

PRINCE EDWARD ISLAND'S CULTURAL LABOUR FORCE



A SUPPLY AND DEMAND STUDY



MacPherson Roche Smith & Associates

CHARTERED ACCOUNTANTS AND MANAGEMENT CONSULTANTS

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Executive Summary

In November of 2007, the firm of MacPherson Roche Smith & Associates was hired to conduct a supply demand study of the Cultural Sector by the Prince Edward Island Cultural Human Resources Sector Council (PEI CHRSC). The primary objectives of the study were:

- The development of a profile of cultural workers on PEI
- An analysis of the supply and demand issues and challenges
- Identification of labour market shortages and surpluses and the development of a methodology to project future gaps
- A review of best practices in other jurisdictions in addressing incongruence between workforce training needs and supply
- Identification of strategies and specific activities to address the human resources issues identified throughout the study

To gain a detailed understanding of the supply of cultural workers on PEI a quantitative survey was developed. This survey provided a profile of the workers, attitudes and opinions about employment in the Cultural Sector, perceived opportunities for training, training needs and advancement, as well as future plans (intentions to switch careers or leave the workforce). Highlights of the findings of this survey used to generate the profile of the workforce are presented on the following page.

Profile of the PEI Cultural Sector Workforce

Highlights

Employment Status

- 70.1 % of PEI's cultural labour force is self-employed.
 - 80.6% of these workers work out of their home.
- 65% of cultural businesses employ less than 5 workers.
- 71 % of respondents work at least 40 weeks out of the year doing their cultural work.
- 68.5% respondents work 30 hours per week or more.
- 64.1% of cultural workers consider themselves to be career cultural workers vs hobbyist.

Training and Education

- 68.7% of respondents reported having formal cultural training.
- 47.1% have a University degree or higher compared to 21.5% of the PEI workforce.
- 48.7 % reported working in the cultural field over 15 years.

Employment Equity

- Women: 62.4%
- Persons with a disability: 9.8%
- Visible Minorities: 4.0%
- Aboriginal persons: 1.3%

Other Statistics

- The median income for the cultural workforce is \$ 27,936, compared with \$28,600 for the PEI workforce.
- The median age of the cultural workforce is 51.6, compared with 39.9 for the PEI workforce.
- Only 2.8% of respondents said they were unlikely to continue their cultural work.

Data with respect to human resources issues and challenges was collected through key informant interviews and validated via focus groups with representatives of the various sub-sectors of the cultural industry on PEI.

Based on the findings from these interviews as well as review of the literature and cultural labour force studies completed in other jurisdictions, it is clear that many of the issues and challenges of the PEI Cultural Sector are not unique to PEI. Moreover, many of the issues and challenges identified during this study are similar to those associated with being self-employed small business owners in various other sectors of the economy.

The 2006 Census accounted for 1670 persons on PEI working in the occupations composing the definition of the Cultural Sector. In this study demand forecast modeling using a regression predication model indicated that there is no serious shortage of cultural labour on PEI (with the possible exception of the New Media sub-sector). It is the opinion of many cultural workers that there is no lack of creative talent on PEI but that there is, again with the exception of New Media, a lack of opportunity for gainful employment in the Cultural Sector. Although there is a perception that the need to support existing cultural workers and improve their quality of life, rather than recruitment, should be more of a priority at this time, the worker survey also revealed a decline the number of new entrants into the Cultural Sector, a shift up in the age that people are entering into the field and a significant shift in the gender make-up of the workforce; all of which need to be addressed if the cultural industry is to prosper and grow.

This study has resulted in 6 key findings and recommendations, as follow:

Key Finding #1: *There is a strong and pressing demand for training and skills upgrading in the PEI Cultural Sector workforce.*

Recommendations:

- 1) Specific programs and supports for self-employed cultural workers be developed and promoted.
- 2) The PEI CHRSC respond to member's requests for training by developing sub-sector specific training modules to be delivered by the appropriate public and private training organizations.
- 3) The PEI CHRSC create and promote on-the-job training opportunities for young people.
- 4) The PEI CHRSC create and promote opportunities for cultural workers to transfer and share knowledge through the development of mentoring and apprenticeship programs and the hosting of networking sessions.

Key Finding # 2: ***The PEI Cultural Sector will be faced with unique challenges with respect to recruitment and retention.***

Recommendations:

- 1) Develop a strategy for succession planning that includes advocating educational experience in areas related to the cultural industries in the elementary and secondary school system (up to grade 12).
- 2) Participate in the development of programs that support people looking for further education related to the cultural industries after high school.
- 3) Participate as a Sector Council in Career Days at Island high schools and post secondary institutions.
- 4) Research the opportunity for and encourage hybrid careers within the sector. For example, promotion of opportunities for visual artists in the new media sector.
- 5) Work with those in the sector who employ people and who associate, for purposes of their work, with self employed people in an attempt to establish meaningful job

entry experiences or internship opportunities (e.g. cooperate with the University in creating co-op placements for business, computer science, music, writing, public administration, history, fine arts and classics students who may have an interest in future involvement in heritage, new media, writing, theatre, or visual arts careers).

Key Finding # 3: *There is an explicit and undeniable link between the tourism and cultural industries on PEI.*

Recommendations:

- 1) Propose a Memorandum of Understanding between the Canadian Tourism Commission, Tourism P.E.I., ACOA, Provincial Tourism, the Tourism Industry Association of P.E.I. and the Sector Council for the purpose of publicizing the opportunities in Tourism product development through the Island's growing cultural industries.
- 2) Identify opportunities for sharing resources and expertise between tourism and culture in preparation for the increasing demands of the cultural tourist for experiential tourism attractions.
- 3) Explore the Best Practices of other jurisdictions with respect to the sharing of resources and expertise between tourism and culture.
- 4) Host facilitated sessions with Tourism operators to gain a shared understanding of their needs and the potential offerings of cultural industries on PEI, and to create pilot projects that would form the foundation of new training and employment producing activities for participants and new entrants to any one of the cultural industry sub-sectors.

Key Finding # 4: *There is a need for unified leadership and management in the sector.*

Recommendations:

- 1) Explore the feasibility of the establishment of a cultural alliance or industry association to act as a unified voice for the Cultural Sector.
- 2) Examine the value of the establishment of a cultural advisory board for government.
- 3) Advocate for the use of Island cultural resources first.
- 4) Develop and distribute a resource guide that profiles support programs available.
- 5) Develop a central registry of culture workers in the province.
- 6) Monitor to ensure that government support programs are meeting the needs of the sector participants.
- 7) Ensure that new educational programs in the province meet the standards of the industry.
- 8) Provide an opportunity to celebrate Cultural Sector role models.
- 9) Explore ways in which the PEI Cultural Human Resources Sector Council and the PEI Council of the Arts could work more closely together.

Key Finding # 5: ***Culture is a major contributor to the PEI economy.***

Recommendation:

- 1) That the Cultural Human Resources Sector Council request the Provincial Treasurer to change the industrial classifications used in the calculation of GDP so that the Cultural Industries are accounted for separately.

Key Finding # 6: ***There is a requirement for enhanced support by government for the Cultural Sector:***

Recommendation:

- 1) That the Board of the Cultural Human Resources Sector Council request the Minister of Communities, Cultural Affairs and Labour to seek the concurrence of government in significantly enhancing the level of support to the Cultural Sector in accordance with the commitments made in the Province's official policy document.

1.0 Introduction

1.1 Project background and objectives

The Prince Edward Island (PEI) Cultural Human Resources Sector Council (CHRSC) is a not-for-profit organization formed in 2006, with the goal of identifying and addressing human resource issues in the PEI Cultural Sector. Essentially, the mandate of the Council is to act as a leader in strengthening the Cultural Sector on PEI by studying workforce related needs and developing viable solutions.

One of the issues identified by the PEI CHRSC in need of study was a requirement for data on PEI's demographics and human resources requirements. To this end, the PEI CHRSC issued a Request for Proposals (RFP) for a labour force study which would assess the PEI Cultural workforce and identify human resource issues. The results of this research study would be used to support strategic planning decisions in addressing the sector's human resource needs and for prioritizing mitigation strategies to be implemented by the PEI CHRSC. The study would also create awareness within the sector of the supply and demand issues which the industry is facing at the present time and can be expected to be facing in the years to come.

More specifically the objectives of the study were to:

- Define the characteristics of the labour force and produce a human resources profile of the PEI Cultural Sector.
- Uncover the supply issues and challenges, such as emerging skills requirements, training availability, recruitment and retention challenges.
- Analyze the demand issues by examining the trends facing the industry (including existing and planned projects) and complement this with a review of other comparable jurisdictions' workforce supply/demand practices.

- Identify labour shortages/surpluses and develop a methodology to project future gaps.
- Make recommendations with respect to innovative tools and/or best practices to address incongruence between workforce/training needs and supply.
- Make recommendations with respect to training needs, strategies and specific activities to address human resources issues.

1.2 Methodology

For the purposes of our research, the definition of an individual who works in the Cultural Sector or a “cultural worker”, was derived through two approaches, namely, (1) those individuals who provide their talent and time through employment in the Culture Sector to earn income and (2) individuals employed through enterprises that employ human resources to produce goods and services for profit within the Culture Sector.

At an industrial level “Culture” is defined by Statistics Canada to be “creative artistic activity and the goods and services produced by it, and the preservation of human heritage.”¹ Statistics Canada goes on to describe the “creative chain” through which culture goods and services are produced. Heritage however, is seen as a special case within the Culture Sector as the resulting product is not necessarily strictly goods and services. From this point of view the Cultural Sector is seen as the set of industries on P.E.I. that are involved in the creation, production, manufacturing, distribution and preservation of culture goods.

The above traditional approach, used by Statistics Canada, to defining a sector based on industry and business establishments is problematic when used in connection with culture as it highlights factors of business activity and production and workers strictly within that

¹ Canadian Framework for Cultural Statistics. The Culture and Statistics Program. Statistics Canada. August 2004.

setting. Fortunately, in a more recent document, Statistics Canada further defines the Culture Sector in Canada by producing a list of “culture categories”.² This document begins to bridge the gap between the Culture Sector as not only a set of business establishments, but also recognizing it as the set of occupations within which the Cultural Sector workers work. (See Appendix A)

A further refinement to the definition is provided by the Cultural Human Resource Council in their Building on Success Report. In this document they focus on the cultural and heritage labour force as “...occupations that are considered cultural based on the content of work, rather than the type of employer.”³ The report looks at occupations that are of a cultural nature rather than occupations within cultural industries and in doing so identifies a set of 45 cultural occupations. A subsequent report called “Cultural Sector Fast Facts” used this list of 45 occupations to develop a statistical overview of the sector.⁴ This list of occupations is shown in Appendix B.

For the purposes of our study, the definition of the Cultural Sector worker for PEI is based on the above mentioned list of 45 culture worker occupations with two additions. The additions are “Historians, Linguists and other professional occupations” with the statistical occupation code of E038 (NOC 4169) and “Retail Trade Manager – Art Dealer, Antique Dealer” with the occupation code of A211 (NOC 0621) . This definition is similar to the occupational definition offered in “PEI Cultural Human Resource Sector Council Baseline Profile”.

Consequently, the Cultural Sector labour force on PEI in this research is defined as:

² “Economic Contribution of the Culture Sector to Canada’s Provinces.” Culture Statistics Program. Statistics Canada. March 2007.

³ Canada’s Cultural Sector Labour Force. Cultural Human Resource Council. 2004. Pg. xv.

⁴ Cultural Sector Fast Stats. Cultural Human Resource Council. Spring 2004.

- All individuals 15 years of age and over residing on PEI whose employment can be categorized under the list of occupations shown in Appendix B. This target group will be referred to in this document as the “Cultural Workers”.

The age criteria of 15 and over is included to make the data set comparable to Census and Labour Force Survey data.

In order to gain a thorough understanding of the human resource needs of the sector and its sub-sectors a variety of data collection strategies were used. Research methodologies were designed to complement one another in a way that addressed all the study objectives including:

- An environmental scan and literature review to guide the development of the primary research methodology and identify the key trends and best practices in other jurisdictions,
- A quantitative worker survey to gather data with respect to the supply side of the analysis,
- Key informant interviews to gather data with respect to the demand side of the analysis, and;
- Focus groups to uncover information with respect to issues and challenges facing the sector.

1.2.1 Environmental Scan and Literature Review

During the environmental scan, a systematic review of relevant literature was conducted. The results were examined for external happenings in order to collect metrics and identify trends, forces and events likely to have political, economic, social and technological impact on the PEI Cultural Sector. The environmental scan was largely

conducted as in-depth **secondary research** involving a detailed literature search of relevant studies, reports, databases and news items. Data sources included⁵:

- Census and labour force data
- PEI Provincial Treasury statistics reports
- Previous national and provincial (PEI and other provinces) Cultural Sector reports.

Moreover, targeted in-person or telephone interviews with expert or key informants (employers, educators and government representatives) were also conducted to clarify, validate and/or expand upon information collected. The results of the secondary research were used to guide the development of the primary research methodology and form a part of this final report.

1.2.2 The Quantitative Worker Survey

To gain a detailed understanding of the supply of cultural workers in the province a quantitative survey was developed. This survey provided a profile of the workers, attitudes and opinions about employment in the Cultural Sector, perceived opportunities for training, training needs and advancement as well as future plans (intentions to switch careers or leave the workforce). Specifically the survey contained questions with respect to occupation, nature of employment, location, use of off-island services, unions/professional organizations, experience, education, training and income. The draft survey was piloted with several members of the PEI CHRSC Board of Directors and modified based upon their feedback. The final survey was administered through a telephone survey, sub-contracted to a third party professional marketing research organization, and was also made available on-line for cultural workers to complete and submit through a link on the MRS&A website.

⁵ For a complete list of literature reviewed see Appendix G.

The telephone survey was carried out through phone calls to lists of persons and organizations known to be active in the Cultural Sector. These lists were provided by the PEI CHRSC with a total of 300 questionnaires completed by telephone interview. The web based questionnaire was hosted on the “my3q.com” web site with the link to the questionnaire located on the MRS&A home page. Advertisements were placed in newspapers and e-mails were sent out to PEI CHRSC’s e-mail lists informing people of the survey and directing them to the web based questionnaire. An additional 107 persons responded to the web based questionnaire.

As a result this methodology produced 405 useable questionnaires. Based on an estimated population of 1670 that meet the criteria of the definition of the Cultural Sector workforce on P.E.I., it is calculated that the statistical confidence interval of the tabulated results is plus or minus 4.25 percent, 95 times out of 100.

1.2.3 Key Informant Interviews

Key informant interviews were conducted at two distinct times for this project. Initially, a select number (5) of key informants were interviewed to determine what kinds of information were needed for the industry to make informed decisions. This feedback was used to guide the development of the survey instruments. The key informants also provided valuable feedback with respect to the identification of later stage key informants and potential focus group participants. The goal of the later stage key informant interviews was to uncover the issues and challenges with respect to human resources from the demand side of the Cultural Sector, as well as the perceived future trends and challenges. The interviews were largely conducted on a one-on-one basis either by telephone or in person. Twenty-six interviews of 45 minutes to one hour were completed. The interviewees included at least 3 representatives from each of the eight sub-sectors and incorporated representation from employers, sub-sector associations and government support groups.

The interview questionnaire was developed by MRS&A and approved by the PEI CHRSC Steering Committee to ensure the completed questionnaire met all of the research criteria required for the completion of the project. Topics discussed included: management, funding/resources, marketing and promotion, evaluation/performance measurements, industry trends, demand drivers, workforce and employment and skills gaps. The closing question asked the interviewee to name the two biggest opportunities and threats for the Cultural Sector. The complete interview questionnaire is available in Appendix C.

1.2.4 Focus Groups

To compliment and validate the findings of the cultural worker survey and key informant interviews, five focus groups were conducted in March and April of 2008. Each focus group was dedicated to either one or two of the sub-sectors. Recruitment of focus group participants was carried out by MRS&A through advertisement, word of mouth and via e-mail invitations sent through the PEI CHRSC office. To ensure that each focus group was composed of a variety of occupations and backgrounds, respondents were instructed to contact the office of MRS&A for pre-screening and registration for their respective focus group session. The following table displays the locations, dates and times of each group.

Table 1 – Focus Group Schedule

Group	Date	Time	Location
Museums, Archives, Libraries and Heritage	Thursday March 27 th , 2008	6:30-8:30 PM	Charlottetown
Music & Sound Recording and Live Performing Arts	Monday March 31 st , 2008	6:30-8:30 PM	Charlottetown
Crafts and Visual Arts	Tuesday April 1 st , 2008	6:30-8:30 PM	Summerside
Film & Television and New Media	Wednesday April 2 nd , 2008	6:30-8:30 PM	Charlottetown
Writing & Publishing	Thursday April 3 rd , 2008	6:30-8:30 PM	Charlottetown

1.2.4.1 Focus group moderation

MRS&A provided professional and skilled moderators to conduct the focus groups as well as a note-taker for each session. Furthermore, each focus group was taped on a digital audio recorder, except in one instance due to equipment failure. Files containing the recordings were provided to the PEI CHRSC.

The moderator’s guide was developed by MRS&A and approved by the CHRSC to ensure that the completed guide met all of the research criteria required for the completion of the project.

The guide was structured as follows:

Introduction

- This segment enabled the moderator to introduce himself/herself and gave the participants an opportunity to introduce themselves. Participants were debriefed as to the background of the project.

Power Point Presentation of Survey Results

- The results of the telephone and online survey were presented, including results for the sector as a whole and the sub-sectors represented in the focus groups.

Discussion Topics

- Each focus group included discussion of the trends and themes discovered through the survey. The following themes were discussed with particular emphasis placed on the issue itself, responsible parties, and strategies.
 - Governance/Leadership
 - Product Development
 - Training
 - Marketing and Promotion

In closing, participants were asked to identify the priority issue in their respective sub-sector that required resolution.

1.2.5 Training Needs Assessment

Data with respect to the training needs assessment was derived through the quantitative cultural worker survey, but was validated and confirmed via the focus groups and a second quantitative survey. This second quantitative survey was composed of 7 questions which were built on information received during the focus groups. Respondents were asked to identify their priority training needs, as well as their preference with respect to training format, length, timing, location and price which would be expected to be offered for the Cultural Sector.

1.2.6 Data Analysis

1.2.6.1 Data Capture and Verification

The data for the training needs assessment was captured in two ways; by telephone interviews and through a web based questionnaire. The data was transferred to Excel spreadsheets and the two data sets were merged. Two types of validity checks were run on the data: (1) frequency tables for out of range values and (2) logic checks examining the consistency of answers between 2 or more questions. Miscoded data was corrected and a verified data set was produced for analysis.

The data analysis was performed using the Pivot Table function in Excel. Tabulations were constructed in consultation with the project Steering Committee. Comparisons with secondary data were done where available and appropriate.

2.0 Profile of PEI Cultural Workers

The 2006 Census accounted for 1670 persons working in the occupations composing the definition of the Cultural Sector. The cultural worker survey in this study was completed by 405 respondents. Based on the Census figures this is about 24 percent of the sector. The statistical accuracy of these results is calculated to be plus or minus 4.25 percent, 95 times out of 100.

2.1 Workforce Characteristics

2.1.1 Quick Overview

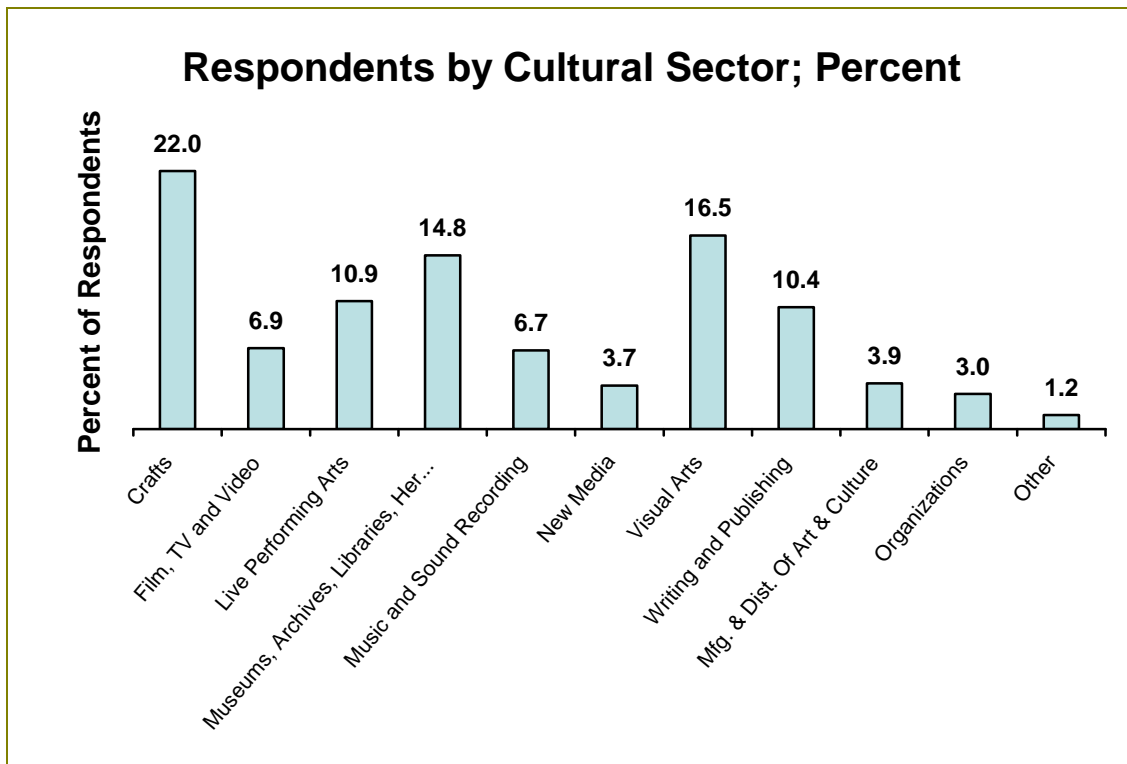
Based on the survey respondents, the following key characteristics of the cultural workforce are presented:

- 62.4 % of respondents were female. This is slightly higher than the 2006 and 2007 Labour Force Survey which identified 58.8 % and 53.3 % women participants, respectively.
- 70.1 % of respondents are self-employed. This is higher than the 44 % reported in the Yukon study and much higher than previous estimates for PEI. One explanation is that these lower estimates were based on industrial data which would include mostly people working for firms rather than working for themselves.
- Of the respondents that reported being self-employed, 80.6% reported working out of their homes.
- Of the self-employed respondents 30.3 % reported employing at least one other person in their business.
- Of those that reported employing others, 65 % employed less than 5 workers.

- 71% of respondents indicated that they worked at least 40 weeks or more per year and 68.5% said they worked at least 30 hours per week.
- 68.7 % of respondents indicated that they had formal cultural training.
- 47.1 % of the cultural workforce has a BA or higher, compared to 21.5 % of the total PEI workforce.
- The median income for the cultural workforce is \$ 27,936, compared with \$28,600 for the PEI workforce.
- The median age of respondents was 51.6, and 8.9 % reported being 65 and over. By comparison the median age of the PEI workforce in 2005 was 39.9 years.
- 48.7 % reported working in the cultural field over 15 years.

2.2 Detailed Results

Figure 1 below summarizes the percent of respondents by culture sub-sector.



As can be seen from Figure 1, the top three sub-sectors responding to the survey were the Craft sector at 22%, Visual Artists at 16.5%, and Museums, Archives, Libraries and Heritage at 14.6%. A more detailed break down of cultural worker by detailed occupation reported is available in Appendix D.

2.2.1 Employment status

Table 2 below shows the breakdown of respondents by employment status and sub-sector. Approximately seventy percent of respondents reported being self-employed. The sub-sectors with the highest level of self-employed workers are the Visual Arts, Crafts and Writing and Publishing.

Table 2: Respondents by Employment Status and by Cultural Sub-Sector

Cultural Sub-sectors	Employment Status	
	Self-Employed	Employed by Other
Crafts	89.9%	10.1%
Film, TV and Video	64.3%	35.7%
Live Performing Arts	65.9%	34.1%
Museums, Archives, Libraries, Heritage & Festivals	22.0%	78.0%
Music and Sound Recording	77.8%	22.2%
New Media	26.7%	73.3%
Visual Arts	92.5%	7.5%
Writing and Publishing	83.3%	16.7%
Mfg. and Dist. Of Art & Culture	75.0%	25.0%
Organizations within Culture Sector	50.0%	50.0%
Total	70.2%	29.8%

There was no indication that employment status was linked to gender as equal amounts of females and males were self-employed. There was some indication, however, that personal income for self-employed workers was lower than that of cultural workers working for an employer. Indeed, analysis of the detailed results indicates that 48% of self-employed workers are making less than \$30,000 annually, whereas only 23% of cultural workers working for an employer make less than this amount.

2.2.3 Gender and Age

Sixty-two percent of respondents to the workers survey were female. Table 3 below shows the breakdown of gender by sub-sector. The only two male dominated sub-sectors are Film, Television and Video, and Music and Sound Recording (marginally).

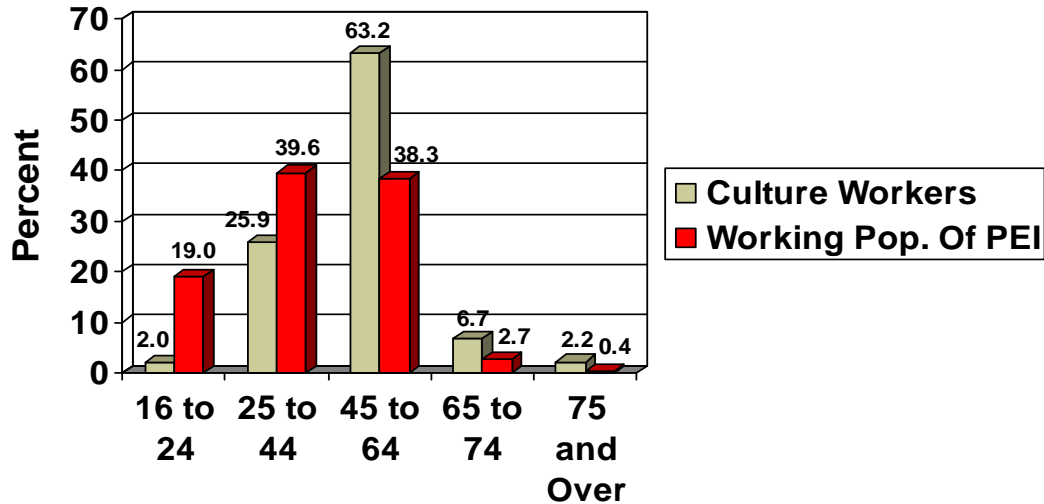
Table 3: Respondents by Gender and By Cultural Sub-Group

Cultural Sub Sectors	Gender	
	Male	Female
Crafts	29.2%	70.8%
Film, TV and Video	67.9%	32.1%
Live Performing Arts	30.2%	69.8%
Museums, Archives, Libraries, Heritage & Festivals	35.6%	64.4%
Music and Sound Recording	51.9%	48.1%
New Media	33.3%	66.7%
Visual Arts	38.8%	61.2%
Writing and Publishing	38.1%	61.9%
Mfg. and Dist. Of Art & Culture	31.3%	68.8%
Organizations within Culture Sector	50.0%	50.0%
Grand Total	37.9%	62.1%

A detailed breakdown of the age distribution of cultural workers responding to the survey compared to the PEI population is included in Figure 2 on the following page.

Figure 2

Culture Workers and Working Population of P.E.I. by Age Group



The cultural workforce in PEI is an aging group. The median age of cultural workers in PEI is 51.6 compared to the median age of the working population in PEI which is 38.3. Furthermore, only 2% of workers age 16-24 are entering into the Cultural Sector compared to 19% entering the PEI workforce as a whole. The data above was further broken down to show age by sub sector of employment below in Table 4.

Cultural Sub-sectors	Age Groups				
	16-24	25-44	45-64	65-74	75 and Over
Crafts	0.0%	20.2%	69.7%	10.1%	0.0%
Film, TV and Video	0.0%	28.6%	67.9%	0.0%	3.6%
Live Performing Arts	4.5%	27.3%	61.4%	6.8%	0.0%
Museums, Archives, Libraries, Heritage & Festivals	0.0%	25.4%	71.2%	3.4%	0.0%
Music and Sound Recording	3.7%	33.3%	48.1%	11.1%	3.7%
New Media	20.0%	60.0%	20.0%	0.0%	0.0%
Visual Arts	3.0%	22.4%	65.7%	4.5%	4.5%
Writing and Publishing	0.0%	9.5%	71.4%	9.5%	9.5%
Mfg. and Dist. Of Art & Culture	0.0%	37.5%	50.0%	12.5%	0.0%
Organizations within Culture Sector	0.0%	58.3%	33.3%	8.3%	0.0%

This table indicates that most cultural professions are not being entered into until age 25, with the exception of New Media. This finding can be further explained by looking at the Education levels of the sector as well as years of experience data presented below.

2.2.4 Education and Years of Experience

When asked about the highest level of education achieved, respondents were found to be highly educated. More than 47% of respondents reported having completed a University degree and approximately 26% reported having a college diploma (See Table 5 below). This could partially explain the late age of entry into many of the cultural professions.

<i>Table 5: Q. What is the highest or last level of education that you completed?</i>	
Response	Percent
Less than high school graduate	1.7
Graduated high school (includes GED)	11.5
Some college or university, but did not complete the program	13.0
Completed a college program	26.7
Completed a university degree	32.7
Working on or completed a post graduate degree	14.4

Respondents were also asked to indicate their years of experience in their field of cultural work. The responses are included in Table 6.

Cultural Sub-sectors	Years Experience in Field				
	Under 5	5 to 15	16 to 25	26 to 49	50 and Over
Crafts	9.0%	47.2%	22.5%	21.3%	0.0%
Film, TV and Video	14.3%	39.3%	7.1%	35.7%	3.6%
Live Performing Arts	4.5%	31.8%	27.3%	36.4%	0.0%
Museums, Archives, Libraries, Heritage & Festivals	11.9%	39.0%	30.5%	18.6%	0.0%
Music and Sound Recording	7.4%	44.4%	18.5%	18.5%	11.1%
New Media	71.4%	28.6%	0.0%	0.0%	0.0%
Visual Arts	15.4%	24.6%	32.3%	24.6%	3.1%
Writing and Publishing	7.5%	32.5%	20.0%	35.0%	5.0%
Mfg. and Dist. Of Art & Culture	20.0%	40.0%	20.0%	20.0%	0.0%
Organizations within Culture Sector	25.0%	66.7%	8.3%	0.0%	0.0%

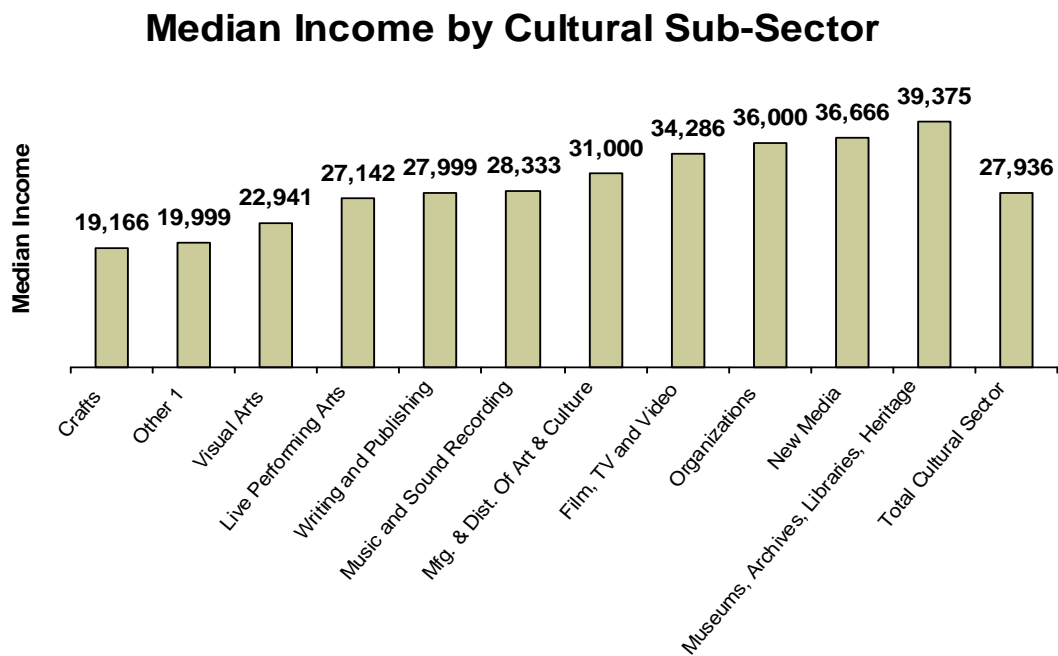
Analysis of the years of experience indicates that there are few new entrants into the crafts, live performing arts, music and sound recording and writing and publishing fields in PEI. Furthermore, of respondents the majority (37.8%) had between 5 and 15 years of experience. This may indicate that a cultural occupation is a second career path for a number of workers in the sector. An analysis of years of experience by gender was also completed and is included in Table 7 below. When compared by gender, the analysis indicates that while historically the gender split was approximately equal, in the last 15 years the industry has shifted towards a more female oriented sector.

	Gender	
	Male	Female
Under 5	29.6%	70.4%
5 to 15	29.1%	70.9%
16 to 25	43.8%	56.2%
26 to 49	50.5%	49.5%
50 and Over	55.6%	44.4%

2.2.5 Income

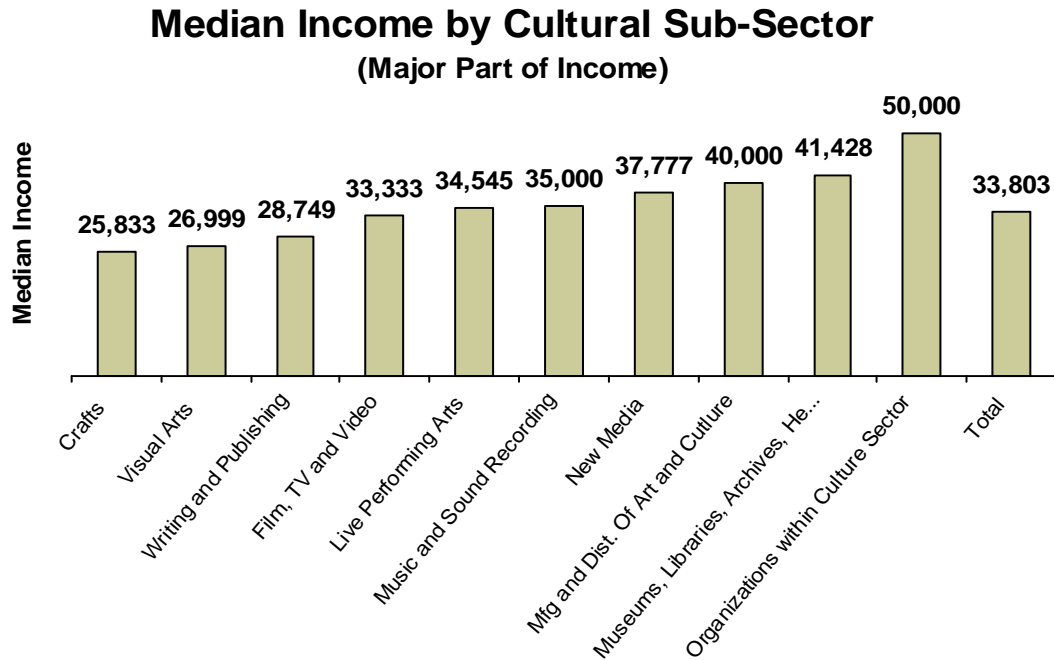
Figure 3 shows the median annual income of cultural workers by sub-sector. The median income of respondents was approximately \$28,000, with Craft sub-sector employees at the lower range of the median and Museums, Archives, Libraries and Heritage workers at the top of the range.

Figure 3



Since about 30% of respondents reported working less than 40 weeks per year or less than 30 hours per week, the analysis of personal incomes was repeated using full-time workers only, resulting in an increase in the median personal income for the culture sector of approximately 17%. Figure 4 shows the revised median incomes for full time workers by sub-sector.

Figure 4



As requested by the PEI CHRSC, the income levels were also broken down by gender and are presented in Table 8. The analysis indicates that female representatives of the culture sector make less than their male counterparts in every income category.

Table 8: Respondents by Part/Full Time by Gender and By Personal Income

Personal Income	Full Time (30 hrs Plus per Wk.)			Part Time (Under 30 hrs per Wk.)			Total
	Male	Female	Sub Total	Male	Female	Sub Total	
Under \$20,000	15.4%	35.6%	26.7%	44.4%	57.9%	54.4%	35.1%
\$20,000 to \$29,999	16.3%	21.2%	19.1%	7.4%	19.7%	16.5%	18.3%
\$30,000 to \$49,999	37.5%	26.5%	31.4%	25.9%	14.5%	17.5%	27.1%
\$50,000 to \$74,999	19.2%	14.4%	16.5%	18.5%	6.6%	9.7%	14.5%
\$75,000 and Over	11.5%	2.3%	6.4%	3.7%	1.3%	1.9%	5.0%

Respondents were also asked to indicate the importance of their cultural work income. The results are included in Table 9. Sixty-four percent of respondents indicated that their cultural income formed a major part of their total income, whereas 26% indicated that it formed only part of their income. As indicated below, only ten percent of respondents considered their cultural work to be more of a hobby than a career.

Table 9: Respondents by Importance of Income from Cultural Work and by Cultural Sub-Sector

Cultural Sub Sectors	Importance of Income from Work		
	Just a Hobby	Just a Hobby but Provides Some of my Income	Major or Sole Part of my Personal Income
Crafts	12.6%	35.6%	51.7%
Film, TV and Video	0.0%	14.8%	85.2%
Live Performing Arts	4.8%	21.4%	73.8%
Museums, Archives, Libraries, Heritage & Festivals	10.2%	15.3%	74.6%
Music and Sound Recording	8.0%	28.0%	64.0%
New Media	0.0%	0.0%	100.0%
Visual Arts	14.1%	28.1%	57.8%
Writing and Publishing	16.7%	42.9%	40.5%
Mfg. and Dist. Of Art & Culture	0.0%	25.0%	75.0%
Organizations within Culture Sector	16.7%	8.3%	75.0%
Grand Total	10.1%	26.0%	63.9%

2.2.6 Unions and Professional Associations

Fifty-two percent of respondents said that they belong to a Union or are affiliated with a professional association while 45% of individuals not affiliated with a union or professional association indicated that they were eligible for membership.

2.2.7 Employment Equity

This survey also sought to gain knowledge of the diversity of cultural workers and develop an employment equity profile for the sector. In the Federal Public Service employment equity groups are:

- Women;
- Persons with a disability;
- Visible minorities, and;
- Aboriginal Persons.

According to survey respondents, in PEI, the employment equity profile of the Cultural Sector includes 9.8% disabled workers, 4.0% visible minority, 1.3% aboriginal and 62.4% women. This is in comparison to Human Resources and Social Development Canada's 2006 Employment Equity Report which reported private sector workers to be 3.0% disabled workers, 0.6% visible minorities, 0.8% aboriginal peoples and 45% women.⁶

2.3 Perception of the sector by workers

The survey design also included some questions that related to the respondents' perception of the Cultural Sector workforce, the future of the sector as a continued career choice and what they saw as the anticipated demand for culture work. When asked about the **demand** for culture work, 74% felt that there was enough work to sustain their businesses and 58.5% felt that the demand for culture work was increasing. See Table 10.

⁶ 2006 *Employment Equity Annual Report* Human Resources and Social Development Canada
http://www.hrsdc.gc.ca/en/lp/lo/lsw/ee_tools/reports/annual/2006/index-we.shtml

Table 10: Q. Do you feel demand for your type of cultural work is growing, shrinking or staying the same?

Cultural Sub-sectors	Growing	Staying the Same	Shrinking
Crafts	61.0%	31.7%	7.3%
Film, TV and Video	56.0%	32.0%	12.0%
Live Performing Arts	55.0%	30.0%	15.0%
Museums, Archives, Libraries, Heritage & Festivals	63.8%	25.9%	10.3%
Music and Sound Recording	56.0%	40.0%	4.0%
New Media	93.3%	6.7%	0.0%
Visual Arts	48.4%	39.1%	12.5%
Writing and Publishing	51.2%	43.9%	4.9%
Mfg. and Dist. Of Art & Culture	53.3%	26.7%	20.0%
Organizations within Culture Sector	75.0%	25.0%	0.0%
Grand Total	58.4%	32.4%	9.3%

The four groups most concerned with the lack of work in their field were respondents from Film, Television and Video, Live Performing Arts, Museums, Archives, Libraries Heritage and Festivals, Music and Sound Recording and Visual Arts. 84% of respondents working for employers felt that there was enough work compared to 70% of self-employed workers. Approximately 60% of workers surveyed were willing to increase their hours of work to meet an increase in demand for their products and services.

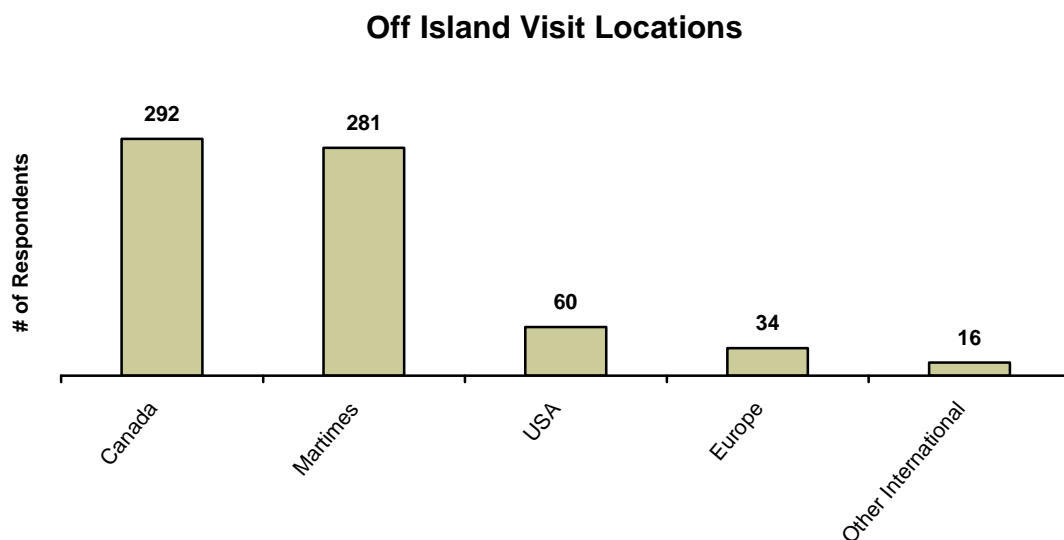
When asked about the likelihood of continuing their cultural work, 97.2% of respondents indicated that they would definitely or likely be continuing their cultural work. Only 2.8% indicated that they were unlikely to continue with their cultural work (Table 11).

Table 11: Respondents by Likelihood of Continuing Their Work by Cultural Sub-Sector

Cultural Sub-sectors	Likelihood of Continuing Work		
	Definitely	Likely	Unlikely or Not
Crafts	78.7%	18.0%	3.3%
Film, TV and Video	60.7%	35.7%	3.6%
Live Performing Arts	75.0%	22.7%	2.3%
Museums, Archives, Libraries, Heritage & Festivals	67.8%	32.2%	0.0%
Music and Sound Recording	81.5%	14.8%	3.7%
New Media	80.0%	13.3%	6.7%
Visual Arts	80.6%	16.4%	3.0%
Writing and Publishing	66.7%	33.3%	0.0%
Mfg. and Dist. Of Art & Culture	68.8%	18.8%	12.5%
Organizations within Culture Sector	41.7%	58.3%	0.0%
Grand Total	73.2%	24.1%	2.8%

To gain a better understanding of the sectors needs, respondents were asked to estimate the frequency of the need to travel off Island to do their work. Fifty-three percent of respondents replied that they went off Island to do their work. The frequency of off Island travel to complete cultural work at various destinations is outlined in Figure 5.

Figure 5



As indicated in Table 12 below, the main reasons that cultural workers travel off Island are to:

- Purchase supplies
- Purchase equipment or use facilities
- Obtain professional services and personnel
- Attend training sessions and workshops

Table 12: Q. What type/types of off island services do you need to employ for your kind of work?

Response	Percent
Supplies	36%
Equipment and Facilities	26%
Professional Services and Personnel	16.8%
Training and Workshops	6.6%
Other	14.5%
Total	100%

Fifty-four percent of respondents reported travelling off Island to do their cultural work either frequently or infrequently (Table 13). In comparing the frequency of off-Island travel to personal income, there is somewhat of a trend in that those going off-Island for work are in higher income brackets than those not going off-Island. The research does not provide an explanation for this correlation.

Table 13: Respondents by Going Off-Island for Work and Personal Income

Personal Income	Go Off-Island for Work		
	Yes-Frequently	Yes-Infrequently	No
Under \$20,000	5.0%	37.2%	57.9%
\$20,000 to \$29,999	11.1%	50.8%	38.1%
\$30,000 to \$49,999	9.8%	42.4%	47.8%
\$50,000 to \$74,999	20.4%	42.9%	36.7%
\$75,000 and Over	47.1%	47.1%	5.9%
Total	11.7%	42.4%	45.9%

3.0 Cultural Sector trends and future developments

To gain a better understanding of the issues faced by cultural workers on PEI and the impact of various local, national and global industry trends on the PEI Cultural Sector, key informants were asked to comment on their perception of their respective sub-sectors in regards to: management, resources, ability to market and promote their products as well as on industry trends which were believed to be impacting their sub-sector in either a positive or negative fashion. From these interviews with the key informants of the various sectors, several common themes emerged, all of which could impact the continued growth of the sector. They are summarized as follows:

- **Incohesive management:** Most interviewees expressed concern over the lack of unity of several groups involved in the management of the Cultural Sector. It was also noted that, although PEI has developed a provincial cultural policy it has not been implemented. There was also concern about an over reliance on volunteers for management and organization.
- **Scarce resources:** Several people interviewed expressed concern over the lack of funding sources available to the various cultural sub-sectors. The link that many programs had to being Employment Insurance (EI) eligible and therefore unavailable to the self-employed worker was also a concern.
- **Culture was not seen as a government priority:** Representatives agreed that culture was not a government priority. It was suggested, however, that the availability of economic impact data would strengthen the sector's ability to negotiate with government for new funding programs.
- **Workforce and employment issues:** The sector believed that the availability of skilled workers was limited due to the lack of an on-Island training facility for cultural workers. Furthermore, a need for entrepreneurial training, technical training and support for the self-employed were deemed warranted and critical by this group.

- **No clear marketing and promotion strategy:** Representatives of this sector wanted to see the development of a unified marketing and promotions strategy that encompassed all of the cultural sub-sectors.
- **Lack of culture education in the school systems:** Representatives agreed that advocacy for culture education in the school systems was warranted to ensure succession of workers into this diverse sector.

The most common and important theme from the interviews of the sub-sector representatives is an expectation of continued growth, in spite of organizational and management constraints.

On a national scale, several major trends were identified through various reports that may impact the growth of the cultural industry in PEI. Those most often cited include: technology advancement, globalization, government finances and changing demographics.

There is a perception that new technologies are having a profound effect on cultural industries, more so than any other sector⁷. On a positive note, the internet is creating new channels for the distribution of cultural products that is both efficient and effective. On the down side, however, the ease of copying and distribution of visual and written works through the internet is resulting in many cases of copyright infringement that are proving difficult to monitor and enforce.

Many interviewees sensed that globalization was (or would) creating great opportunities for the Cultural Sector on PEI. However, they also felt that significant support and training was needed in order to encourage Cultural Sector workers to participate and benefit from the opportunities being presented due to globalblization.

⁷ Zanasi et al. 2004. The Yukon's Cultural Labour Force.

The cultural industries have historically been, and continue to be, heavily reliant on government and patron funding. In the last 10-15 years both federal and provincial government funding for culture has decreased, which is in-line with cutbacks in other programs, while governments have tried to regain control of their deficits. Prince Edward Island, in particular, has felt the effect of these changes. Although per capita government expenditures in PEI are well above average in the areas of multidisciplinary and performing arts, and slightly above average in the area of historic parks, in all other categories, government expenditures are well below national per capita averages⁸. In contrast to this, the government of the Yukon Territory spends more on culture, relative to its population, than any other jurisdiction. The Yukon has also seen pay back on this investment, with a phenomenal growth in its Cultural Sector of 37 % between 1991 and 2001⁹.

The PEI Cultural Sector is an aging group. The median age of cultural workers on PEI is 51.6 compared to the median age of the PEI working population which is 39.9. Furthermore, census data indicates that a vast majority of our younger population are heading west. At present, the aging population of the PEI Cultural Sector and the lack of a succession strategy are of great concern for representatives of the Cultural Sector. In addition to the impact of low numbers of entry into the Cultural Sector, there are demographic changes that are creating more demand for cultural products. For example, the aging baby boomers are seeking out cultural experiences, and cultural tourism, in general, is on the rise. Furthermore, the increase in immigration into Canada and PEI is also creating demand for cultural products.

When asked what were the main drivers of demand in the PEI Cultural Sector, the most often cited responses were technology, public awareness, festival and events and tourism. In comparison to the cultural activity level in other provinces, especially the Yukon, only

⁸ The Iris Group. The Economic Impact of Culture in Prince Edward Island and in the Charlottetown Region. January 2006.

⁹ Ibid 6.

a few existing and future projects identified that were perceived as opportunity for increasing the demand for cultural products in PEI. They are as follows:

- 2009 Canada Games
- Artisan Web Project
- Avonlea Village Projects
 - Avonlea Artist Studio
 - Anne 2008 Celebration
- East Coast Music Awards

There were also some sub-sector specific developments that are worth noting. For example:

- Crafts: Some positive perceptions included opportunities being presented because of cultural tourism and the presence of the PEI Crafts Development Officer position at PEI BDI.
- New Media: The establishment of the new Video Game Art and Design Program at Holland College.
- Music and Sound Recording: The hiring of a full-time Executive Director at Music PEI and the continuing success of the East Coast Music Awards.

4.0 Skills and Training Needs

As mentioned previously, the Cultural Sector is a highly trained workforce. When asked about the highest level of education completed, 73.8% of respondents indicated having post-secondary training. That being said, 66% of respondents still indicated a need for continuing education. A breakdown of respondents by Need for Training by sub-sector is included below.

Table 14: Respondents by Need for Specific Training and by Sub-Sector

Cultural Sub-sectors	Need Specific Training	
	Yes	No
Crafts	51.8%	48.2%
Film, TV and Video	65.4%	34.6%
Live Performing Arts	61.9%	38.1%
Museums, Archives, Libraries, Heritage & Festivals	85.7%	14.3%
Music and Sound Recording	50.0%	50.0%
New Media	92.9%	7.1%
Visual Arts	73.0%	27.0%
Writing and Publishing	66.7%	33.3%
Mfg. and Dist. Of Art & Culture	56.3%	43.8%
Organizations within Culture Sector	60.0%	40.0%
Total	65.9%	34.1%

Of those responding ‘Yes’ to the need for continuing education and training, 64% were self- employed workers.

To gain a better understanding of the training needs of these cultural workers, feedback was solicited from focus group participants during these sessions. In addition, a separate training needs assessment survey was distributed at the PEI CHRSC Annual Forum where the survey was included in each participant’s workshop information package. Participants were asked to complete the 7 question survey, both at the beginning and at the end of the day long forum. Of 95 participants, 9 questionnaires were returned (9.5%).

The results of these questionnaires confirmed the findings from the focus groups, indicating the majority of culture workers are seeking technical-based continuing education opportunities as well as assistance with sales and marketing. In regard to training, respondents are also seeking more substantial training sessions than can be offered in a half day. Some workers reported that they would prefer at minimum one day of training for a particular session, but just as many reported a preference for training of one week duration. When asked about preferred format for training, classroom based and mentorship type training were the most commonly cited responses. There were zero responses with respect to web-based or CD-ROM based training. Three major PEI locations were cited as the preferred location for the training; Charlottetown, Summerside and Montague. When asked to provide an indication of their perception of what a fair price would be, \$100-\$200 for a one or two day course was the most commonly cited response. Respondents also indicated that January through June would be the best time to offer sub-sector specific training.

5.0 Employment Forecasting

This section focuses on the Cultural Sector of PEI and the factors that repel or attract human resources (HR) to that sector. In short, we have built a HR demand model to predict the requirement for HR within the sector based on various factors affecting the demand for HR.

5.1 Method of Analysis: Linear Regression

Regression analysis is a very effective quantitative forecasting technique for short, medium, and long range time horizons and can be easily updated and changed. This technique pre-supposes that a linear relationship exists between one or more explanatory variables, which are predicted to affect the dependent variable, which in our instance is the demand for HR. Based on logic similar to trend analysis, regression projects into the future based on the observed past relationships between the dependent variable and the independent variables.

5.1.1 Regression Prediction Model

The regression prediction model that was employed in this analysis is shown as follows:

$$Y = A + B_1X_1 + B_2X_2 + \dots + B_iX_i + \text{error term}$$

Y = the dependent variable (HR demand in the Cultural Sector of P.E.I.)

A = constant (intercept)

B = the slope of the linear relationship between X and Y

X = the independent variables (factors hypothesized to affect the demand for HR)

The predicted values for HR demand (Y) is a function of the values of the independent variables (X) multiplied by the slope factors (B) plus the constant (A) which is the predicted value of Y when X is zero.

5.1.2 The Dependent Variable

Labour demand is measured as the sum of individuals employed in the sector. A measure of the demand for the Cultural Sector labour force is taken from Statistics Canada's Labour Force Historical Review using the annual average number of people employed in the occupational category of Culture, Art, Recreation and Sport. This labour demand measure does not differentiate between public and private sector or between self-employed and employed by others and is based on the assumption that average wages, hours worked and underlying productivity growth are similar in both groups. Preliminary analysis of the labour demand series from 1987 to 2007 is displayed in Figure 7. Over this time period, the size of the labour force in the sector varied from a low of 900 to a high of 1700¹⁰.

¹⁰ Canada. Statistics Canada. Labour Market Historical Review. Catalogue #: 71F0004XCB. February 19, 2008.

Figure 6



5.1.3 Explanatory Variables

Based on the opinions expressed by key informants and cultural workers as well as findings of the literature review, a number of tourism related variables were investigated as they were believed to affect the demand for labour in the Cultural Sector. They are listed as follows:

- Tourist Parties: The number of tourist parties visiting P.E.I. per year as counted by the Provincial Government agency.
- Gross Domestic Product (GDP): The Gross Domestic Product for the Province.

- Total Expenditures in the Tourist Sector: This is the total of expenditures in the categories of accommodations, food and beverage, and gift shops.
- Specific Expenditures on Accommodations.
- Specific Expenditures on Food and Beverage.
- Gift Shop Revenue.

A number of standard economic indicators were also examined, as follows:

- Gasoline Prices: Based on the OPEC cost of oil per barrel. It was decided to exclude this variable from the analysis at this time due to the current severe fluctuations in oil prices, and;
- Currency Exchange Rate.

The affect of the opening of the Confederation Bridge in 1997 and the hosting of the Canada Winter Games in 1991 were also examined.

5.2 The Results

A forward step-wise regression, in which the choice of predictive variables is carried out by an automatic procedure, was run using StatistiXL (an add-on of Microsoft Excel) and included the above listed explanatory variables. The procedure of forward selection involves starting with no variables in the model, then testing out the variables one by one and including them if they are 'statistically significant'. Upon completion of the analysis, the only variable that the regression model carried in the end was the expenditures on accommodations. The remaining variables failed the test of significance and were excluded. For a further description of the variables tested in the Demand Model see Appendix F.

The resulting equation of the line showing the calculated relationships between the explanatory variables and the dependent variable HR demand, is shown as follows:

$$\text{HR Demand} = 642.265 + 0.013(\text{Expenditures on Accommodations})$$

(Standard Error 0.002)

Statistics for the model are:

R-squared	0.776
Adjusted R-squared	0.754
S.E. of Estimate	98.038
F-statistic	34.652
Probability of F-statistic	>0.001
Durban-Watson Statistic	2.45 (p<.05)

According to the adjusted R-squared statistic, this model explains 75.4 percent of the HR demand in the Cultural Sector. The Durban-Watson Statistic shows an absence of autocorrelation.

The model may be interpreted as saying, for a 1 unit (1 thousand dollars) increase in the expenditures on accommodations, the demand for HR in the Cultural Sector will increase by 0.013 persons (given that other factors remain constant). This is equal to a demand for 1.3 cultural workers for every \$100,000 spent in tourism accommodations.

Using the following estimates of the explanatory variable, for the year 2007:

$$\text{Expenditures on Accommodations} = \$81,385 \text{ (Thousands)}$$

This model predicts that the demand for HR in the sector for this year will be:

$$\text{HR Demand} = \text{Constant} + B1X1$$

$$\text{HR Demand} = 642.265 + 0.013 * 81,395$$

$$\text{HR Demand} = 1700.4 \text{ persons.}$$

Based on current census data indicating the presence of 1670 cultural workers on PEI, this represents a shortfall of approximately 30.4 workers.

Linear forecasting models can be developed at many levels of sophistication and can take into account a vast number of other variables not included in the above analysis. The fact that the analysis revealed a linear relationship between the Cultural Labour force and expenditures on tourism accommodations indicates that the demand for cultural workers or cultural products has increased steadily in a predictable fashion in line with the growth of the tourism industry. It also provides a simple tool that will allow the PEI CHRSC to predict the demand for cultural workers and products in the future. The finding also validates the opinion of a vast number of Cultural workers in PEI and other jurisdictions that culture and tourism are intrinsically linked.

Significance of the reported shortfall of cultural workers at this point is debatable. It is the opinion of many cultural workers that there is no lack of creative talent in PEI but that there is, with the exception of New Media, a lack of opportunity for gainful employment in the Cultural Sector. Although it could be argued that the need to support existing cultural workers and improve their quality of life should be more of a priority at this time, the worker survey also revealed a decline in the number of new entrants into the Cultural Sector, a shift upward in the age that people are entering into the field and a significant shift in the gender make-up of the workforce; all of which need to be addressed if the cultural industry is to continue to grow and prosper.

6.0 Best Practices

Although several studies and documents were reviewed, there are three studies on the Cultural Sector that are notably relevant to this supply/demand study and the recommendations to follow.

- 1) ***Face of the Future: A Study of Human Resource Issues in Canada's Cultural Sector (December 2002)***. Face of the Future is an excellent, comprehensive study conducted by Mercadex International Inc. for The Cultural Human Resource Council and because of its in-depth analysis, this report serves as a base for other reports.

The report lists 7 recommendations, and while national in scope, has five suggested areas which could also be relevant to PEI.

- a. Assist cultural workers in the management of their careers.
- b. Promote an attitude of life-long learning.
- c. Equip cultural workers to capitalize on technological changes.
- d. Support the needs of self-employed cultural workers.
- e. Support recruitment, development and retention.

- 2) ***Building on Success: A Human Resources Development Strategy for the Cultural Sector - 2004***. Building on Success, prepared by Cheney Research Inc., takes the findings from Face of the Future and adds census data, statistical evidence and other studies to develop a Human Resource Development Strategy for the Cultural Sector at a national level. The key issues addressed [cross-sectoral] are:
 - Management skills development.
 - Support for career self-employment.

- Access to effective career-long learning.

Although Supply/Demand and Income Levels were noted as issues, they were not addressed in any detail in the report.

3) *The Yukon's Cultural Labour Force – 2004*. This study was prepared by Luigi Zanasi in association with Research Northwest and Leaf Solutions Ltd. The study relies heavily on the Face of the Future Mercadex study and 2001 Census data.

The Cultural Sector in the Yukon appears to be quite similar to that of PEI in that it is:

- 4.2% of the workforce
- there is a high level of self-employment in the sector
- they earn 75% of the average worker's income
- 55% are women
- there is a lack of management and marketing/promotion expertise.

The study noted the difficulty in defining and/or identifying the cultural population. And relied heavily on the 2000 Census data to profile the industry. Skills deficiencies and training needs were identified through interviews, and are reported by sub-sector.

The recommendations in the Yukon Cultural Labour Force report include several general, cross-sectoral action steps, as well as some sector-specific ideas. The general recommendations which might be applicable to PEI include:

1. Develop means to ensure that self-employed workers have affordable access to basic Business and Self-Employment skills.
2. Promote Training and Workshops that lead to a better understanding of the possibilities of new technologies.

3. Provide training in Marketing and Product Promotion.

The common action steps flowing from the above-noted studies are reflected best in the recommendations from the “Building Success” report:

1. Strengthen the management capacity in the sector. The economic strength of cultural industries relies on the quality of its management (which impacts on HR practices), so the sector needs:
 - a. access to management development opportunities; and
 - b. recruitment and retention of quality managers.
2. Support for career self-employment:
 - a. access to skills development, especially business or personal, necessary to succeed in self-employment; and
 - b. mechanisms to offer a more effective social safety net for the self-employed all across the sector.
3. Access to relevant, needed career-long learning:
 - a. acceptance of the idea that learning/ training is an investment;
 - b. broaden skills beyond cultural-specific skills; and
 - c. upgrading and expanding cultural-specific skills (e.g. adopting new technologies)

The above listed ideas and themes were also reflected in the results of our key informant interviews, and formed a critical part of the focus group discussion.

7.0 Summary and Recommendations

From the review of the literature and cultural labour force studies completed in other jurisdictions, it is clear that many of the issues and challenges of the PEI Cultural Sector are not unique to PEI. Many of the findings and recommendations presented in our review of best practices also hold merit as possible solutions for PEI. During the focus group sessions held with cultural workers, a concentrated effort was made to have respondents express their needs and provide suggestions as to how the PEI CHRSC could assist in supporting workforce related needs of the sector. The recommendations presented in this report are based on key findings from the worker survey as well as the needs expressed by key informants, focus group participants and our review of the literature. Although not all recommendations will be the responsibility of, or necessarily implemented by, the PEI CHRSC, each of the recommendations needs to be addressed if PEI is to sustain and grow its cultural industries.

Key Finding #1: ***There is a strong and pressing demand for training and skills upgrading in the Cultural Sector workforce.*** 70% of the cultural workforce on PEI consists of self-employed small business owners. It is therefore not surprising that many issues and challenges identified during this study are those associated with being self-employed. For example, many cultural workers perceived stagnation in the growth of their businesses but were unsure as to how to move forward, indicating a need for support in developing business management, marketing and promotion skills. Furthermore, cultural workers at focus groups identified a need for continuing education that would address the specific needs of entrepreneurs and career management. These findings are similar to what was reported in “Building on Success” in which the demand for several new competencies were identified including training with respect to career management, new technology, export marketing and personal competencies. In our study specific requests with respect to training included:

- Business management training.
- Training in how to export product internationally.
- Training that would provide assistance in how to properly price and export cultural products.
- Continuing education on the impact of technology on the Cultural Sector.

“Building on Success” presents 4 specific challenges noted in relation to skills upgrading and training opportunities as follows:

- Training not being available;
- Not being appropriate to the sector;
- Not being delivered in a way in which they can be used, and
- Being too costly in terms of time and money.

In our study there was strong consensus that, due to the highly diverse and unique needs of workers at the **sub-sector** level, any training opportunities presented to the Cultural Sector would have to be delivered at the sub-sector level to be beneficial.

Recommendations with respect to training and skills development are that:

1. Specific programs and supports for self-employed cultural workers be developed and promoted.
2. The PEI CHRSC respond to member’s requests for training by developing sub-sector specific training modules to be delivered by the appropriate public and private training organizations.
3. The PEI CHRSC create and promote on the job training opportunities for young people.
4. The PEI CHRSC create and promote opportunities for cultural workers to transfer and share knowledge through the development of mentoring and apprenticeship programs and the hosting of networking sessions.

Key Finding # 2: ***The PEI Cultural Sector will be faced with unique challenges with respect to recruitment and retention.*** There are four demographic findings that demonstrate a critical need for succession planning as well as the need for focused and unique recruitment and retention strategies for the PEI Cultural Sector.

- 1) ***The cultural workforce on PEI is an aging group.*** The median age of the cultural workforce on PEI is 51.6 as compared with 39.9 for the PEI working population.
- 2) ***There are a limited number of young entrants into the Cultural Sector on PEI.*** Further analysis of the age distribution of culture workers revealed that only 2% of workers age 16-24 are entering into the Cultural Sector compared to 19% entering the PEI workforce as a whole.
- 3) ***There is a shifting trend towards the overrepresentation of females in the PEI cultural workforce.*** Analysis of the years of experience and gender data indicates that historical and approximate equal representation of males and females in the sector has shifted over the last 15 years so that now there is a 70% representation of women.
- 4) ***Consultation and survey results indicate culture as a second career.*** Whereas the majority of survey respondents fell into the 45-64 age group (63.2%), the majority of these people had only 5-15 years experience. Similar to what is reported in “Building on Success” it appears that, on PEI, many people seem to be drawn to culture based occupations as they age.

The effect of the retirement of baby-boomers coupled with the decline in the number of youth entering the sector will undoubtedly create shortfalls within the Cultural Sector over the next several years. In PEI it appears that the average age of entry into the Cultural Sector is approximately 40 years of age and that the sector is more attractive to

women than men. This will create unique challenges with respect to recruitment, retention and succession.

Recommendations:

1. Develop a strategy for succession planning that includes advocating educational experience in areas related to the cultural industries in the elementary and secondary school system (up to grade 12).
2. Take the initiative to participate in the development of programs that support people looking for further education related to the cultural industries after high school.
3. Participate as a Sector Council in Career Days at Island high schools and post secondary institutions.
4. Research the opportunity for and encourage hybrid careers within the sector. For example, promotion of opportunities for visual artists in the new media sector.
5. Work with those in the sector who employ people and who associate, for purposes of their work, with self employed people in an attempt to establish meaningful job entry experiences or internship opportunities (i.e. cooperate with the university in creating co-op placements for business, computer science, music, writing, public administration, history, fine arts, and classics students who may have an interest in future involvement in heritage, new media, writing, theatre, or visual arts careers).

Key Finding # 3: ***There is an explicit and undeniable link between the tourism and cultural industries on PEI.*** Several jurisdictions in Canada and the US (including Nova Scotia, Manitoba and Newfoundland and Labrador) have combined provincial tourism and culture resources. Furthermore, statistical modelling developed as a part of this study indicates a significant correlation between the demand for Cultural Workers on PEI and the Tourism indicator of “Spending on Accommodations”.

Tourism related research on P.E.I. has long recognized that product development, especially given the relative brevity of the tourism season in the Province, is a significant challenge. What the cultural industries bring to Prince Edward Island Tourism is diverse and attractive product in theatre, heritage, visual and performing arts, and so on. The key to its success as “tourism product” is that it be, first and foremost, authentic art and heritage – that is the true value that it brings to Tourism. The exposure which Tourism brings to the cultural industries is the payback. This is a potential win-win situation. For example, we often hear of the required investment in the museum and heritage resources of the Province – a potential outcome from the Provincial Museum Strategy which is currently being developed. A significant reason for all levels of government to support this kind of investment is that it will enhance the presentation of Island history, adding to our identity and to our educational resources, and therefore to our “tourism product”. The important side benefit is that it has the potential to create entry level jobs across the spectrum of the cultural industries, adding both to the strength of the Tourism industry and also to the important contribution which cultural industries make to the economy of the Province.

Recommendations:

- 1) Propose a Memorandum of Understanding between the Canadian Tourism Commission, Tourism P.E.I., ACOA, Provincial Tourism, the Tourism Industry Association of P.E.I. and the Sector Council for the purpose of publicizing the opportunities in Tourism product development through the Island’s growing cultural industries.
- 2) Identify opportunities for sharing resources and expertise between tourism and culture in preparation for the increasing demands of the cultural tourist for experiential tourism attractions.
- 3) Explore the Best Practices of other jurisdictions with respect to the sharing of resources and expertise between tourism and culture.

- 4) Host facilitated sessions with Tourism operators to gain a shared understanding of their needs and the potential offerings of cultural industries on PEI, and to create pilot projects that would form the foundation of new training and employment producing activities for participants and new entrants to any one of the cultural industries sub-sectors.

Key Finding # 4: *There is a need for unified leadership and management in the sector.*

From the survey and interviews with sector representatives, one of the biggest weaknesses identified was the lack of leadership for the sector. The list below represents several of the requests or recommendations presented by the participants that demonstrate a need for enhanced leadership, management, and communication within the sub-sectors of the Cultural industry.

- 1) Explore the feasibility of the establishment of a cultural alliance or industry association to act as a unified voice for the Cultural Sector.
- 2) Examine the value of the establishment of a cultural advisory board for government.
- 3) Advocate for the use of Island cultural resources first.
- 4) Develop and distribute a resource guide that profiles support programs available.
- 5) Develop a central registry of culture workers in the province.
- 6) Monitor to ensure that government support programs are meeting the needs of the sector participants.
- 7) Ensure that new educational programs in the province meet the standards of the industry.
- 8) Provide an opportunity to celebrate Cultural Sector role models.

At present the Prince Edward Island Council of the Arts is the closest thing to an association for the Cultural Sector. The Council functions as a granting agency, but also distributes a newsletter with sub-sector specific content and provides a directory/central

registry for local artists. The Council also manages an award program that recognizes the achievements of artists on Prince Edward Island. The PEI Council of the Arts and the PEI CHRSC have distinct and separate mandates with respect to their roles in the culture sector. However this does not negate the fact that there are potential synergies to be realized between the two groups. A close association with the sector council and the sector association is precedent in Manitoba where the sector council for culture falls within the Arts and Cultural Industries Association of Manitoba Inc. (ACI).

Recommendation:

- 9) The PEI Cultural Human Resources Sector Council and the PEI Council of the Arts should explore ways to work more closely together.

Key Finding # 5: *Culture is a major contributor to the PEI economy*: Culture and the activities associated with it on Prince Edward Island, provide employment for 1,670 citizens (Statistics Canada – 2006 Census) and contribute significantly to the gross domestic product on P.E.I. In the 33rd Annual Statistical Review published by the Provincial Treasury of the Province of Prince Edward Island, the Provincial GDP is broken out by a number of industrial categories. In the listing of categories which supply services as a component of the GDP, two categories relate to cultural industries. These are noted in the following table:

	Contribution to GDP	% of Total GDP
Information and Cultural Industries	\$ 130,800,000	4.1%
Arts, Entertainment and Recreation	\$ 31,200,000	.9%
Total	\$ 162,000,000	5%

While these numbers are not exclusive to the cultural industries, they do suggest the magnitude of the sector’s contribution to the Provincial economy. In addition the close association of the sector with Tourism and Education suggests an even greater contribution of the services producing industries.

These numbers are important indicators. They would be more clearly delineated if the cultural industries that are supported by the Cultural Human Resources Sector Council were accounted for separately as a part of the calculation of the Provincial GDP. This would provide a clear benchmark against which the continuing contribution of the cultural industries to the economy could be measured.

Recommendation:

- 1) That the Cultural Human Resources Sector Council request the Provincial Treasurer change the industrial classifications used in the calculation of GDP so that the Cultural Industries are accounted for separately.

Key Finding # 6: ***There is a requirement for enhanced support by government for the Cultural Sector:*** As an industrial sector it is important to understand the Cultural Sector as an economic resource. Its strength as a resource, suggested by the above numbers from the Provincial Annual Statistical Review, is dependent on the quality of the product it produces and the ability of the people who work within it. Given this, it is important that the Province accept as a priority an enhanced focus on the commitments made in the Provincial Cultural Strategy released in 2006. In the consultations there were many representations suggesting that much more could be accomplished if the Province were to enhance the support of the various commitments made in that strategy.

Recommendation:

- 1) That the Board of the Cultural Human Resources Sector Council request the Minister of Communities, Cultural Affairs and Labour seek the concurrence of government in significantly enhancing the level of support to the Cultural Sector in accordance with the commitments made in the Province's official policy document.

Appendix A - Culture Categories

1. Written media

Written media creation: includes the activities of establishments primarily engaged in NAICS 71151 Independent Artists, Writers and Performers.

Written media production: includes the activities of establishments primarily engaged in NAICS 51111 Newspaper Publishers, NAICS 51112 Periodical Publishers, NAICS 51113 Book Publishers, NAICS 51119 Other Publishers and NAICS 51611 Internet Publishing and Broadcasting.

Written media manufacturing: includes the activities of establishments primarily engaged in NAICS 323113, Commercial Screen Printing, NAICS 323114, Quick Printing, NAICS 323115, Digital Printing, NAICS 323119, Other Printing, and NAICS 32312, Support Activities for Printing.

Written media distribution: includes the activities of establishments primarily engaged in NAICS 41442, Book, Periodical and Newspaper Wholesalers-Distributors and NAICS 45121, Book Stores and News Dealers.

Occupations

F021 Writers, F022 Editors, F023 Journalists, F025 Translators.

2. Film and video

Film and video creation: includes the activities of establishments primarily engaged in NAICS 71151, Independent Artists, Writers and Performers.

Film and video production: includes the activities of establishments primarily engaged in NAICS 51211 Motion Picture and Video Production.

Film and video manufacturing: includes the activities of establishments primarily engaged in NAICS 33461, Manufacturing and Reproducing Magnetic and Optical Media, and NAICS 51219, Post-production and Other Motion Picture and Video Industries.

Film and video distribution: the activities of establishments primarily engaged in NAICS 41445 Video Cassette Wholesalers, 45122 Pre-Recorded Tape, Compact Disc and Record Stores, 51212 Motion Picture and Video Distribution, NAICS 51213 Motion Picture and Video Exhibition and NAICS 53223 Video Tape and Disc Rental.

Occupations

F021 Writers, F022 Editors, F023 Journalists, F025 Translators, F031 Producers, directors, F035 Actors, F123 Film and Video Camera operators, F125 Audio and Video Recording Technicians, F126 Other Technical Occupations, and F127 Support and Assisting Occupations in Motion Pictures.

3. Broadcasting

Broadcasting creation: includes the activities of establishments primarily engaged in NAICS 71151 Independent Artists, Writers and Performers.

Broadcasting production: includes the activities of establishments primarily engaged in NAICS 51511 Radio Broadcasting, NAICS 51512 Television Broadcasting and NAICS 5152 Pay and Specialty Television.

Broadcasting distribution: includes the activities of establishments primarily engaged in NAICS 51511 Radio Broadcasting, NAICS 51512 Television Broadcasting, and NAICS 5175 Cable and Other Program Distribution.

Occupations

F021 Writers, F022 Editors, F023 Journalists, F025 Translators, F031 Producers, Directors, F035 Actors, F123 Film and Video Camera operators, F125 Audio and Video Recording Technicians, F126 Other Technical Occupations, and F127 Support and Assisting Occupations in Motion Pictures.

4. Sound recording and music publishing

Sound recording and music publishing creation: includes the activities of establishments primarily engaged in NAICS 71151 Independent Artists, Writers and Performers and NAICS 71113, and NAICS 71113 Musical Groups and Artists.

Sound recording and music publishing production: includes the activities of establishments primarily engaged in NAICS 51221 Record Production and NAICS 51222 Integrated Record Production and Distribution, NAICS 51224 Sound Recording Studios, and NAICS 7113 Promoters of Presenting Arts, Sports and Similar Events.

Sound recording and music publishing manufacturing: includes the activities of establishments primarily engaged in NAICS 33461 Manufacturing and Reproducing Magnetic and Optical Media.

Sound recording and music publishing distribution: includes the activities of establishments primarily engaged in NAICS 41444 Sound Recording Wholesalers, and NAICS 45122 Pre-recorded tape, Compact disc and Record Stores.

Occupations

F021 Writers, F022 Editors, F023 Journalists, F025 Translators, F032 Conductors, Composers and Arrangers, and F033 Musicians and Singers.

5. Performing arts

Performing arts creation: includes the activities of establishments primarily engaged in NAICS 71151 Independent Artists, Writers and Performers and NAICS 71113

Performing arts production: includes the activities of establishments primarily engaged in NAICS 71111 Theatre Companies and Dinner Theatres, NAICS 71112 Dance Companies, NAICS 71119 Other Performing Arts Companies, and NAICS 711311 Live Theatres and Other Performing Arts Presenters with Facilities.

Performing arts manufacturing: Not applicable.

Performing arts distribution: includes the activities of establishments primarily engaged in NAICS 711321 Performing Arts Promoters without Facilities.

Occupations

F021 Writers, F022 Editors, F023 Journalists, F025 Translators, F034 Dancers and F035 Actors.

6. Visual arts

Visual arts creation: includes the activities of establishments primarily engaged in NAICS 71151 Independent Artists, Writers and Performers.

Visual arts production: includes the activities of establishments primarily engaged in NAICS 32711 Pottery, Ceramics and Plumbing Fixture Manufacturing.

Visual arts manufacturing: includes the activities of establishments primarily engaged in NAICS 323113 Commercial Screen Printing.

Visual arts distribution: includes the activities of establishments primarily engaged in NAICS 45392 Art Dealers.

Occupations

F021 Writers, F022 Editors, F023 Journalists, F025 Translators, F034, Dancers, F035, Actors, F036 Painters, Sculptors and Other Visual Artists, A211 Art Dealers and Antique Dealers.

7. Architecture

Architecture creation: includes the activities of establishments primarily engaged in NAICS 54131 Architectural Services and NAICS 54132 Landscape Architectural Services

Occupations

C051 Architects, C052 Landscape Architects, C151 Architectural Technologists and Technicians.

8. Photography

Photography creation: includes the activities of establishments primarily engaged in NAICS 54192 Photographic Services.

Photography production: includes the activities of establishments primarily engaged in NAICS 812921 Photo Finishing Laboratories.

Photography distribution: includes the activities of establishments primarily engaged in NAICS 45392 Art Dealers.

Occupations

F121 Photographers.

A211 Art Dealers and Antique Dealers.

9. Design

Design creation: includes the activities of establishments primarily engaged in NAICS 54141 Interior Design Services, NAICS 54142 Industrial Design Services, NAICS 54143 Graphic Design Services, and NAICS 54149 Other Specialized Design Services.

10. Advertising

Advertising creation: includes the activities of establishments primarily engaged in NAICS 54143 Graphics Design Services and NAICS 541899 All Other Services Related to Advertising.

Advertising production: includes the activities of establishments primarily engaged in NAICS 54181 Advertising Agencies, NAICS 54185 Display Advertising, NAICS 54186 Direct Mail Advertising and NAICS 541891 Specialized Advertising Distribution.

Advertising distribution: includes the activities of establishments primarily engaged in NAICS 54183 Media Buying Agencies, NAICS 54184 Media Representatives, NAICS 54187 Advertising Material Distribution Services, and NAICS 541899 All Other Services Related to Advertising.

11. Festivals

Festivals creation: includes the activities of establishments primarily engaged in NAICS 7111 Performing Arts Companies.

12. Heritage

Heritage production: includes the activities of establishments primarily engaged in NAICS 71211 Museums, NAICS 71212 Heritage and Historic Sites, NAICS 71213 Zoos and Botanical Gardens, and NAICS 71219 Other Heritage Institutions.

13. Libraries

Libraries creation: includes the activities of establishments primarily engaged in NAICS 51911 News Syndicates.

Libraries production: includes the activities of establishments primarily engaged in NAICS 519121 Libraries and NAICS 519122 Archives.

14. Support Services

Support services includes the activities of establishments primarily engaged in NAICS 71141 Agents and Managers for Artists, Athletes, Entertainers and Other Public Figures, NAICS 81321 Grant Making and Giving Services, NAICS 81331 Social Advocacy

Organizations, and NAICS 8139 Business, Professional, Labour and Other Membership Organizations.

Appendix B - Set of Culture Occupations by NOC-2006 and NOC-S 2006

NOC	NOC-S	Occupational Title
A/V AND LIVE PERFORMING ARTS		
5135	F035	Actors
5231	F131	Announcers and other broadcasters
5224	F124	Broadcast technicians
5134	F034	Dancers
5222	F122	Film and video camera operators
0512	A342	Managers in publishing, motion pictures, broadcasting and performing arts
5232	F132	Other performers
5226	F126	Other technical occupations in motion pictures, broadcasting and the performing arts
5131	F031	Producers, directors, choreographers and related occupations
5227	F127	Support and assisting occupations in motion pictures, broadcasting and the performing arts
HERITAGE		
5113	F013	Archivists
5112	F012	Conservators and curators
4169	*E038	Historians, Linguists and other professional occupations
5111	F011	Librarians
5211	F111	Library and archive technicians and assistants
1451	B551	Library clerks
0511	A341	Library, archive, museum and art gallery managers
5212	F112	Technical occupations related to museums and galleries
MUSIC AND SOUND RECORDING		
5225	F125	Audio and video recording technicians
5132	F032	Conductors, composers and arrangers
5133	F033	Musicians and singers
VISUAL ARTS AND CRAFTS		
2151	C051	Architects
2251	C151	Architectural technologists and technicians
5244	F144	Artisans and craftsperson
9472	J182	Camera, plate making and other pre-press occupations
5223	F123	Graphic arts technicians
5241	F141	Graphic designers and illustrating artists
2252	C152	Industrial designers
5242	F142	Interior designers

2152	C052	Landscape architects
5136	F036	Painters, sculptors and other visual artists
5245	F145	Patternmakers, textile, leather and fur products
5221	F121	Photographers
9474	J184	Photographic and film processors
0621	*A211	Retail Trade Manager – Art Dealer, Antique Dealer
WRITING AND PUBLISHING		
9473	J183	Binding and finishing machine operators
1452	B552	Correspondence, publication and related clerks
5122	F022	Editors
5123	F023	Journalists
9471	J181	Printing machine operators
7381	H521	Printing press operators
5124	F024	Professional occupations in public relations and communications
7218	H018	Supervisors, printing and related occupations
5125	F025	Translators, terminologists and interpreters
1423	B523	Typesetters and related occupations
5121	F021	Writers

*Occupations added for the purpose of this study.

Appendix C – Interview Questionnaire

Key Informants Interview Questionnaire

Project purpose: The Prince Edward Island Cultural Human Resources Sector Council is currently carrying out a Labour Force Study on PEI cultural workers. The data collection for the generation of a Profile of the Cultural Sector Workforce is already complete and provides a clear picture as to the **supply** of cultural workers in PEI. To gain a better understanding of what drives **demand** in the sector as well as to gain a better understanding of how the sector is managed we are collecting data (via the questions below) from employers and key informants such as yourself.

NB: Not all questions will be applicable to all individuals.

Tombstone Data

1. Name: Representative of what enterprise/agency:
2. Type of agency/enterprise
3. Location(s)
4. Activities/product
5. Do you have any indication as to the size of your representative sub-sector? Are these numbers available from a published source?
6. Type of employment offered.
 - a. How many full time employees?
 - b. How many part time employees?
 - c. Is employment seasonal, variable?

Management

7. How is the sector/sub-sector managed? (Associations)
8. Do you see it as a cohesive unit? Could it be? What would the benefits of this be?
9. What would it take to make it happen?
10. Where does leadership within the sector come from?
11. Are you aware of the PEI Cultural Human Resources Sector Council and its role?

Funding/Resources

12. How reliant are you on government funding? (as an employer)
13. Specifically what types of programs do you rely on?
14. How reliant are you on patron/sponsor funding to support operations?
15. How reliant are you on fundraising to support operations?
16. With respect to Human resources:
 - a. Are there shortages in your sub-sector?
 - b. Are the staff you have properly trained? (creatively, technically, business wise)

Marketing and Promotion

17. Do you think the sector is being effectively promoted and managed?
18. Whose responsibility is this?
19. Who should have this responsibility?
20. Keeping in mind all the different stakeholders (government associations, individual participants). what is their role in marketing and how are they doing?

Evaluation/Performance Measurements

21. Does the sector/sub-sector evaluate its performance? How do we know they are doing a good job?
22. Is there a mechanism for collecting and analyzing data on the sector? For example, does the sector/sub-sector gauge customer satisfaction? Conduct surveys etc.
23. If so is the information collected effectively used to make changes and plan for the future?

24. What kinds of information do you feel the sector council needs in order to plan for the future?

Industry Trends

25. What are some of the overall industry trends or developments **nationally or globally** that could affect the PEI Cultural Sector?

- a. Government social supports (unemployment), government policies, the Internet and new media technologies, globalization and demographic changes and population (aging population), social values and norms (employment expectations)?

26. What trends or developments **provincially** are impacting the PEI Cultural Sector either positively or negatively?

Demand Drivers

27. What are the demand drivers in your sub-sector?

28. What are some of the existing or planned cultural projects within PEI over the next three years?

Work Force and Employment

With respect to workforce and employment factors that may affect the sector over the next 2-3 years?

- a. Do you think the availability of qualified and skilled workers will be an issue?
- b. Values, beliefs and expectations
- c. Wages and salary costs
- d. Others

29. Do you currently go off Island to get workers? Why?

30. Do you expect that this trend will continue?

Skills Gaps

31. In your opinion, what skills sets are missing in the sector? In PEI, in Atlantic Canada?

32. What about value chain issues; Are there gaps in the value chain that interfere with your ability to deliver your product or service? Are the capabilities and resources available?

Closing Questions

33. Can you list what in your opinion are the two greatest opportunities that should be pursued by the sector over the next 2-3 years?

34. What about the two greatest threats? e.g. competition...
 - a. Challenges with respect to funding, finding champions.

Appendix D – Cultural Workers by Occupation Reported

Cultural Workers by Occupation Reported

Cultural Occupation Codes and Titles	Count	Percent
A014 Senior Managers - Arts and culture association	9	2.2
A123 Urban Planning Director	1	.3
A211 Retail Trade Manager - Art Dealer, Antique Dealer	12	3.0
A341 Library, Archive, Museum and Art Gallery Managers	14	3.5
A342 Managers - Publishing, Motion Pictures, Broadcasting and Performing Arts	14	3.5
B413 Supervisors, Library, Correspondence and Related Information Clerks	2	.5
B551 Library Clerks	1	.2
C074 Computer Programmers and Interactive Media Developers	11	2.7
E038 Other Professional Occupations E.g.: Historians, Linguists	9	2.2
F011 Librarians	10	2.5
F012 Conservators and Curators	8	2.0
F013 Archivists	7	1.7
F021 Authors and Writers	31	7.7
F022 Editors	2	.5
F023 Journalists	4	1.0
F024 Professional Occupations in Public Relations and Communications	2	.5
F025 Translators, Terminologists and Interpreters	2	.5
F031 Producers, Directors, Choreographers and Related Occupations	25	6.7
F032 Conductors, Composers and Arrangers	4	1.0
F033 Musicians and Singers	27	6.7
F034 Dancers	2	.5
F035 Actors and Comedians	5	1.2
F036 Painters, Sculptors and Other Visual Artists	51	12.6
F111 Library and Archive Technicians and Assistants	3	.7
F112 Technical Occupations Related to Museums and Art Galleries	6	1.5
F121 Photographers	15	3.7
F122 Film and Video Camera Operators	4	1.0
F123 Graphics Arts Technicians	0	0.0
F124 Broadcast Technicians	1	.3
F125 Audio and Video Recording Technicians	7	1.7
F126 Other Technical and Coordinating Occupations in Motion Pictures, Broadcasting and Performing	6	1.5
F127 Support Occupations in Motion Pictures, Broadcasting and the Performing Arts	11	2.7
F131 Announcers and Other Broadcasters	0	0.0
F132 Other Performers	0	0.0
F141 Graphic Designers and Illustrators	2	.5
F142 Interior Designers	1	.3

F143 Theatre, Fashion, Exhibit and Other Creative Designers	1	.3
F144 Artisans and Crafts Persons	85	21.0
F145 Patternmakers - Textile, Leather and Fur Products	9	2.2
G721 Tour and Travel Guides	0	0.0
No Answer	1	.3
Totals	405	100.0

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Appendix – F

Description of Variables Tested in Demand Model

Variables	N	Minimum	Maximum	Mean	Std. Deviation
Dependent Variable					
Culture, Art, Recreation & Sport Labour Force Annual Average	12	1200	1700	1491.67	197.523
Predictor Variables					
PEI GDP (Millions)	12	2662	4332	3438.08	569.248
Tourist Party Visits to PEI	12	298693	442250	372739.08	48320.306
Spending on Accommodations (Thousands)	12	40399	79088	64483.42	13209.766
Spending on Gift Shops (Thousands)	12	13461	27160	21917.33	4744.684
Spending on Food and Beverages (Thousands)	12	85186	152635	121095.00	20711.210
Total Expenditures (Thousands)	12	139046	251780	207495.75	36515.677
Price of Oil per Barrel	12	14.42	66.05	30.9942	15.98070
Exchange Rate Cdn to US	12	.66	.90	.7283	.07043

Appendix G - Literature Reviewed

33rd Annual Statistical Review 2006 Prince Edward Island Provincial Treasury June 2007

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