to family heritage, and national, regional and local heritage as well.

The notion of heritage covers cultural as well as natural heritage. The latter integrates the aspects of landscape, nature preserves and waterways. For example, Mount Royal Park is considered - and rightly so – to be part of our national heritage.

Cultural heritage can be divided into tangible and intangible heritage. Tangible heritage includes immovable property (historic monuments), moveable property (objects and works of art), archeological items (sites and objects), archive and documentary items and heritage spaces (historic districts, sites, protected areas), while intangible heritage includes ethnological matter (popular culture, know-how and traditions), scientific and technical elements (knowledge and inventions), sound archives and audiovisual recordings as well as other artistic items (films, videos, etc.).

Archives constitute first and foremost a documentary source for both professional and amateur researchers, (especially for genealogy in the latter case). Preserving and showcasing archives pose numerous major conservation difficulties. However, new technologies that make it possible to convert archives to electronic formats have made it possible in the past few years to set up new means of presentation/circulation, especially through virtual exhibitions.

Within the notion of heritage, there is also the notion of **museology,** which groups three types of museum-like institutions: museums, which carry out acquisition, conservation, research, education, cultural action and presentation; exhibition centres, which fulfil the functions of research, education, cultural action and presentation; and interpretation centres, which are dedicated to conservation, awareness and presentation.

Restoration activities also fall within this cluster configuration. These involve the repair and reconstruction of buildings, monuments and heritage works or objects.

Development Factors

Training and continued professional development

Programs for management, conservation, archiving, art history and museology are offered by most Montréal universities. However, none of the universities offer continuing education programs in this field. The Société des musées québecois (Quebec Museums Society) offers a major training and professional development service. Training sessions involve management and work organization, as well as museology itself. Montmorency Cégep, meanwhile, teaches one of the only Cégep-level training programs specialized in museology techniques.

Research and innovation

Dozens of local and national groups, as well as numerous heritage consulting firms have put together heritage inventories and studies, most of the time with government financial aid. These works make it possible to provide rich material for publication or interpretation (monographs, signage, commemoration and heritage walks and itineraries).

Universities also play an active role. Among other things, there is the the historical demographics research program from the Université de Montréal, studies by the INRS in Urban Planning – Culture and Society, as well as a major body of research carried out by the Canadian Centre for Architecture. Finally, there are also numerous archival research projects being carried out, particularly in the field of genealogy.

Sites and equipment

The terms of the Quebec Cultural Property Act, which describes the distribution of protected immoveable cultural property, indicates that the Montréal metropolitan region has two historic districts, one natural district and three architectural sites, 105 classified historic monuments, 12 classified historic sites, 21 classified historical areas with monuments, three classified historic sites with monuments and 46 protected areas.

The Montréal metropolitan region has 150 museum institutions, including 90 on the Island of Montréal, devoted to the arts, architecture, archaeology, history, science and technology and natural sciences. Note that, among other things, the presence of major museums, including the Montréal Museum of Fine Arts and the Museum of Contemporary Art, contribute to the region's outreach. Also worthy of mention is the presence of the very important *Centre d'archive du Québec* (Quebec Archives Centre) in Montréal.

Financing and support

The various levels of government support the field of heritage and museology through the Canadian Heritage Minster and the Culture and Communications Ministry in Quebec. The municipalities also play a role in this area.

However, we must note that heritage and museology are suffering from under-funding. While overall funding of this sector has increased in the past years, this increase seems to be focused on the major museums and on support for religious heritage.

Networking and collaboration

Numerous associations work on the conservation, presentation and promotion of heritage items and elements. Among those deserving of mention are the expertise of Heritage Montréal and the Board of Montréal Museum Directors. These groups make it possible for sector players to carry out joint projects. For example, Montréal Museum Day is an open house activity that this year involved 30 museums. Nearly 120,000 people visited at least one museum on that day, which contributed to making people better aware of the diversity of Montréal's museums.

Some Figures

Profile of heritage establishments[1] in Quebec, from 1991-1992 to 1999-2000

	Unit	1991-1992	1992-1993	1993-1994	1995-1996	1997-1998	1999-2000
Establishments	#	370	374	360	363	365	413
Visits	'000s	14,218	14,976	14,616	13,746	14,442	15,516
Total income	$mil	279	291	275	315	305	341
Jobs	#	5,566	5,956	5,810	5,461	5,070	5,797
Full time	#	2,512	2,478	2,477	2,623	2,290	2,550
Part time	#	3,054	3,478	3,333	2,838	2,780	3,247
Volunteer	#	3,011	4,112	4,045	3,629	3,588	3,711

1. Excludes natural parks.
Source: Statistics Canada, Survey of Heritage Institutions.
Compiled by : Institut de la statistique du Québec, Observatoire de la culture et des communications du Québec.

Sub-cluster

Inter-regional links

Elsewhere in Quebec
Elsewhere in Canada

Elsewhere in Quebec

The Montreal metropolitan region constitutes the main cultural hub in Quebec, as much in terms of creation and production as distribution. That being said, there are artists and authors found throughout the province as well as cultural organizations and companies, and venues and events that nurture Montréal's cultural activity and are in turn nurtured by it. For example, the Montréal arts community is enriched each year with the contribution and input of creators from all regions of Quebec, and there are many shows created and produced in Montréal (song, comedy, theatre and dance) that go on tour in Quebec each season. Information surrounding these cultural exchanges can be grouped under two territorial subsets: on one hand the City of Quebec and its surrounding region and on the other hand all the other regions of Quebec.

Quebec City and its surrounding region

Quebec City is the second-largest cultural hub in Quebec. This city is recognized for its exceptional heritage and for its intense cultural life.

As the provincial capital of Quebec, the city has numerous assets. We should mention among other things the presence of institutions whose reach exceeds the territorial limits of the Quebec metropolitan region, i.e. the Quebec National Museum of Fine Arts, the Museum of Civilization, the Grand Theatre of Quebec, the Quebec Conservation Centre, etc.

An historical gem, Quebec City is also a city of festivals with among other things its major Summer Festival devoted to music, its Carrefour international de théâtre international theatre showcase and its Fêtes de la Nouvelle-France (New France festivities) that re-create the rich history of that era.

As a university town, it also has many training centres such as music and theatre conservatories, crafts schools and many schools in the various visual arts fields.

As a place of creation and production it can rely on a pool of experienced authors and artists in the fields of visual arts, crafts and performing arts.

The other regions of Quebec

The other regions of Quebec are grouped here, although they do not necessarily have the same realities. While the regions peripheral to Montréal constitute a special case due to their proximity to the Montréal market, it is quite a different thing for outlying regions such as the North Shore or Abitibi-Témiskamingue. All of the regions, however, have specific cultural activities depending on the density of their population and their cultural heritage. Creators – artists, sculptors, writers, potters, singers, musicians, comedians, actors – live there, present there or produce there.

Major efforts have been devoted over the course of the last 30 years to promoting and presenting culture, resulting in a network of quality sites and events that cover the entire province. Libraries, museums, interpretation centres, theatres, exhibition centres, trade shows and festivals (including Rouyn-Noranda's very popular Film Festival in Abitibi-Témiskamingue, the International Poetry Festival at Trois-Rivières, the Victoriaville Festival de musique actuelle contemporary music festival, and the Semaine de la marionnette de Jonquière puppet showcase) make it possible for all Quebeckers to have access to Quebec's cultural production and, to a lesser extent, foreign production as well.

Elsewhere in Canada

Toronto, Montréal and Vancouver are the three largest census metropolitain areas (CMAs) in Canada and the three largest cultural hubs in Canada. As an illustration, in 2001, 64% of all people employed by cultural industries were located in those cities. As a comparison, we should mention that these three CMAs include only 52% of the total active population of all Canadian CMAs.[18]

The Toronto metropolitan region ranks ahead of Montréal, according to data available for most cultural sectors. The Montréal metropolitan region however arrives on top of the list for everything regarding performance arts. The Montréal metropolitan region also has more companies than Toronto in industries related to film production, book publishing and sound recording, although the income earned is generally lower.

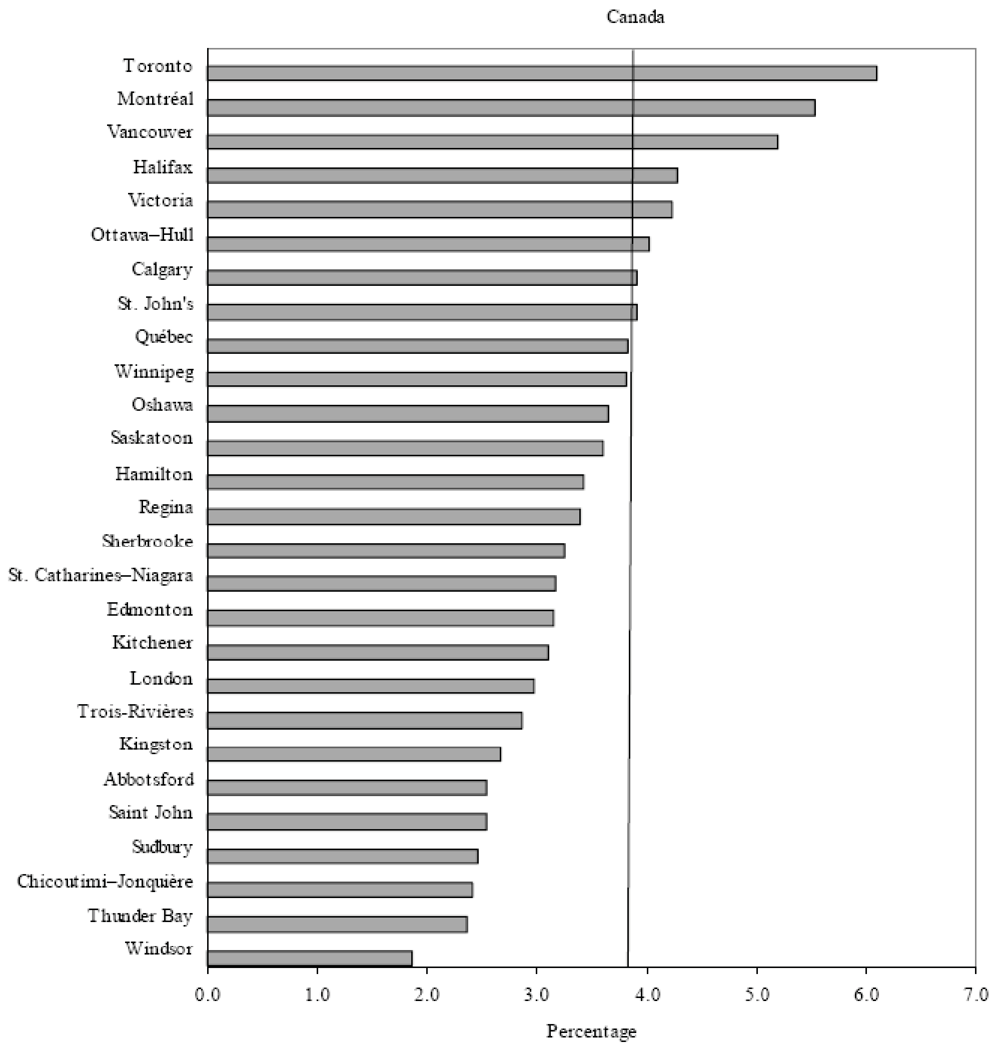
Other Canadian metropolitan regions also have major cultural sectors. We should note among others the cities of Vancouver, Winnipeg, and to a lesser degree Halifax, with respect to film production. The Ottawa-Gatineau and Winnipeg regions are also very dynamic in performance arts. It goes without saying that the Ottawa-Gatineau region can count on considerable support by national Canadian institutions.

Cultural industry employment data place the Victoria and Vancouver regions at the head of the list, followed by Toronto, Montréal and Ottawa-Gatineau. The strength of the Victoria region mostly comes from jobs in the fields of performance art, visual arts and literary arts.

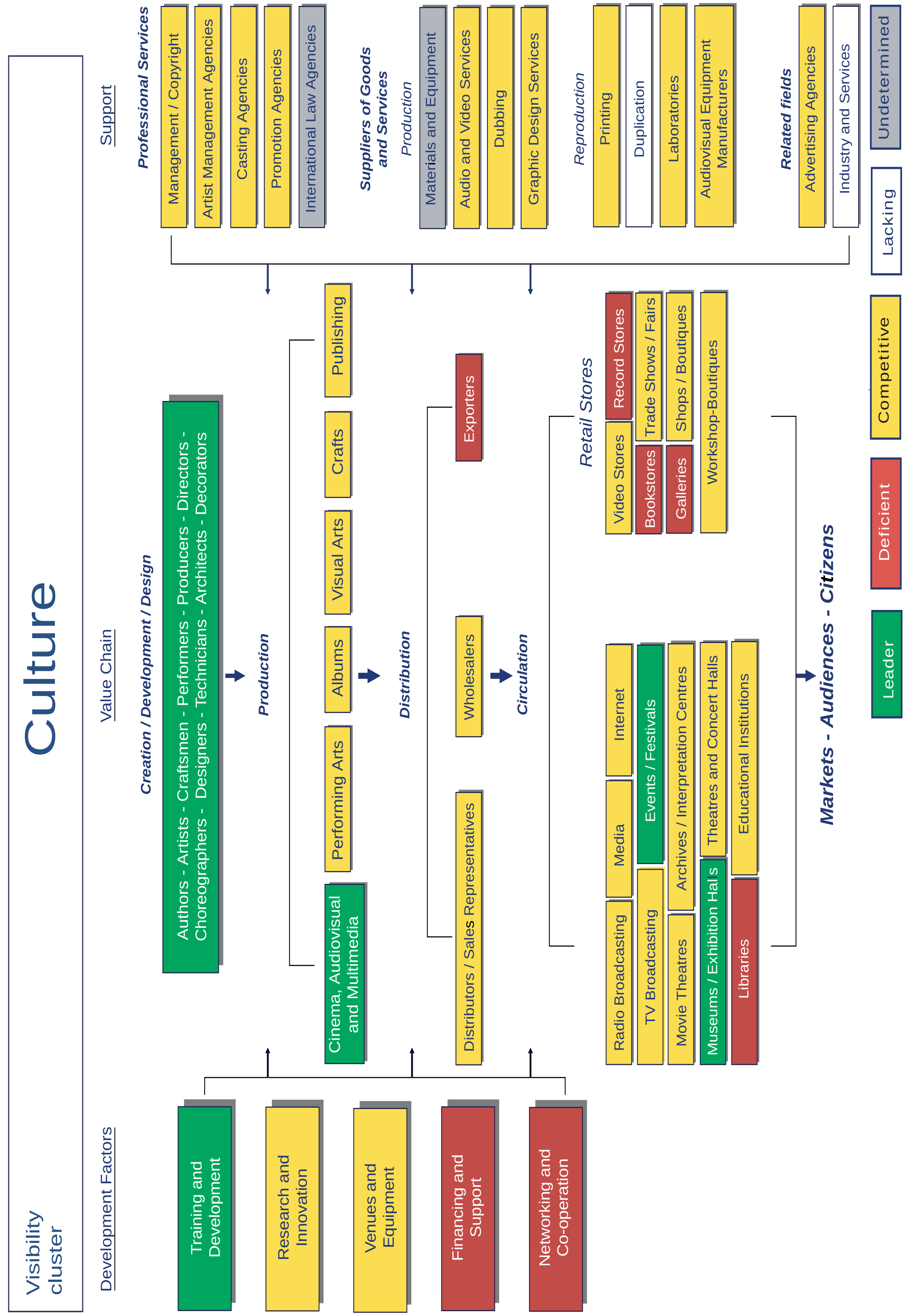
The regions of Toronto and Montréal also stand out from other Canadian CMAs with respect to net internal migration in absolute terms. Their internal migration for the various cultural sectors was much higher than their internal migration for other sectors. We must also note that both regions attract and retain a large part of workers associated with the various cultural fields.

18 Census Metropolitan Areas as Culture Clusters, Trends and Conditions in Census Metropolitan Areas, David Coish, Statistics Canada – Culture, Tourism and the Center for Education Statistics, October 2004. All statistics in this section come from this analysis.

Percentage of labour force in culture industries, by CMA, 2001



Perceptions


Culture
Visibility cluster
Development Factors
Value Chain
Support
Training and Development
Research and Innovation
Venues and Equipment
Financing and Support
Networking and Co-operation
Creation / Development / Design
Authors - Artists - Craftsmen - Performers - Producers - Directors - Choreographers - Designers - Technicians - Architects - Decorators
Production
Cinema, Audiovisual and Multimedia
Performing Arts
Albums
Visual Arts
Crafts
Publishing
Distribution
Distributors / Sales Representatives
Wholesalers
Exporters
Circulation
Radio Broadcasting
Media
Internet
TV Broadcasting
Events / Festivals
Movie Theatres
Archives / Interpretation Centres
Museums / Exhibition Halls
Theatres and Concert Halls
Libraries
Educational Institutions
Retail Stores
Video Stores
Record Stores
Bookstores
Trade Shows / Fairs
Galleries
Shops / Boutiques
Workshop-Boutiques
Markets - Audiences - Citizens
Professional Services
Management / Copyright
Artist Management Agencies
Casting Agencies
Promotion Agencies
International Law Agencies
Suppliers of Goods and Services
Production
Materials and Equipment
Audio and Video Services
Dubbing
Graphic Design Services
Reproduction
Printing
Duplication
Laboratories
Audiovisual Equipment Manufacturers
Related fields
Advertising Agencies
Industry and Services
Leader
Deficient
Competitive
Lacking
Undetermined

Relational Assets

Necessary Cooperation among Stakeholders

The Montréal metropolitan community territory has a large number of associations and networks that group the stakeholders of the cultural communities. Numerous collaboration activities are carried out by these associations, whether individually or as a group. An example is the work accomplished by the Mouvement pour les arts et les lettres du Québec (Quebec movement for arts and letters – MAL), which is a group formed by the various associations, or the work carried out by Culture Montréal, which is a group of individuals.

Despite the existence of these networks and the real efforts that are devoted to them, the great majority of stakeholders in the community recognize that the actions taken have been up to now insufficient and that there is no real cooperation among the various groups or associations in the field.

It can be supposed that that is due, at least in part, to the very structure of the cultural community, which is based on creators whose activity is primarily individual. But this particularity is not the whole reason for the lack of collaboration, and is not insurmountable. Other factors, such as the lack of financial and human resources, should also be taken into account.

We also observe that the ties that should exist between cultural communities and other educational, social and economic communities are still very tenuous. It is in fact paradoxical to note that there are very few relations with the business world, although the cultural sector is constantly confronted with nearly chronic under-financing. If the business world is often stand-offish in the way it receives the very few calls it does receive, it is no doubt because, through lack of knowledge, it has a very poor understanding of this sector that is so different from itself. However, elsewhere on the planet – and even putting aside the situation that is prevalent in the United States that is related to a very different tax environment – very good examples of the efficacy of bringing the economic and cultural communities closer do exist. Also, some people are surprised at the lack of communication among the cultural, educational and social sectors, although they would do well to join forces.

Developing closer ties among the various cultural community groups

The various sectoral associations of the cultural community play a major role in developing and promoting their discipline and their field of activity by offering an entire series of services and activities that are related to the needs of their members (forums, colloquiums, conferences, Internet sites, award ceremonies, training and continued professional development). However, these actions are mainly based on their own sector of interest. Few activities are aimed at collaboration with other associations, let alone with other fields. We can certainly imagine that it would be good to develop such common activities. This kind of collaboration would have the dual advantage of promoting closer ties among the members of the associations concerned and of sharing the costs related to those activities.

Interconnecting cultural, economic, social and educational networks

Most of the time, the cultural sector operates in a world that is separate from the economic, educational and social communities. All of these communities have associations that represent them, and all have well-established networks. But they act in parallel to one another. Actions should be taken to not only bring these communities closer but also to interconnect them. This interconnection would be beneficial to everyone and must be achieved by establishing common projects that are designed and developed especially for that purpose. In fact, up to now the various attempts to bring the communities closer have generally been carried out by a single partner asking for one or several other partners to participate and/or finance their project. It is possible to believe that a different approach based on needs and interests of all the players and that is drawn up with their common participation would give even more positive results.

Let us salute in this regard the actions carried out by the regional cultural councils located in the metropolitan region and by Culture Montréal. As an example, Culture Montréal is an independent not-for-profit organization that is intended as a foum for reflection, collaboration and intervention oriented to the cultural communities, political decision-making bodies and citizens. One of the main objectives of Culture Montréal is to assert the role of culture in the development of the city by, among other things, encouraging the participation of the professional cultural communities in the life of the communities.

Main Issues

Acting on Supply
Developing Demand

Acting on Supply

Increasing financing for research, creation and innovation

Creativity is one of the main assets of the Montréal metropolitan region. There is an atmosphere in Montréal where creative works are valued not only due to their singularity (the language used, the diversity of the communities and the narrow market all combine to promote innovation) but also due to an economic system composed of leading artists, stimulating companies, large-scale events and even a real «star system» of its own. This creative vitality also has the particularity of being distributed throughout all cultural disciplines which is, in itself, another of its strengths.

Innovation is also the trademark of Montréal creators who have the advantage of being particularly versatile, knowing how to enrich their work from one medium to the next. This is how a visual designer, for example, can in the course of one year work on the scenography for a play, on the setup for a museum exhibition, on the décor for an audiovisual production or prepare an exhibition of his or her own works to be shown in a private gallery.

However, we see that research and creation are too often done by individuals alone. Organizations and enterprises do not always have the financial means or the reflex to go back to those essential stages, except on rare occasions. To promote the emergence of new works we must therefore ensure the protection of experimental platforms of contemporary creation by investing more financial means and by putting in place mechanisms that promote risk-taking, innovation and the next generation of creators.

Investing in a certain number of infrastructures

It is widely recognized that the Montréal metropolitan region has a large number of presentation infrastructures. Theatres, museums, exhibition halls, historical sites, libraries and movie theatres are located everywhere in the territory; this is due, among other things, to the major investments that have been made over the course of the last 30 years. Some people say that there is an over-abundance of sites compared with demographic considerations in some fields; this would be in particular the case in the field of performing arts, where the number of seats offered is far in excess of demand.

Paradoxically, several venues are under-equipped technically and technologically. Others would need an upgrade in order to maintain their status. We can imagine that sharing and pooling resources would make it possible to better use the existing infrastructures and that the creation of cultural hubs like the Quartier des spectacles would ensure the requalification of some of them.

It also remains that certain major presentation equipment remains to be installed in Montréal, starting with the famous Montréal Symphony Orchestra concert hall. Some deficiencies also exist in terms of creation/production infrastructures and in the network of artist studios. These sites are, however, the very fermentation grounds for Montréal's creative activity. The plan to have a central ticket office offering a single outlet for all show tickets is also among the structuring projects to be prioritized.

In the field of film and audiovisual, the implementation of a new independent organization (NPO) to provide reception, promotion and development of the audiovisual industry – a measure that was brought up during the Forum metropolitain de l'industrie cinématographique (Metropolitan forum for the film industry) in November 2004 – would in particular have the advantage of linking the promotion of Montréal and Quebec City as production sites for audiovisual sector development activities.

Finally, we should not forget that investments in infrastructures and cultural sites largely go beyond this field of activity. Cultural infrastructures and equipment are structuring elements for cities that revive neighbourhoods and become points of reference, meeting places and even emblematic sites.

Supporting and unifying the forms of assistance

While the Quebec cultural community – and consequently the Montréal cultural community – is the best-supported in Canada, everyone agrees to say that it is still an under-financed community especially at the creation level. Everyone also agrees to say that public financing will continue to play a large role, unless the current Canadian and Quebec tax systems are fundamentally changed.

That being said, most creators do not have the necessary financial resources to live off their art. Also the publishing, cirdulation/presentation and distribution industries operate on a very precarious financial footing. Consequently, in a period where there are cutbacks in public financing, it is necessary to remain on guard since maintaining and growing a vigorous cultural industry depend on it.

In fact, governments have an essential role to play in the maintenance and survival of cultural organizations. The Canadian and Quebec governments have understood this and have shown it in particular by carrying the torch of cultural diversity onto the international scene. The purpose of this notion of cultural diversity is to maintain the right of governments to intervene to protect and promote their culture, cultural works and cultural products against the laws of the free market. This approach is justifiable since cultural goods are not goods like other goods. They are the bearers of cultural identity.

A harmonization of subsidy programs (forms, criteria, dates, etc.) is desirable in order to facilitate the applications process. However, the fact that there are so many subsidizing organizations and support programs is not actually the problem, although it is sometimes perceived as a very heavy factor in terms of administration. It is also a source of diversity. In fact, it contributes to Quebec's specificity. The development of alternative means could however be beneficial, including the establishment of a real dialogue between the culture sectors and the business sectors.

Reinforcing managerial training and encouraging continued professional development

The artistic training offered in the Montréal metropolitan region is considered by most stakeholders as being of a high level. To maintain this level of performance, creators and managers alike must constantly keep in mind the need for continued professional development.

There are, however, still some deficiencies. Among other things, we observe that there are few options available to people who have a career in the cultural community and who wish to acquire specific training in management, marketing and financing. Only HEC and the John Molson School of Business at Concordia University offer programs for future culture managers. HEC provides a post-graduate diploma specialized in managing cultural organizations (two streams: arts management or cultural industries management). Concordia offers a post-graduate diploma in managing cultural organizations and events (Graduate Certificate in Cultural Affairs and Events Management). The cultural community should have the means to better develop its abilities in management, marketing, financing, management structure and export. We also observe a lack of resources with respect to high level continued professional development.

Also, while our technicians are very valued on the international level, there is a lack of human resources evident in several leading edge sectors that threatens to hinder consolidation and competitiveness in some cultural areas.

Developing Demand

Targeting public awareness and audience development

Cultural offerings are in abundant supply in the Montréal metropolitan region. In itself it is an excellent indicator of the vitality of the cultural community. It remains that it is necessary to develop new audiences to appreciate the wealth and diversity of these offerings.

Unfortunately, despite the discourse that continually repeats the importance of achieving audience awareness and development, few real efforts are devoted to doing so.

Few studies give equal treatment to the underground communities, but it seems clear that these non-traditional communities have seen sustained growth in the last few years.

It goes without saying that we have seen a certain isolation of cultural communities vs. other groups of citizens. These groups do not always feel concerned by the cultural offering proposed to them. If the consumption of cultural goods and the visits to cultural events or sites is levelling off or even slipping backwards in some cases, it is not only because citizens are solicited on all sides (sports activities, family, travel, Internet, video games, etc.) but also because the cultural practices that are offered are not always attuned to their needs.

Other avenues can also be exploited, in particular cultural recreation and amateur activities. Sensitivity to culture is often developed through such hobbies (drawing, music, singing, pottery, etc.).

Promoting diversity and fusion

Culture is a factor in social cohesion and integration. Cultural practices promote not only the development of individuals but also the development of a feeling of belonging. It helps decompartmentalize thought and weaves ties among communities with no discrimination. Culture also contributes to the enrichment of a society.

The ethnocultural diversity of the Montréal metropolitan region is justly considered as an asset. We observe, however, that few efforts are devoted by cultural communities to get in touch with the various different communities among the general population. In return, these communities do not show high attendance for the activities offered. These communities can of course have the legitimate desire to retain their own culture and to want their own place before feeling strong enough to coexist and enter into a dialogue with the predominant culture.

That is why it is necessary to take action to invite members of ethnocultural communities to develop real ties and real interconnections. This kind of fusion will only help further stimulate the creativity of the region.

Establishing a strategy for attraction

Culture is a major factor for attraction. It attracts tourists, academics and investors, and promotes creativity in all areas of society. Consequently, it is a source of economic wealth and development for the Montréal metropolitan region.

The cultural force of Montréal and its region should be part of a true strategy for attraction, a new signature that is aimed at profiting from the unique atmosphere and exceptional quality of life in this city.

This strategy should, in particular, promote the arrival of foreign filmmakers and the growth of the major Montréal cultural events which would make it possible to overcome the chronic deficit that is observed in terms of receiving foreign shows. Hosting international events has the advantage of stimulating emulation by the cultural communities, promoting a confrontation of genres, encouraging exchange and reciprocity, opening new horizons for audiences and increasing the positioning and reputation of a region, thereby bringing about international networking opportunities that lead to presenting the works, products, knowledge and expertise of the Montréal metropolitan region abroad.

Developing markets

In addition to the efforts to be made to put in place a real attraction strategy, some thought must be put into promoting the circulation/presentation of the cultural offering produced in the Montréal metropolitan region in order, in particular, to surmount the limitations inherent in the small size of our market.

Reflexion needs to take place on three levels, corresponding to distinct territorial scales for which presentation strategies could be elaborated, i.e., then from within the metropolitan region to the rest of Quebec, and from within the metropolitan region to international markets.

Conclusion

Maintaining an Essential Critical Mass

The Montréal metropolitan region has a major concentration of resources whose excellence is recognized on national and international levels. In all fields of culture the city has skills and professional expertise that are simply out of the ordinary. These talents ensure the city a dynamic and fertile cultural life, a constant capacity for renewal and a generous pool of specialized resources.

The Montréal metropolitan region is affirmed at once as a training, research, creation, production, presentation and conservation centre. A prodigious centre for creation, it has a multitude of artists who have chosen to exercise their art in a propitious and stimulating environment. An exception production hub, it can rely on a large number of very well-known organizations and enterprises in all cultural disciplines. A major site for presentation offering a huge diversity, Montréal is supported by major popular events that are unique in the world.

This concentration of very diverse resources constitutes a rich asset and a major leveraging factor. It is the critical mass that makes it possible for the city to stand out among the international competition. Few metropolitan regions can, however, claim such a rich concentration of talent, venues and institutions. It is through the diversity, wealth and concentration of its creativity that the Montréal cultural community stands out from its competition. But this convergence of elements is still fragile and needs to be consolidated, since the risk of dissolution is ever-present.

Culture is more than ever a leading partner for all economic and social agents of the Montréal region. The positioning of culture is a sufficiently important issue to enable us to recognize that a part of the future of our region depends on it. Everything that can be done in favour of showcasing the cultural sector will help to promote the development of Montréal and its metropolitan region.

Appendices

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