The Visual Arts in Canada:
A Synthesis and Critical Analysis of Recent Research

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Translation by Donald McGrath

Institut national de la recherche scientifique
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Chaire Fernand-Dumont sur la culture

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In undertaking this research, the Visual Arts Alliance had two objectives. Having established its own research agenda in 2008-09, there was a need to decide which of several research trajectories should receive priority. Secondly, have identified the priorities, a strategy for moving forward was needed. Thus, a concept was formed to develop a "research map" that would index the available research on the visual arts and assess it to see where the gaps lay and devise a strategy to fill them.

We are grateful to Guy Bellavance and his assistants, Michèle Dicaire-Théorêt and Mathieu Blais, for their research, the production of an exhaustive bibliography and a final report that far exceeds expectations in terms of both breadth and insight, clearly identifying where the biggest shortcomings in research on the visual arts lie and also outlining in the conclusions alternative strategies to pursue further research to fill those gaps. We are further grateful to Donald McGrath for his excellent translation from the original French.

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Alliance pour les arts visuels

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INTRODUCTION

Objectives

This paper is intended to provide a critical overview of the state of our understanding of the visual-arts sector in Canada. It focuses primarily on analytical and empirical research into the current socioprofessional realities in this sector: living and working conditions, the factors affecting training and dissemination, funding, marketing and consumption, and the situations for the various categories of stakeholders involved in the sector, be they individuals (artists, critics, dealers, curators, teachers, collectors, art audiences) or groups (museums, galleries, professional associations and other institutions, organizations or companies devoted to the visual arts). This paper will also attempt to identify the most relevant current data on the development of the visual-arts sector and its various components. It will also identify gaps in the data and propose certain measures designed to bridge them. This analysis and critical summary of the relevant literature should provide the members of the Visual Arts Alliance with directions as to the best ways of gathering such strategic information.

Context and Constraints

This report follows in the wake of an initial research plan developed by the members of the Alliance (August 22, 2008),[1] and continues the work of R. Labossière (2002),[2] who addressed specifically the problem of obtaining an overview of the visual arts as a discrete sector. On the one hand, this lack of perspective is inimical to an understanding of the sector (which is nonetheless necessary for the development of policies and programs adapted to its needs); on the other hand, it prevents a clear representation of the sector's true scale. Information on the visual arts is, for the most part, "embedded" in data pertaining to the cultural sector as a whole, or to other sectors like education. A major part of our task has consisted, therefore, in "digging out" this information. Three other constraints also arose: 1) research and information on the visual arts are une-

[1] This plan had three segments: 1) an economic and structural study of the visual arts (2); a study of the development of the visual arts market in Canada; and 3) a study of the working conditions of visual artists, cultural workers and volunteers in the sector. See Visual Arts Alliance (August 22, 2008). References are provided at the end of the chapter.

[2] See Labossière et al. (2002).

venly distributed throughout Canada, and the scale of observations relating to this inconsistency vary widely: the differences in perspective among the various levels of government (federal, provincial, municipal) compound other differences stemming from points of view that can be either local, national and/or global; 2) studies of the sector are highly dependent on sponsors' specific missions and on their occasional strategic needs; and 3) the "conceptual" definition of the sector is neither clearly established nor perfectly stable.

The first constraint arises from the difficulty of obtaining relevant data on the sector in Canada, if one disregards the diversity of cultural and institutional situations in its various regional and, more particularly, provincial markets. This stems mainly from the particular status of culture and education in Canada, which are fields of shared, and even contested, competencies: the three levels of government are involved, and the provinces play a central role. The Quebec government, which is very much involved in the arts and culture, has also long claimed exclusive powers over these sectors. Thus the pan-Canadian level is not necessarily the most suitable context for reconstructing an overview of the sector or for precisely defining its structure and main mechanisms. On the contrary, it may well be more realistic and more useful to proceed by regional analyses of such main metropolitan art markets as Montreal, Toronto and Vancouver, and of other markets that remain to be identified. Moreover, the reality of the Canadian, or even Quebec, visual arts scenes is not purely national or local; neither functions independently of international dynamics and both are bound up with them, particularly in this era of globalization. The intelligibility of this national reality depends to a large extent on a precise evaluation of "foreign affairs." The nature of these foreign relations and references moreover vary widely from region to region in Canada: links with France and Europe are much more common in Montreal and in Quebec as a whole, Toronto and southern Ontario are closely bound up with the cultural economies of the large cities of the eastern United States (Chicago, New York, etc.), while maintaining a historic link with London and England, and Vancouver belongs to the Asia-Pacific cultural and economic sphere. These influences impart different shapes to the specific issues and practices of the sector in each region of Canada.

The second constraint also limits the possibility of a strategic research and monitoring program for the sector: the diversity of stakeholders involved is not initially conducive to an overview of the sector. In addition, documentation on the sector's various components is highly uneven. While we do have extensive documentation on artists, museums and public visual arts assistance programs, less is known about all the other strategic operators involved in the sector: dealers, private or corporate collectors, independent critics and curators, and students and professors of visual art, art history and museology. The increasingly numerous and recurrent studies produced on artists in recent decades undoubtedly constitute an indispensable direction for drawing up an initial portrait of the sector. Still, the professional environment in which these studies evolve remains largely unknown due to a paucity of data on other professional visual-arts stakeholders.

The very concept of the visual arts is furthermore continually changing, and presently there is disagreement as to what constitutes the field. The concept is a relatively recent one: its ascendancy over a whole set of other concepts—primarily the previously dominant concept of the "fine arts" and, more recently in francophone circles, that of the *arts plastiques*—dates back to the 1960s; this change took place gradually and without replacing the other concepts.[3] Currently, the concept of the visual arts serves on the one hand as an umbrella term for those "longstanding" art forms that formerly made up the world of the fine arts: painting, sculpture, drawing and printmaking, as well as architecture and many of the crafts. On the other hand, the new concept henceforth includes a set of emerging practices that cannot be adequately circumscribed, either by the old concept of the fine arts or by the more recent notion of the plastic arts: photography, video, computer and digital media, and other, new art forms such as installation, performance and various forms public or community art. Without completely breaking with the former concepts of the practice, the configuration of the visual arts is clearly distinguished from the previous definition encompassing art forms formerly associated with the fine arts or the so-called plastic arts. This situation is evolving, and that evolution creates tension. An inevitable blurring of the boundaries between old craft forms and new media arts coexists with various overlaps and interdisciplinary forays leading, at times, to territorial disputes. In addition, within the fine arts themselves, internal tensions subsist between the field of the classical or traditional fine arts, and a resolutely

[3] In francophone circles, the concept of the visual arts truly took over only in the 1980s, and there are those who sometimes still prefer the concept of *arts plastiques*. Some francophones consider the concept of the visual arts to be a concession to the English sector, another anglicism or a mere ersatz substitute for the concept of *arts plastiques.* On this topic, see my article "*Des Beaux-arts aux arts visuels, le temps des arts plastiques*" (1999), which describes these successive changes in institutional naming in Quebec through the case of the former *École des beaux-arts*, which became a university department of *arts plastiques* in the late 1960s and, after that, a *département d'arts visuels* in the early 1980s (today, *École des arts visuels*).

modern or post-modern contemporary art field. Finally, the visual arts tend to be encompassed or subsumed by the broader field of "visual culture," which contains a hodgepodge of traditional applied arts, more recent audiovisual media and the new "creative design." This conceptual blurring has led some researchers to conceive of the professional world of the visual arts as composed of overlaid sets of "historic" realities. Thus, for the sociologist Raymonde Moulin, the contemporary world of the visual arts appears to be the "legacy of a multisecular history in the course of which the profession's modes of organization and the ways in which it recognizes the artist's identity have succeeded one another without completely cancelling each other out, with the result that discrepancies, incompatibilities and contradictions among the various possible definitions have not ceased to increase" (1983, p. 388).

A Working Definition: The Visual-Arts Sector as Professional Ecosystem

This paper's operational approach is that the conceptual vagueness surrounding the definition of the visual arts does not, however, preclude a working definition of the sector. From this perspective, the reality of the visual arts has less to do with from the grouping of a set of well-established disciplines and trades—although, quantitatively and economically, paintings and works on paper still play a key role, acting as a sort of centre of gravity[4]—and more from a set of common production and presentation "mechanisms" specific to this sector: museums, galleries, artist-run centres, art magazines, collections, bursaries, grants, public commissions, all clearly devoted to the "visual arts." These mechanisms form the common core or nucleus of this sector of professional activity. Their convergence constitutes a sector of professional practices intended to facilitate the production of works of visual art.

[4] The data gathered in 2000 as part of our inquiry into the working conditions of visual artists suggest that this is the case. The number of painters was vastly superior to the number of sculptors and other artists associated with the sector. Moreover, many artists involved in less traditional art forms (photography, new media, performance, etc.) had training and work experience considered prerequisites for painting. See Bellavance et al. (2005). Economically, a number of recent inquiries indicate that the volume of transactions involving paintings and works on paper (photography included) also remains higher. See Routhier (June 2006).

Report Overview

Our report is intended to be a synthesis and a critical analysis of recent documentation on five major professional mechanisms that, in our view, seemed indispensable. Despite local or regional variations, these mechanisms are commonly used throughout Canada and beyond: 1) the school as a mechanism of professional training and education; 2) public arts-funding bodies (grants to individual artists and arts organizations); 3) museums as mechanisms for collecting and exhibiting Canadian works of art; 4) the art market as a mechanism for selling artworks; and 5) professional groups as sectoral associations. Each of these mechanisms can be taken as a structural and functional element of a professional system specific to the visual arts. But each can also be conceived of as the privileged site or environment of a more relational or social professional "ecosystem." An overview of this sector necessarily involves a minimal knowledge of the state of each of these sites and/or mechanisms, depending on the perspective—from above, as a systemic mechanism; or from below, as sites and anchor points for the specific ecology of this professional milieu.

Our report is designed to produce an assessment of the state of knowledge specific to each of these five dimensions of the system or ecosystem of the visual arts in Canada; one chapter is devoted to each dimension. Like works of art, these professional systems have their own respective histories. Each chapter begins with an overview of related major developments in Canada in recent decades. This is followed by an analysis of the state of the most recent data available on this topic; the most relevant documents are identified and commented. Each chapter concludes with an identification of major information gaps and a bibliography of not only the documents referenced but also additional reading worthy of attention. The latter has been culled from a more exhaustive bibliographic corpus listing, among other things, major works produced abroad on each of the questions covered. We indicate which of these documents are accessible, the form(s) in which they are accessible (paper or electronic formats) and how they may be accessed (INRS, restricted access, free access). A conclusion draws together the main observations and makes recommendations.

This critical review of studies and inquiries on the visual-arts sector in Canada is based on an initial compilation and bibliographical classification tabled last spring. This compilation is intended to be as exhaustive as possible, give the time available and the extent of access to documents. Although this report bears mainly on works published within the past decade on the visual-arts sector in Canada, the initial compilation made it possible to bring together Canadian and foreign contributions that go back, at times, to the 1960s and 1970s. While our analysis deals mainly with colourless official data and commissioned reports, international sources were mainly universities. The thematic analysis of this major national and international body of information has made possible an initial understanding of the reference framework. This initial classification analysis, also tabled last spring, is presented in an appendix along with a detailed presentation on our methodological strategy and its various steps.

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CHAPTER 1

SCHOOLING, PROFESSIONAL TRAINING AND EDUCATION

1.1 Chapter Overview

The relationships between the visual arts and education goes back a long time. The contemporary period, for its part, has been marked by the progression of arts instruction through all levels of the school system, from elementary school to postgraduate studies. The development of accredited professional programs dedicated specifically to the visual arts and their extension into higher learning therefore affect all categories of personnel involved in the visual arts, and first and foremost artists themselves. For artists, this represents a major paradigm shift in relation to times when visual-arts instruction took place in specialized schools or crafts schools. Unlike the case of other professions such as medicine, law and engineering, one does not have to earn a diploma or degree in order to practice as an artist; however, art schools are no less important as sites in this professional environment and cannot be discounted as mechanisms for professional development. A master's degree in the visual arts currently constitutes a major step in the certification of artists and is equivalent to the role formerly played by the fine-arts schools or, prior to their existence, by the academies. The development of a certain number of "research/creation" grants intended for artists who have successfully completed postgraduate arts programs, particularly in Quebec, points to a more thorough integration of visual artists into the university research system.

The development of programs in art history and in museology is also worth considering. These no longer have a merely retrospective function but possess a specifically prospective aim that leads the category of professionals they produce to play an increasingly direct and indispensable role in the field of contemporary Canadian art through promotion and organizational activities.

Finally, the question of the training of elementary- and secondary-school visual arts teachers is tied to the question of arts training in general and to the role of Canadian visual art in Canada's school curricula. We should also mention, at this level of the school system, the development in some Canadian provinces since the 1990s of "artists-in-the-schools" programs.

Against this background of the development of formal training, it is harder to work out the current state of the traditional and more informal methods of learning: less documented or less codified, are they in decline or are they standing firm? A number of recently minted professional development opportunities for artists and other art professionals has arisen parallel to the traditional system of regular instruction. These new training options, generally oriented toward career management and what is termed employability, were launched in the mid-1990s, spurred on not so much by the education or cultural sectors but rather by government bodies whose mission was specifically labour-force and human-resources development. Their primary aim has been to develop individuals' managerial and business skills, as opposed to basic artistic or professional competencies.

Thus professional training in the visual arts, and visual-arts education in general, accounts for a large yet relatively misunderstood segment of organization and funding. Not only does the school system play an educational role; it also provides an economic driving force. It has not only facilitated labour force renewal and the development of audiences for art, but has long provided many bread-and butter jobs for artists and other art professionals. The issue of tuition for postsecondary programs of study concerns the whole of the professional milieu, and thereby directly plays into the sector's funding and economy; the same holds for money spent on professional development and continuing education. This educational contingent is rarely attributed to the "public accounts" of national undertakings when it comes to measuring the size of the sector; taking education into account would noticeably increase the socioeconomic significance of the visual arts. Knowledge of these educational mechanisms therefore assumes considerable strategic importance for the development of the domain.

1.2 Available Data

Data on professional training and visual-arts education are particularly hard to gather and define at the pan-Canadian level, due in part to the fact that education falls under provincial jurisdictions. Moreover, most of the basic administrative data on regular programs have been gathered by educational organizations (government education departments, colleges, universities, school boards) rather than by cultural organizations. As a result, the analytical categories rarely correspond. Thus, the category of "studies in the fine arts" or "in art," used in the school system, is only a partial match with that of the "visual arts," which poses a problem that has so far remained insurmountable. As a result, very little precise information exists on regular programs having to do with the visual arts: funding (particularly with regard to tuition fees), annual graduation rates, the professional paths of students (whether or not they graduated), teacher profiles, program structures and content, and the nature of research/creation grants in the university setting.

Statistics Canada has conducted a certain number of studies on graduates in the art and culture, particularly with regard to their position in the labour market. The resulting data incorporate the areas of study but do not detail the specific situation of workers in the visual-arts sector (StatsCan/Luffman 2001 a and b). Two other fairly old studies may contain more precise information (McCaughey 1993[5] and Raymond 1993[6]), but since they concern the fine arts rather than the visual arts, they only partially coincide with the current configuration of the domain. More recently, the *Observatoire de la culture and des communications du Québec* (OCCQ – *Institut de la statistique du Québec*) gathered recurrent data on student populations and degrees awarded in the domain of arts and letters in Quebec universities (OCCQ 2001 – 2006). These data distinguish between students in arts and letters, on the one hand, and art students on the other, but the latter category clearly does not include degree programs in the visual arts[7]; data on students amalgamate the whole range of "arts and letters."

Data on master's degree programs in the visual arts, currently limited despite the strategic importance of those degrees, could serve as a useful indicator of the situation and of changes in the

[5] The study that McCaughey conducted for Statistics Canada was based on a 1988 nation-wide survey and focused on university graduates in the fine and applied arts, rather than on those in the visual arts. The category of fine arts students encompasses general studies in the arts, knowledge of the fine arts, aesthetics, printmaking and sculpture; excluded are students in music and the other performing arts, as well as those in such applied arts as graphic art, drawing, graphic design, etching, lithography, photography, printmaking, ceramics, clothing and jewellery design, and interior design. We should also point out that museology (like creative writing, music education, architecture and arts administration) does not fall under the category of the fine and applied arts.

[6] Based on the Relance survey by Quebec's former *Ministère de l'instruction supérieure et de la science*, this study targeted college students who graduated at the end of the 1989 – 1990 school year and university graduates from 1987. For the same reasons, it remains just as imprecise as the preceding one. It does include, however, the sub-category "plastic arts."

[7] This category included, among other things, music, dance and drama. We learn, for example, that, between 2001 and 2006, the total number of students enrolled in arts programs fluctuated between 8,883 and 9,649 annually; the only cohort of master's degree students rose from 809 to 1,000. It would be interesting to know the relative portions of the curriculum taken up by art making, art history, museology and arts education for each degree level.

field. Such data are lacking. A recent special issue of the magazine *Canadian Art* (Winter 2008) did look at a certain number of such programs across Canada and shed some light on the question. In Canada, we were able to find only one other study, this one ethnographic and qualitative, which dealt specifically with this theme (Sefton 2007).[8]

Many publications have surfaced in recent years on professional development needs in the cultural sector. Related to the efforts of the Cultural Human Resources Council (CHRC) and its provincial equivalents—the Cultural Careers Council (CCC) in Ontario and the *Conseil québécois des ressources humaines en culture* (CQRHC) in Quebec—these publications focus on the development of labour-force skills. For example, a recent publication by the CHRC, *The Art of Managing Your Career*, is a resource guide designed to "provide emerging self-employed artists and cultural workers with pertinent and practical information to better manage their careers," and includes a "Discipline Enhancement" section for workers in the visual-arts sector (CHRC 2007). This guide was updated in 2009 to include new and original examples, links to various useful websites, and instruction in the areas of finances and technology (CHRC 2009). It also includes examples and procedures specific to the provinces that complement the information already contained in the original version. The CHRC has also developed a teacher's guide and course modules (available only in English). The teacher's guide is intended for use by emerging artists and cultural workers, while the course content is designed for teachers at the college and university levels, as well as for professional associations. At the provincial level, we should mention an even more recent publication, this one in Saskatchewan, of a Best Practices manual intended for the visual arts and the crafts (Saskatchewan 2010). In Quebec, between 1999 and 2002, the CQRHC produced a series of analyses of the competencies required for a set of support and organizational jobs in the sector.[9] We should also mention here our own work on professional training for artists (Bellavance and Laplante 2002 and 1997). The first article provides a broad analysis of this issue in

[8] This was a PhD thesis completed at the University of Toronto: *Master of Fine Arts: The Construction of the Artist in Academe*. The author followed the paths of fewer than 10 students enrolled in one of the master's degree programs. In the same vein, American sociologist Judith Adler's *Artist in the Office* (1979) describes the situation of students and teachers at the famous CalArts School during the 1970s. A more recent article relating to the same school is Sarah Thornton (2008), "The Crit," in *Seven Days in the Art World*, p. 43 – 73. For an analysis of the constraints on recognition experienced by the artist-teachers in university settings, see Fournier et al. (1989). This is a case study featuring a peer evaluation of the university career of an artist-teacher working in Montreal.

[9] Particularly regarding the management, production and visual-arts dissemination skills required for those working in artist-run centres (2002); on the coordination of media arts training; on the position of museum curator (2000), exhibition project coordinators (2000) or of animators/guides and interpretive guides (1999).

twentieth-century Quebec and relates the visual arts to other artistic careers, and the second is a report on a survey conducted on the professional development needs of Quebec artists and performers; it includes, among other things, a chapter on the specific needs of the members of the *Regroupement des artistes en arts visuels* (RAAV).

As interesting as they may be, none of these contributions provides basic data or an overview of the state of professional training programs specific to the domain of the visual arts. There are no recent publications with precise data on either the supply or demand sides of professional-development needs over the past fifteen years or more in the various sectors of professional art practice. If such data exist, they would obviously be held by government departments and bodies entrusted with human-resources development.

Faced with these institutional developments, the current state of training and mentorship programs under the direct responsibility of the arts sector certainly needs to be examined. The role played by artist-run centres and professional centres like the Canadian Artists' Representation/*Front des artistes Canadians* (CARFAC) and like RAAV seems indispensable. In recent years, CARFAC and RAAV have produced, among other things, best-practices guides for artists. Artist-run centres also function as transitional agencies between school and career for artists, and for the other categories of professionals involved (curators, critics, historians and theorists). Professional training in artist-run centres could foster youngest artists' acclimatization to the concrete realities of their profession (portfolio development, grant applications, exhibition organization, and so on) and could also contribute more generally to the mobility of the labour force in the visual arts between its various components (museums, private galleries, associations, arts councils and government departments). Note that, in Quebec, the RCAAQ has had at its disposal for a number of years a catalogue of training programs designed for its employees, which has been adapted for English Canada.

Finally, the existing work on visual-arts education is either very general[10] or applicable to highly specific cases.[11] We do not possess enough information to identify the portion of these devoted to

[10] See recent work on the history of arts education in Canada (Pearse ed. 2006).

[11] See Kind et al. (2007) on the artist/teacher relationship in elementary school.

visual-arts instruction in the different levels of the school system, from elementary school through to the PhD level. It does seem necessary, however, to gauge how much of this material pertains to instruction in Canadian art within the various curricula. For artists, being themselves the “subject” of courses taught in the schools is certainly as useful as studying or teaching in them.

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CHAPTER 2

PUBLIC ASSISTANCE FOR ARTISTIC CREATION

2.1 Chapter Overview

Public arts-funding programs are a major pillar in the contemporary visual-arts world and are a feature of daily life for numerous professionals in this sector. The role of the Canada Council for the Arts (CCA), since its creation in 1957, has been essential. Operating on the peer jury model, it has strived mainly to help Canadian artists working in Canada. The Canada Council has also become involved to a significant extent in providing direct assistance to individual artists, and the grants it has allocated far outweigh its grants to institutions and non-profit art institutions. The Canada Council's mandate also includes programs intended for visual art museums and contemporary art galleries whose task is mainly to organize exhibitions of works by Canadian artists. While assistance to visual-art museums (exhibitions and acquisitions) represents a large share of the budget earmarked for the sector (nearly 40% in 2008), assistance to artists is the Canada Council's main raison d'être; the Council also provides support to artists' groups (artist-run centres and professional associations),[12] and has played a key role in the development of artist-run centres. Practically unheard of outside Canada abroad, these centres, which are run by artists themselves, function not only as art production and dissemination centres but also as professional training venues. They exist throughout Canada, and are a tremendous professional-information resource. The Canada Council has also fostered the emergence of magazines and other publications devoted to the promotion of visual art produced in Canada by Canadians. More than in any other field, the body's actions seem very much centred on artists.

Similar public arts-funding programs were gradually established at the provincial level, particularly beginning in the 1970s. Today, some of them may even exceed the level of federal assistance, as has been the case in Quebec since the 1980s. Federal and provincial organizations do not only fund artistic creation and production; their role is also to certify and recognize the status of artists and organizations devoted to the creation of original works of art by Canadian artists. This public mechanism has not only extended and complemented government involvement in

[12] In 2008, direct assistance to artists and artist-run centres accounted for not less than 40% of visual arts funding.

visual-arts education but has defined it: the autonomization and codification of a Canadian visual-arts sector are due largely to the joint effort of these various arts councils. The contemporary evolution of Canadian art history is inseparable from the decisions and choices made by these councils and their peer juries.

More recently, arts funding has also been visible in the development of programs to oversee public art commissions. Although the federal government has had a limited involvement in public art, there have been major developments at the provincial level, particularly in Quebec as of the early 1980s, and at the municipal level (Montreal, Toronto, Ottawa, Calgary, etc.) from the 1990s onwards. These commission programs also operate by competition. However, unlike the arts councils, the juries are generally divided evenly into experts from professional circles and representatives of the public and/or commissioning agencies. As well, funding for these works generally does not come from government cultural bodies but from other types of public (education, transportation, health) or private (real estate corporations, etc.) sources.

2.2 Available Data

Statistics Canada data on public spending on culture (April 2010) provide an initial overview of the relative importance of public funding allocated by the three levels of government (federal, provincial, municipal) in the "visual arts and crafts" sector. The most recent data, for the 2007 – 2008 fiscal year, set the total gross expenditures for the three levels of government at $98.7 million for all of Canada, and underscore the relative importance of provincial assistance (three-quarters of the expenses, or $74.1 million) compared to federal assistance ($24.6 million). The municipal sector was not involved at this level. Apart from the imprecision resulting from the combination of the visual arts with crafts, these estimates remain somewhat conservative, excluding expenses associated with visual-arts instruction (attributed to general "arts education"[13] expenses), art museums (attributed to "heritage resources"), to visual-art magazines and other publications (attributed to "literary arts"), as well as to a range of multidisciplinary visual practices (attributed to the "multidisciplinary and other activities" category). The following table provides a detailed breakdown of expenses in Canada by function and level of government.

[13] In the order of $146.8 million, $124.8 million of which comes from provincial sources.

Table 1:
Government Expenditures on Culture, by Function and Level of Government, 2007 – 2008

	Level of government			**Total gross expenditures**
	Federal	**Provincial/Territorial**	**Municipal[1]**	
	Thousands of dollars			
Libraries	41,336	972,043	1,782,454	2,795,833
Heritage resources	1,017,230	848,307	119,242	1,984,779
Arts education	21,939	124,828	0	146,767
Literary arts	133,579	24,409	0	157,988
Performing arts	240,698	221,485	47,354	509,537
Visual arts and crafts	**24,606**	**74,083**	**0**	**98,689**
Film and video	330,457	116,327	0	446,784
Broadcasting	1,727,738	201,427	0	1,929,165
Sound recording	27,060	5,328	0	32,388
Multiculturalism	19,440	22,858	0	42,298
Multidisciplinary and other activities	152,609	219,705	662,219	1,034,533
Total expenditures	**3,736,693**	**2,830,800**	**2,611,269**	**9,178,762**[2]

1. Municipal spending is on a calendar-year basis.
2. Includes inter-governmental transfers of approximately $443 million.

Source(s): Statistics Canada: Survey of Federal Government Expenditures on Culture, Fiscal Year 2007 – 2008; Survey of Provincial/Territorial Government Expenditures on Culture, Fiscal Year 2007 – 2008; Public Sector Statistics Division, and Tourism and the Centre for Education Statistics Division.

The same set of data also allows the reconstruction the distribution of amounts allocated to the "visual arts and crafts" by province and territory (Table 2). Efforts evidently vary widely from region to region. Quebec and Alberta, which account for nearly two-thirds of expenditures, stand out sharply. On the other hand, the efforts in Ontario seem relatively weak, given the relative weight of that province.

Table 2:
Government Expenditures on Visual Arts and Crafts, by Province or Territory and Level of Government, 2007 – 2008

Provinces and Territories	Federal	Provincial	Total	% of Total Public Assistance
Quebec	6,618	28,215	34,833	35.3
Alberta	1,681	26,570	28,251	28.6
Ontario	8,026	6,199	14,225	14.4
British Columbia	3,979	2,267	6,246	6.3
Saskatchewan	1,008	4,684	5,692	5.8
Newfoundland and Labrador	271	2,923	3,194	3.2
Manitoba	931	1,517	2,448	2.5
Nova Scotia	914	1,076	1,990	2.0
New Brunswick	544	510	1,054	1.1
Prince Edward Island	171	65	236	0.2
Yukon	97	58	155	0.2
Nunavut	43	0	43	-
Northwest Territories	28	0	28	-
Other[1]	296	-	296	0.3
Canada	**24,606**	**74,083**	**98,689**	**100.0**

1. Includes national organizations, foreign countries, and unallocated expenditures not broken down by province or territory.

Sources: Statistics Canada, Government expenditures on culture. Table 8: Federal government total expenditures on culture, by function and province or territory, 2007 – 2008; and Table 13: Provincial and territorial government total expenditures on culture, by function and province or territory, 2007 – 2008. **Special processing by INRS.**

The Canada Council and the *Conseil des arts et des lettres du Québec* (CALQ) are two more major producers of data. The federal body's publications fall mainly into three categories: 1) periodic compilations of the annual funding allocated to visual artists and arts organizations, broken down by province and sometimes by metropolitan area (Toronto in 2000, for example[14]); 2) program evaluation reports; 3) reports of consultations with arts-sector professionals.

Although limited to the Canada Council's immediate clientele, the first type of document is clearly of interest. The most recent one we parsed[15] deals with the full range of grants programs in all disciplines. It first outlines the share of grants attributed to the visual arts in comparison to other

[14] CCA (2000), http://dsp-psd.pwgsc.gc.ca/Collection/K21-23-2000E.pdf.

[15] CCA (2009), *Canada Council for the Arts: Funding to Artists and Arts Organizations: National Overview 2008 – 2009*,http://www.canadacouncil.ca/NR/rdonlyres/D04FC454-8E23-4AFC-9FF02407B216702C/0/NAENRevised.pdf

sectors (14%); it also traces the development of grant allocations in the sector between 2004 – 2005 and 2008 – 2009—from $17.3 million to a little over $21 million[16]— as well as the distribution of funds in 2008, according to the various programs specifically targeting the visual arts.

Table 3:
Grant Amounts Allocated by Type of Program and by Program, Canada Council for the Arts, Visual Arts, 2008-2009

By Type of Program	$	%	#	By Program	$	%	#
Art museums and public galleries	8,351,500	39.7	107	Assistance to exhibitions	7,848,000	**37.3**	**76**
				Acquisition assistance	503,500	2.4	31
Organizations (operating and project grants):	5,836,905	27.7	214	National service organizations	542,000	2.6	5
				Organizations (projects)	922,100	4.4	100
				Artist-run centres	4,121,500	**19.6**	**78**
				Aboriginal organizations	71,675	0.3	5
				Flying Squad	179,630	0.9	26
Artists	4,326,340	20.6	226	Projects	2,755,640	**13.1**	**161**
				Long term	1,200,000	5.7	30
				Artists & communities	215,600	1.0	19
				Aboriginal artists	132,600	0.6	8
				Visiting foreign artists	22,500	0.1	8
Critics and curators	394,500	1.9	16	Independent critics and curators	224,500	1.1	11
				Aboriginal curators (residencies)	65,000	0.3	2
				Multicultural curators (residencies)	105,000	0.5	3
Contemporary art dealers	239,900	1.1	16				16
International	1,066,800	5.1	156	Residencies	255,300	1.2	11
				Travel grants to professionals	216,500	1.0	140
				Major exhibitions	595,000	2.8	5
Crafts (artists and curators)	370,000	1.8	19				19
Architecture	450,000	2.1	21	Architecture (practitioners and critics)	150,000	0.7	10
				Architecture (exhibitions)	300,000	1.4	11
TOTAL	**21,035,945**	**100.0**	**775**		**21,035,945**	**100.0**	**775**

Source: Canada Council for the Arts. **Special processing by INRS.**

[16] Note that, during the same period, the budget for the media arts sector went from $12.3 million to $14.2 million.

An analysis of this budget (Table 3) shows that assistance to museums and public art galleries (exhibitions and acquisitions) accounts for nearly 40%, while support to organizations (including artist-run centres) represents close to 30% (20% of this goes specifically to artist-run centres) and assistance to individual artists a little more than 20%. Other programs also target independent critics and curators (2%) and contemporary art dealers (1%). Added to these amounts are “international” grants attributed to all of these categories combined (5%). A fraction of this budget is also devoted to the crafts (2%) and to architecture (2%). Note also that funds allocated to visual-art magazines should be added to this total since, falling under the literary publishing sector, they are not taken into account here. We can also presume that the organizations (artist-run centres, museums and private galleries) benefit not only from programs specific to the visual arts but also from other programs (Media Arts, Inter-Arts Office, Music, Equity Office), albeit to an extent that remains difficult to estimate.

The same document also shows the grant amounts (Table 4) and the number of grants (Table 5) by region. An analysis of these figures reveals that Ontario received nearly one-third of the funding (32.3%) while Quebec received over one-quarter (27.8%), followed by British Columbia (16.4%), the Prairies (13.7%) and the Atlantic Provinces (8.3%). A tiny sum (0.5%) went to the territories in the Canadian North (the Yukon, the Northwest Territories and Nunavut). Another fraction (1%) involved stakeholders outside of Canada. Our analysis also reveals variations in the types of assistance by region. Thus Ontario’s advantage (particularly over Quebec) is due largely to grants to museums: 34% of these funds went to Ontario museums, as opposed to 20% to museums in Quebec. In fact, Ontario museums accounted for over 40% of the visual arts grants given out in the province (42%). On the other hand, the share of grants to artists was roughly equivalent in the two provinces (respectively 32% and 30% of the total value of these grants). Quebec outnumbered Ontario, however, with regard to the share attributed to artist-run centres (32% to 26 centres in Quebec and 29% to 20 in Ontario). Ontario, Quebec and British Columbia shared 81% of the grants awarded to individual artists, 76% to artist-run centres and 72% to museums.

Table 4:
Grant Amounts Allocated by Type of Request and By Region, Canada Council for the Arts, 2008

	Ontario	Quebec	BC	Prairies	Atlantic provinc-es	Canadian North	Outside Canada	Total Value	%
Museums	2,823,825	1,639,700	1,555,325	1,482,000	811,650	39,000	–	8,351,500	39.7
Assistance to exhibitions	2,628,000	1,555,000	1,442,000	1,398,000	786,000	39,000	–	7 848,000	37.3
Acquisition assistance	195,825	84,700	113,325	84,000	25,650	–	–	503,500	2.4
Organizations	1,818,425	1,896,560	731,500	806,920	553,000	30,500	–	5,836,905	27.7
National service organizations	238,000	243,000	–	–	61,000	–	–	542,000	2.6
Organizations (projects)	328,700	228,900	104,800	94,600	154,600	10,500	–	922,100	4.4
Artist-run centres	1,211,050	1,332,800	580,000	660,850	316,800	20,000	–	4,121,500	19.6
Aboriginal organizations	19,875	18,000	6,000	25,000	2,800	–	–	71,675	0.3
Flying Squad	20,800	73,860	40,700	26,470	17,800	–	–	179,630	0.9
Artists	1,334,240	1,332,600	833,000	342,400	265,800	35,200	183,100	4,326,340	20.6
Projects	922,340	758,000	540,500	219,900	111,800	20,000	183,100	2,755,640	13.1
Long term	320,000	480,000	200,000	80,000	120,000	–	–	1,200,000	5.7
Artists & communities	54,500	71,100	67,500	22,500	–	–	–	215,600	1.0
Aboriginal artists	31,400	12,000	20,000	20,000	34,000	15,200	–	132,600	0.6
Visiting foreign artists	6,000	11,500	5,000	–	–	–	–	22,500	0.1
Critics/curators	62,000	137,500	135,000	60,000	–	–	–	394,500	1.9
Independent critics and curators	27,000	137,500	30,000	30,000	–	–	–	224,500	1.1
Aboriginal curators (residencies)	–	–	35,000	30,000	–	–	–	65,000	0.3
Multicultural curators (residencies)	35,000	–	70,000	–	–	–	–	105,000	0.5
Dealers	134,000	68,400	37,500	–	–	–	–	239,900	1.1
International	452,300	465,500	75,000	37,000	21,000	8,500	7,500	1,066,800	5.1
Residencies	112,300	80,000	42,000	21,000	–	–	–	255,300	1.2
Travel grants to professionals	70,000	60,500	33,000	16,000	21,000	8,500	7,500	216,500	1.0
Major exhibitions	270,000	325,000	–	–	–	–	–	595,000	2.8
Crafts	89,400	115,000	15,400	60,000	80,200	–	10,000	370,000	1.8
Architecture	73,000	187,000	75,400	100,300	14,300	–	–	450,000	2.1
Architecture (architects and critics)	13,000	67,000	20,000	40,000	10,000	–	–	150,000	0.7
Architecture (exhibitions)	60,000	120,000	55,400	60,300	4,300	–	–	300,000	1.4
Total	6,787,190	5,842,260	3,458,125	2,888,620	1,745,950	113,200	200,600	21,035,945	
%	32.3	27.8	16.4	13.7	8.3	0.5	1.0	100.0	

Source: Canada Council for the Arts. **Special processing by INRS.**

Table 5:
Number of Grants by Type of Request and By Region, Canada Council for the Arts, 2008

	Ontario	Quebec	BC	Prairies	Atlantic provinces	Canadian North	Outside Canada	#	%
Museums	44	15	16	20	11	1	–	107	13.8
Assistance to exhibitions	30	12	11	14	8	1	–	76	9.8
Acquisition assistance	14	3	5	6	3	–	–	31	4.0
Organizations	58	65	27	35	26	3	–	214	27.6
National service organizations	2	2	–	–	1	–	–	5	0.6
Organizations (projects)	32	24	12	17	13	2	–	100	12.9
Artist-run centres	20	26	9	13	9	1	–	78	10.1
Aboriginal organizations	1	1	1	1	1	–	–	5	0.6
Flying Squad	3	12	5	4	2	–	–	26	3.4
Artists	72	67	43	19	13	2	10	226	29.2
Projects	55	44	29	14	8	1	10	161	20.8
Long term	8	12	5	2	3	–	–	30	3.9
Artists & communities	5	6	6	2	–	–	–	19	2.5
Aboriginal artists	2	1	1	1	2	1	–	8	1.0
Visiting foreign artists	2	4	2	–	–	–	–	8	1.0
Critics/curators	3	6	5	2	–	–	–	16	2.1
Independent critics and curators	2	6	2	1	–	–	–	11	1.4
Aboriginal curators (residencies)	–	–	1	1	–	–	–	2	0.3
Multicultural curators (residencies)	1	–	2	–	–	–	–	3	0.4
Dealers	9	5	2	–	–	–	–	16	2.1
International	55	44	24	11	13	4	5	156	20.1
Residencies	5	3	2	1	–	–	–	11	1.4
Travel grants to professionals	48	38	22	10	13	4	5	140	18.1
Major exhibitions	2	3	–	–	–	–	–	5	0.6
Crafts	6	5	1	2	4	–	1	19	2.5
Architecture	4	8	3	4	2	–	–	21	2.7
Architecture (architects and critics)	2	4	1	2	1	–	–	10	1.3
Architecture (exhibitions)	2	4	2	2	1	–	–	11	1.4
Total	251	215	121	93	69	10	16	775	
%	32.4	27.7	15.6	12.0	8.9	1.3	2.1	100.0	

Source: Canada Council for the Arts. **Special processing by INRS**.

The two other types of documents produced by the Canada Council attest to the organization's recent interest in a series of issues pertaining to minority communities. Contemporary Aboriginal arts have been the subject of many consultation and program-evaluations reports since 2004 (five documents).[17] The impact of the Council's activities in rural and isolated areas (December 2001) and within the framework of the Artists and Community Collaboration Program (ACCP) (McGauley February 2006) have also been evaluated. Finally, the Canada Council, along with Canadian Heritage, commissioned a study targeting francophone visual artists living outside Quebec (Gauvin and Haentjens 2001 and 2000). Other publications have been concerned with consultations and/or evaluations of specific programs (the report on artist-run centres 2009) or with the Canada Council's overall mission (the report on the impact of Council grants on the careers of individual artists in 2000). This latter report, which dealt mainly with client concerns regarding the fairness of the system, was undoubtedly what led to the creation of an Equity Office.[18]

At the provincial level, the CALQ is also a major source of data.[19] Visual arts data are often treated in a more systemic manner, and disseminated more systematically. For nearly a decade, this public body has been publishing a regular bulletin (the *Constats du CALQ*), which contains sophisticated analyses of the funding allocated to organizations and artists in the sector, and spans long periods: two recent reports present a balance sheet of the financial support provided to professional artists and writers between 1994 – 1995 and 2005 – 2006 (October 2006), and to artists, writers and arts organizations between 1994 – 1995 and 2003 – 2004 (March 2005). These analyses generally also include relevant information on the economic structure of organizations that receive funding—like the artist-run centres in 2003 – 2004 (June 2006)—or on the socioeconomic characteristics of visual artists who obtain grants (October 2006, January 2002).

[17] See, at the end of the chapter, References: CCA February 2009, July 2009, August 2008, November 2008 and November 2004.

[18] Note also the cross-referenced reports on the changes of leadership and the emergence of new audiences in the arts in Canada (Decode 2007; MacSkimming and D'Entremont 2005) as well as the study of the impact of the new technologies on copyright issues and commercial practices in the arts (Labossière 1999).

[19] Like the CCA, the CALQ commissions major consultations aimed at sector deliberations or mobilization. This is especially true of its *Forum sur les arts visuels au Québec*, which has produced a progress report (*État de la situation*) and a summary (*Bilan-synthèse*) of the forum (2006). One of this report's findings is that there is a pressing need for research in the area of strategic information. We should keep in mind that, shortly after its creation in 1994, the organization also sponsored the *Étude du groupe-conseil sur les arts visuels* (Cardinal 1995).

One recent bulletin (March 2006) dealt with employment and remuneration in the arts organizations that received financial assistance from the CALQ in 2003 – 2004, namely artist-run centres specializing in the visual and media arts. Another bulletin (July 2004) looked at contemporary art exhibitions in artist-run centres.[20]

Moreover, the *Observatoire de la culture and des communications* (OCCQ)[21] updates data on artist-run centres that specialize in the visual and media arts; this information has been collected annually by the CALQ since 1994 from the organizations it supports (OCCQ annual 1994 – 2008).[22] This includes, for example: a) centres' income and expenses between 2001 – 2002 and 2006 – 2007; b) statistics according to income, geographic distribution and categories of artist-run centres from 1994 – 1995 to 2007 – 2008; and c) a study of employment and remuneration according to employment status, geographic distribution and the income level of centres in 1998 – 1999. The most recent data, which goes back to 2008, lists 44 visual-arts centres (as opposed to 18 media-arts centres) generating total revenues of nearly $9.8 million (as opposed to nearly $8.4 million in the media arts). It is immediately apparent that the average aggregate income of the more numerous visual-arts centres falls well below that of the fewer media-arts centres—nearly $223,000, compared to $467,000. The same tables also detail the income structure according to operating revenue, private funding (donations and sponsorships, service exchanges and contributions) and public assistance by level of government.

In terms of documentation, nothing comparable exists in the other provinces. The Ontario Arts Council (OAC) is the only other body that publishes—irregularly—a bulletin (*Artfacts*), which devotes less attention to the visual arts. A 2005 issue did include a profile of 65 of the 78 visual- and media-arts organizations that received support from the OAC in 2004 (OAC 2005); these organizations include 31 artist-run centres and other visual- and media-arts organizations, 31 public art galleries and 3 crafts organizations. It has not been possible to identify comparable publications on assistance to individual artists in the other provinces, perhaps because these

[20] We should also mention a study of a more general nature on the private funding of the arts and letters in Quebec (July 2003). Unfortunately, this has little data of any direct use for the visual-arts sector.

[21] This monitoring body created in 2000 is one of the departments of the *Institut de la statistique du Québec* (ISQ), which is an independent body like Statistics Canada.

[22] http://www.stat.gouv.qc.ca/donstat/societe/culture_comnc/arts_visuel_media_metiers/centre_artiste/index_an.htm

provinces' arts councils are quite simply less involved in funding. One notable exception was a recent evaluation of British Columbia Arts Council programs targeting visual arts organizations (BCAC July 2005)[23]. This report, which includes visual art museums in the category of visual arts organizations, provides a summary and a comparative analysis of equivalent programs in several other Canadian provinces: Nova Scotia (Tourism, Culture and Heritage), Ontario (OAC), Alberta (Alberta Foundation for the Arts), Saskatchewan (Saskatchewan Arts Board) and Manitoba (Manitoba Arts Council).

With regard to public art, only the Quebec government provides systematic and recurrent information on its programs, which come under the jurisdiction not of the CALQ but of the *Ministère de la culture, des communications et de la condition féminine* (MCCCF), which sponsors the CALQ in the same way that Canadian Heritage does the Canada Council. The MCCCF produces not only annual reports but also analyses covering long periods. The most recent report (MCCCF August 2009) shows that, over the past decade, the budget has varied by more or less $3 million annually, and supported a little over 50 projects each year. In 2006 – 2007, the last year for which data is available, the average cost of a project was a little less than $54,000. Based on OCCQ data (2001 – 2008),[24] the average value of purchases between 2003 – 2004 and 2007 – 2008 was over $3.6 million per year for 85 works, an average value of $42,666. In 2007 – 2008, the program recommended 86 projects, representing $4.1 million. Most were sculptures (39), or installations or environmental works (21), but there were also a many photographic or digital images (18). These ratios seem consistent from year to year.

The Canada Council and the CALQ thus generally possess high-quality recurrent data on the evolution of funding for direct-assistance programs targeting artists and non-profit arts organizations. The substantial support the OCCQ provides to the CALQ is also worthy of mention. The contributions of the other levels of government, whether provincial or municipal, is less clear. The situation of artist-run centres appears to be better covered at the federal and Quebec levels. Information on artist-run centres is harder to obtain outside Quebec, although the two national associations of artist-run centres have sought to offset this lack: an initial study on the working

[23] http://www.bcartscouncil.ca/documents/publicationforms/pdfs/Public%20Museums_VA-Sept05.pdf
[24] http://www.stat.gouv.qc.ca/donstat/societe/culture_comnc/arts_visuel_media_metiers/oeuvre_art/index.htm

conditions in member centres, which was ongoing when we began this research, was tabled last summer by the the Artist-Run Centres and Collectives Conference (ARCA) and the Independent Media Arts Alliance (IMAA) (Gauthier 2010), and a number of provincial associations have also attempted to bridge the gaps at provincial levels, including in Alberta (AAARC/Sivak 2005) and in the Atlantic provinces (AARC/Terris 2004).[25] Perhaps this momentum will help extend the habit of data collection and analysis to all the provinces and make data more consistently available. The production of information on individual grant holders seems to be a less frequent endeavour. There is also a glaring lack of information on the number and type of public-art projects funded at the municipal level; that works remains to be undertaken.

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[25] In Quebec, the RCAAQ also conducted a study of this type in 2006 (RCAAQ 2006) as a follow-up to a similar project carried out earlier in conjunction with the *Conseil québécois des ressources humaines en culture* (CQRSC 2000 and 1999).

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CHAPTER 3

VISUAL ART MUSEUMS: THE PUBLIC/PRIVATE WORLD OF THE COLLECTION/EXHIBITION SYSTEM

3.1 Chapter Overview

Visual art museums constitute a third central mechanism in the ecosystem of the visual arts. At the junction between professional art circles and art audiences, museums are one of the main promotional tools for the visual arts, and also fulfil a double function by both collecting works and mounting exhibitions. This two-pronged role of conservation and dissemination contributes to the development of a national artistic heritage, but one that is not strictly Canadian. Like their foreign counterparts, Canadian museums are not devoted exclusively to the conservation and exhibition of locally produced work, and a national museum heritage is actually created in part through the acquisition and exhibition of works that could have been produced by artists from anywhere. The relative Canadian and international weight, and the respective arguments in their favour, are generally a central aspect of the policies of the various museums within a given territory. While the works exhibited in this country's museums are not strictly Canadian, neither are the audiences for whom they are intended—foreign tourists make up a significant contingent of museum clientele and some museums may tour exhibitions abroad or attempt to position their collections within more global context. These institutions thus function as intermediaries between Canadian and foreign artists and art audiences.

In Canada, government action on behalf of the arts has always involved the disbursement of operational grants for visual arts institutions, and sometimes have even entailed a direct management role in those institutions. More often than not however, visual arts institutions are independent organizations that operate according to a mixed governance model; because of their funding and governing board structure, they may be considered both private and public. They are also part of a larger museum and heritage apparatus. The difference between Canadian visual art museums and other type of museums (ethnological and historical, scientific and technological, etc.) lies in their development. In Canada, as elsewhere in the world, art museums have come to play a novel and increasingly significant role in the development of contemporary visual art. After simple beginnings as a tool for the conservation and promotion of the nation's established artistic heritage, art museums have gradually become an instrument for seeking out and promoting contemporary art. Long confined to a marginal role in the acquisition of contemporary art, the art museum underwent, as it were, a coming of age that has made it one of the main players in the contemporary art market. The evidence of this pivotal position in contemporary art remains indirect, however. And, as before, the art museum's role in the purchase of old or contemporary works of art is strictly marginal: most of its acquisitions are in the form of donations.

Indirect intervention in the art market in Canada increased with the 1977 Cultural Property Export and Import Act, which currently allows government-recognized museum donors to claim tax deductions for their donations. In 1991, the responsibility for determining the market value of cultural property for income tax purposes was transferred from Revenue Canada to a commission under Canadian Heritage. That same year, a change to the Income Tax Act also entitled artists who donated works during their lifetime to a tax credit. This benefit was extended in 1999 to include artists' estates. Other amendments have been made to the system since that time, particularly with regard to the criteria and methods for determining the (inextricably economic and symbolic) values of artworks: how determining their "national value" and "fair market value" were then considered with meticulous care. Between 1990 – 1991 and 2003 – 2004, the number of donations by artists went from a dozen (1% of donations, or $419,070) to 145 (15%, or the equivalent of $6.1 million).[26] In 2007 – 2008 (the most recent data available), we counted 118 donations of works of contemporary Canadian art, the value of which for tax exemption purposes was established at $8.8 million (Canadian Heritage 2009).

In their evolution towards contemporary art, art museums have also fostered and supported the development of artworks conceived specifically with public museums in mind. "Museum art" has come to be relatively distinct from the traditional production generated by the strictly private demand of the end user in the individual-consumer market. Still, museums continue to play a key role in promoting art on the market: the artworks and the artists who gain museum acceptance benefit from unexpected economic and symbolic surplus value on the market.

[26] See Canadian Heritage (2005), Appendix 1 – 9.

3.2 Available Data

While there is ample documentation on Canadian museums, most of it is not directly concerned with the specific issue of art museums; rather, the available information focuses more broadly on all types of museums, and on the heritage sector as a whole. At the national level, specific documentation on art museums hinges on funding (the value and structure of public/private funding) and on museum attendance—that is, the public. [27] Statistics Canada has compiled basic data in both categories, but this information is generally amalgamated with other data on the entire range of museological and heritage institutions (including zoos, botanical gardens and national parks) and remains fragmentary. In Quebec, since the late 1990s, a more systematic and ambitious attempt has been made to take stock of the entire spectrum of the province's museums. The museum system in general does not lend itself to nuanced analyses, to a consideration of the situation specific to art museums, nor to an evaluation of art museums' particular role in the development of the visual arts.[28] There is not enough information at either the federal or provincial level to define the fundamental impact these museums have had in the collection and exhibition of Canadian visual art. At the federal level, most of the basic data that would be required to evaluate the effect of art museums is currently insufficient: the number of art museums; organizations' funding structures and size; the value and nature of acquisitions (purchases/donations, ancient/contemporary, Canadian/foreign); the evolution of budgets set aside for exhibitions of work by contemporary Canadian artists (particularly with regard to artists' fees, catalogues, etc.). A few recent studies do provide relevant information on museum funding and attendance. In addition, the annual reports of the Canadian Cultural Property Export Review Board make it possible to sketch an initial profile of the main institutions currently active in Canadian art acquisitions.

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[27] Recent documentation dealing specifically with art museums often concerns topics of a more sporadic nature (volunteer services, controversies surrounding a piece) or individual cases, without relating them to the sector as a whole. The report of the Canadian Museums Association on volunteerism (CMA 2001) falls into this category; linked to the uneasy response to the drop in volunteers noted by StatsCan between 1996 and 1999, the CMA report also grew out of a specific set of circumstances surrounding the International Year of Volunteers. It was considered a first step, but appears to have had no follow-up.

[28] MCCCF/Santerre and Garon (July 2000); MCCCF (May 2000) and MCCCF/Montpetit (May 2000). For a more recent perspective, see the OCCQ's nine-volume *État des lieux du patrimoine des institutions muséales and des archives*, the third volume of which deals with museums: http://www.stat.gouv.qc.ca/observatoire/publicat_obs/pdf/cahier3etatdeslieux.pdf.

Funding

At the national level, the most comprehensive (but also the most perfunctory) recurrent data on this entire museological apparatus come from Statistics Canada's annual survey of heritage institutions. The most recent document available dates from 2009 and deals with data from 2006 – 2007.[29] This service bulletin provides information on the subset of public art museums and non-commercial art galleries, the definition of which is based on the North American Industry Classification (NAICS 712111).[30] A random sample survey (n=633 in 2007), it provides an estimate of income and expenditures for the category throughout Canada, but without estimating the number of institutions or including breakdowns by province or territory. In 2007, the income and operating expenses rose to a little over $250.5 million and $249.2 million respectively, for an operating spread of $500,000. Salaries, wages and benefits accounted for slightly more than 42% of these expenses ($105.5 million). These museums and art galleries brought in nearly one-quarter (24%) of the heritage sector's total revenue,[31] as opposed to 53% for the other types of museums; they received 28% of the total amount of grants and public financial assistance to non-profit organizations in the heritage sector, while the other types of museums received 60%. From this point of view, public art museums and non-commercial art galleries do not seem especially pampered.

A recent study by Hills Strategy Research (HSR November 2008) provides a more detailed estimate of the funding structure of these organizations. This analysis is also based on another annual survey—the *2006 – 2007 Annual Survey of Public Museums and Art Galleries* by Business for the Arts (BFA, unavailable). This survey, conducted on a voluntary basis, was completed in 2006 – 2007 by 113 museums and art galleries, including 52 art museums, 12 art galleries or museums affiliated with universities, 11 artist-run centres and 38 other types of public museums. According to HSR, the whole of the sample represents a significant share (70%) of the operating revenue of the entire range of Canadian organizations of this type (estimated at $712 million by

[29] See Statistics Canada 2009, April 11, 2008 and March 29, 2007.

[30] The definition reads as follows: "This Canadian industry comprises establishments primarily engaged in acquiring, researching, conserving, interpreting, and exhibiting art to the public. Art museums and art galleries with permanent collections are included." Excluded are "commercial art galleries and art dealers who operate primarily for the sale of art objects."

[31] Apart from art museums and galleries, the category of heritage institutions includes other public museums (ethnological, historical, scientific, etc.), historical sites, sites of heritage significance, zoological and botanical gardens, along with other types of heritage institutions not classified elsewhere, such as parks and nature reserves or conservation areas.

StatsCan[32]). The total operating revenue of these 52 art museums reached $120 million in 2006 – 2007 (i.e. nearly half of the StatsCan subset: 48%), for an average of $2.3 million per museum. These 52 art museums counted 2.7 million visitors that same year. As with the preceding study, the small number of cases did not allow for a province-by-province analysis. A different database can also explain certain observational divergences from the previous study, particularly with regard to the operating spread.[33] This report does allow us to compare the economic structure of these art museums with that of other types of museums nationwide, in more detail than Statistics Canada.

With regard to funding structures, the study first reveals that the percentage of income art museums received from the public sector (48%) was much lower than that of the other museums surveyed (74%); their actual income (32% as opposed to 20%) and income from private assistance (19% as opposed to 6%) furthermore represented much higher percentages than for other museums (HSR 2008, p. 35). The report also provides detailed information on the structure of sources of income. Contributions by provincial governments constituted the second-largest source (30%) after earned income (32%), ahead of municipal support, which (12%) was hardly negligible, and even farther ahead of the federal government, whose support counted for very little (5%, with 3% from the Canada Council). At 19%, private sources of funding ranked third, behind provincial support.[34] A tiny fraction (1.3%) came from other public sources.

The report also provides a profile of the evolution of museum income over the past 10 years (1996 – 1997/2006 – 2007) for 36 of these museums (those that took part in each annual survey since that time and have proven to be the most solid and stable). These major art museums have apparently enjoyed "real income growth" (13% after adjustments for inflation) during this peri-

[32] *Annual Survey of Service Industries: Heritage Institutions.*

[33] These organizations' total expenditures ($123 million) were slightly higher than their incomes ($120 million), for an annual deficit of $2.9 million. These deficits decreased any accumulated surpluses ($1.5 million by the end of the 2006 – 2007 fiscal year). A little over three-quarters of these art museums (77%) claimed that they had either a surplus or a balanced budget in 2006 – 2007; the other 23% calculated deficits amounting to over 2% of their total income, and five stated that they were running deficits that outstripped their income by over 10%.

[34] Donations from individuals (7% of total income), businesses (1.3%) and boards of directors and volunteers (0.9%) were noticeably higher than income from special fundraising campaigns (5%), foundations (3%) and sponsorships (3%). In all, 30 museums declared that they had endowments, the value of which ($54 million) represented 62% of these organizations' total income.

od. However, increases in expenditures (at 16%) have outstripped income. The greatest income increases (62%) have been from the private sector, while public funding had increased by a mere 1% (actual income has remained stable). These figures show a significant change in income structure during the period in question: while actual incomes have remained stable (at 30%), the private sector has gone from 14% to 20% at the same time as the public sector contribution has dropped from 56% to 50%. More revealing still would be data on changes in public contributions from all three levels of government. Additionally, attendance at these 36 art museums has grown, by 8% (that is, from 2.9 million to 3.1 million visitors).

An earlier and more qualitative study conducted by HSR on behalf of the Ontario Arts Council (HSR 2005 a and b) offers a glimpse of the constraints under which these organizations currently operate. The two-volume study begins with a summary of the opinions expressed by representatives of the 39 museums and visual art galleries that belong to the Ontario Association of Art Galleries (OAAG) in a 2003 survey (Data Exchange 2003). The second volume is a qualitative study involving representatives of 15 of these museums and art galleries. The first volume compares the responses of 23 of these institutions with the answers they gave in a 1993 version of the same survey.[35] An analysis of their operating budgets (income/expenditures) for 2003 breaks down the sources of income of 34 of these institutions as follows: government sources, 63%; independent sources, 25%; private sources, 11%. However, when we exclude the three largest museums, the percentage of income from government sources drops to 55%.[36]

Although an analysis of developments in the reference period shows a noticeable increase in income (71%), most of the respondents were worried about where their funding would come from in the future. Compounded by a relative decrease in public attendance, art museums' competition for private-sector funding with other non-profit organizations (healthy, social services, sports) seems fierce. A significant proportion of the income growth comes from an increase in independent sources of income (27%) and from contributions from the private sector (398%). The

[35] Note that three large museums were part of this sample: the National Art Gallery, the Art Gallery of Ontario and the McMichael Collection). These three alone generated nearly 83% of the total income of the entire sample ($109.4 million). The first two accounted for over 50% of attendance (three other museums reached attendance figures higher than 100,000) and 41% of the collections (180,000 works).

[36] Only 34 of the 39 museums provided such information.

latter contributions, which were nearly nonexistent at the outset, have gone up noticeably, from $2 million to $12 million during the period in question. Although government assistance has also increased (27%), the percentage of government funding against overall contributions has dropped, from 85% to 63%.[37] The decline in government contributions was even more pronounced for smaller institutions.[38]

Among other things, this survey highlights the growing recourse to donations of works for acquisition. Donations, which, in 1993 already accounted for 80% of acquisitions for the 21 museums with permanent collections, had risen to 98% by 2003; the number of purchases, meanwhile, has dropped, from 430 in 1993 to 240 in 2003. The value of donations has risen from $19 million to $128 million. Donation and donor management appears to have become an increasingly strategic function in museums' daily operations, and is now a central aspect of public relations. The second volume points out, "as one gallery director noted during an interview, the gallery 'nurtures relationships with artists and collectors to continue to ensure that the collection is strong and vibrant'" (OAC/HSR 2005 b, p. 14). Refusing certain donations and steering donors toward other types of contribution is indubitably one of the current duties of museum professionals. The complexity and evolution of the donation system, along with competition from other non-profit organizations to recruit higher profile board members, mean that arts organizations are no longer necessarily at the top of the list for potential volunteers (Ibid., p. 21).

The annual reports of the Canadian Cultural Property Export Review Board (Canadian Heritage 2009 and 2005) shed some light on the strategic aspect of art donations to public museums. The cumulative report for the period, from 1992 – 1993 to 2003 – 2004 (Canadian Heritage 2005) also tracks the development of the certification system over a longer period. The Board, which currently has a maximum of 10 members,[39] is tasked with determining the "outstanding significance" and "national importance" and the fair market value of the works submitted for certification. Consultations in 1994 led to the establishment of guidelines for evaluating outstanding sig-

[37] Adjusting the data for inflation shows a lower increase overall (42%); the rate of growth in the private sector (314%) and for independent income (211%) remained strong compared to government contributions (6%).

[38] This impact is even more noticeable after adjustments for inflation: excluding the three large museums mentioned above, the 18 other institutions together account for a significant decrease (12%) in government assistance.

[39] Two members of the public, four directors, members or employees of museums, archive centres, libraries or other likeminded institutions, and four dealers or collectors.

nificance and national importance;[40] and modifications 1998 and 2000 were intended to strengthen the integrity of the system.[41] Although the reports are short on detail regarding the nature of the works and the artists and other donors who have made use of the system, the list of government-approved recipient institutions and public administrations does no more and no less outline a profile of the museums that are the main collectors of Canadian art.

To receive government certification, an institution must first demonstrate its capacity to preserve the cultural property in question in the long term and to make it accessible to the public for exhibition or research. The designation may also be attributed for an indefinite period for all objects corresponding to the institution's collection mandate (Category A), or for a specific occasion pertaining to a sale or donation (Category B). In 2007 – 2008, Category A comprised 278 institutions and administrations; that same year, eight Category-B designations were also granted. In Quebec, for example, 13 of the 66 designated bodies clearly met the objective of collecting or exhibiting contemporary visual art.[42] In 2007 – 2008, 849 certification requests representing a fair market value of $170.4 million were received. Nearly all concerned donations (95.4%), and almost 70% of them (584) pertained to art objects (paintings, works on paper, and sculptures). The fair market value of all donations was set at $164.3 million,[43] while the fair market value of

[40] See Appendices 1 – 4. The guidelines are: "1) close association with Canadian history; 2) close association with national life; 3) aesthetic qualities; 4) value in the study of the arts; and 5) value in the study of the sciences." Certification requests must meet most of these criteria. Regional factors are also taken into account, as is the relevance of the institutions' acquisitions mandate and its collection. For example, an early painting may be considered an important element in a collection because it shows an artist's development, but may not be deemed of national importance in a collection that does not include any works by the same artist. There is also a strong distinction between a collection and an aggregation of items of cultural property: the whole must be shown to be more than the sum of its parts. Biographical and contextual information must be included in arguing for the importance of an artist or collector. Works executed in the three years prior to the certification request are not normally considered to be of interest.

[41] In 1998, the period during which the designated institution or administration must keep the certified cultural property without being obliged to pay a special tax was extended from five to 10 years. The established fair market value then became effective for two years (even if the donation or sale was withdrawn after the value was established). Since 2000, agreements for taxation purposes that contain false or misleading statements are subject to new and more severe financial penalties.

[42] Most of the institutions are associated with libraries and archives.

[43] Less than 4% pertain to sales, while less than 1% concerns splitting of donation receipts.

donated artworks was $85.6 million.[44] A significant number (118) were contemporary Canadian works, valued for tax exemption, as mentioned above, at only $8.8 million. These donations of works originating with or created by living Canadian artists thus constituted 5.1% of the total fair market value of certified cultural property (and 14% of the certification requests received). The cumulative report from 1992 – 1993 to 2003 – 2004 tracks the evolution of these certifications over a longer period; during this time, the Board assessed an average of 1,085 certification requests each year, for an average certified value of over $127 million per year. Most of these pertained to donations (97%), and objects falling in the category of fine arts consistently accounted for about 72% of all cultural goods certified annually. A large percentage (85%) pertained to works of contemporary Canadian art.

Very little is known about the acquisition practices of Canadian visual art museums. An annual survey by the OCCQ does track the evolutions of acquisitions in Quebec since 2001 – 2002; the OCCQ survey distinguishes among four types of collecting institutions, including museums. Museum acquisitions can be compared to those of the three other types of institutions: businesses, municipalities and institutions that benefit from the MCCCF's program for the integration of art into architecture (the so-called "1% policy"). The most recent edition of this survey, for 2007 – 2008 (OCCQ November 2009),[45] shows yet again the importance of donations for museums. Donations, of an estimated worth of $34.6 million, are equivalent to 91.2% of the total value of museums' acquisitions. A comparison with past years reveals that donations are actually on the rise, and in fact have never been higher since this survey was first conducted. With regard to conventional purchases, the largest proportion in 2007 – 2008 went not to museums but to institutions subject to the 1% policy (122 works, representing $3.3 million). On average, however, museums have kept the lead over the past five years ($4.5 million, and 1,308 works). Note that the majority of the works purchased by these four types of institutions (52%) cost under $1,000

[44] That year, 25 objects listed in six requests and all belonging to the category of art objects did not meet the criteria of "outstanding significance" and "national importance," and thus did not obtain certification. The other categories of certified cultural property included the decorative arts, ethnographic artefacts, folklore art, and collections of insects, meteorites, military medals and minerals. Archival items represented 200 requests with a total value of $72.7 million.

[45] This annual breakdown provides data on the number and value of artworks acquired by the four types of institutions. The most recent data have been gathered from 61 Quebec institutions, 33 of which are museums (including four art rental galleries and one art centre). It also covers 23 businesses including Crown corporations that have collections and collect works on a regular basis, four large cities with art acquisition policies, and projects carried out under the aegis of the MCCCF's 1% policy (66 institutions).

(there is no detailed breakdown by type of institution). Most often, museums turn to dealers for their acquisitions, but only for 61% of their purchasing budget. The institutions favour recent works created since 1990 (77.4% of expenditures). While costly works ($25,000 and more) account for the smallest number of purchases (110 out of 1,277), they account for the largest share of the budget (69%). The survey also features a detailed breakdown of purchases by type of work—paintings, works on paper, sculptures, installations, crafts, public art, etc.—with works on paper accounting for the most purchases (780); this trend has been increasing over the years, while purchases of paintings are in decline. The distribution of types and values of works with regard to donations is not known, but could reveal a very different picture.

Attendance

In the long history of studies on museum attendance in Canada, Brian Dixon et al. (1974) stand out as pioneers. Attendance is generally measured in one of two ways: through surveys that rely on Canadian population samples (based on statements by individuals) or through compilations of attendance figures provided by the museums. The first gauge the viewpoint of the population, while the second give us that of the museums. The two types of data are necessarily incompatible. Population surveys concern only visits by Canadians (excluding non-Canadians) regardless of location (foreign countries are included). Since an individual may visit the same museum several times, measurements based on the numbers of admissions cannot provide an accurate picture of a population's museum attendance; the number of admissions is clearly a more accurate indicator of gross attendance. In Canada, most of the recent studies available are self-declarative surveys. Both data-collection methods are used in Quebec, which is the only province that regularly and systematically collects admissions data. Nationwide, there have also been sporadic surveys conducted to gauge Canadians' opinions of their museums; the most recent, carried out by TeleResearch Inc. on behalf of the Canadian Museums Association (CMA March 2003), concerns all types of museums and is therefore not very relevant to an analysis of art museums.

The most recent pertinent study of attendance at art museums and art galleries in Canada dates from 2007 (HSR March 2007). Using data from StatsCan surveys conducted in 1992, 1998 and again in 2005,[46] this study allows us to see the trend that emerged during this period. The information that constitutes the core of this analysis deals with the full range of Canadians' cultural activities, and information pertaining specifically to art museums remains quite perfunctory. An earlier study by the same firm based, also on StatsCan data but dealing specifically with art museums, provides more precise information (HSR March 2003).[47] Each year since 2003, in Quebec, the OCCQ has compiled attendance figures for museums and exhibition centres (based on the numbers of admissions). In addition, a five-year MCCCF study on the cultural practices of Quebeckers tracks the museum-going practices of individual Quebeckers between 1979 and 2004.

The first HSR study (March 2007) shows that, in 2005, 26.7% of Canadians said that they had visited a public art gallery or art museum, including special art exhibitions (in other words, 7 million Canadians). However, fewer than 4% said that they had gone at least five times. A study of the trend between 1992 and 2005 shows a steady increase in attendance, from 19.6% in 1992 (4.2 million individuals) to 24.0% in 1998, and reaching 26.7% in 2005. The 2003 study, which bears only on the data from 1998 and 1992, attempts to draw a portrait of this museum visitor. It shows that Canadians' visits to museums increased in proportion to income (from 16% for those with an annual income of less than $20,000 to 39% for those with an annual income of $80,000 and up) and schooling (from 12.2% for those without a secondary school diploma to 42.3% for those with a bachelor's degree). Entry into university also coincided with a significant leap (29%). There was also significant variation in regard to language: anglophones (26.3%) were clearly more likely to visit an art museum than francophones (18.9%) or allophones (17.7%). On the other hand, there was little variation with respect to age, apart from a decrease as of age 65. Visitors to art galleries were also more involved than non-visitors in other types of cultural activities: performing arts (65%, compared with 29%), festivals (43%, compared with 19%), volunteer activities (47%, compared with 30%), and sports (47%, compared with 34%). The study highlighted a high degree of cross-attendance among art museum visitors: this group is

[46] This was the General Social Survey, which targeted about 10,000 Canadians aged 15 years or older.

[47] This study was sponsored by the Canada Council for the Arts, Canadian Heritage, the Ontario Arts Council, the Trillium Foundation of Ontario and the Alberta Foundation for the Arts.

clearly not only an art-museum crowd.[48] Canadian visits to art museums between 1992 and 1998 (from 4.2 million to 5.8 million in public art galleries, and from 1.8 million to 2.2 million in commercial galleries) increased among men (whose attendance went from 18.2% to 23% of admissions) as much as it did women (from 20.9% to 24.8%). The increase was also noticeable among the various levels of income (it was even higher among the poorest), schooling (higher among secondary school graduates), and age (higher among those under the age of 30).[49] The study also provides estimates of attendance by province:[50] British Columbia (at 31.8%), Ontario (at 25.8%) and Alberta (at 24.5%) were above the national average (24%). The rate was also above average in Saskatchewan (22.3%) and Nova Scotia (21%). On the other hand, attendance was relatively low in Quebec (20.5%), Manitoba (17.9%), New Brunswick (16.5%), Prince Edward Island (13.5%) and Newfoundland (13.8%). Note that the MCCCF figures for Quebec for the same period were more positive than the StatsCan data: in 1999, according to the MCCCF, 30.9% of Quebeckers visited an art museum (Garon/MCCCF December 2000). An assessment of the five-year spread points to a rise in attendance, which went from over 23% in 1979 to nearly 31% in 1999. The data from the last five-year survey available on the OCCQ website (ISQ/OCCQ 2004) also establish a higher attendance rate (31.9%). The respective values of the two sets of data will have to be verified. It is possible that the Quebec figures do in fact overestimate Quebeckers' interest in art museums; it is also possible that StatsCan may have underestimated the interest of Quebeckers, if not of all Canadians.

The second method, a tally of admissions, has been particularly popular in Quebec since the start of the last decade. Since 2003, the OCCQ has repeatedly gathered and analyzed the admissions data collected by museums and similar institutions (including exhibition centres and performance spaces). This study, a survey of participating institutions rather than a public poll, had a response rate of 98%. Based on combined tickets sold and free admissions, the analyses distinguished art museums from other types of museums, and exhibition centres[51] from other heritage facilities

[48] Apart from the increase in the number of visits to art museums noted between 1992 and 1998, there was also a slight rise in the number of visits to commercial art galleries (from 8.5% to 9.2%). See table in HSR (March 2003) p. 6.

[49] With regard to linguistic groups, the increase was smaller among francophones than among anglophones.

[50] See HSR (March 2003), figure 4, p. 10.

[51] This last category excludes artist-run centres but includes all other visual art institutions that, unlike the museums, do not have collections. It includes, among others, the exhibition rooms of the Montreal *Maisons de la culture*.

devoted to history or science. These compilations also provided a breakdown for each of Quebec's 17 administrative regions. Monthly data were gathered from these institutions on a quarterly basis. The monthly data accessible online (OCCQ 2003 – 2009 annual survey) appeared in an annual bulletin published by the OCCQ.

The last edition of this bulletin deals with data from 2009 (OCCQ/Routhier May 2010), analyzing 419 museums (including 19 art museums, out of a total of 123 museums) and 64 exhibition centres (compared with 232 science and historical interpretation centres). Half of the art museums are located on the island of Montreal, while some regions have none at all.[52] The exhibition centres, on the other hand, are distributed much more evenly: while the island of Montreal includes 15 (mainly connected with *Maisons de la culture*), 49 are located in 15 of Quebec's 17 administrative regions. The bulletin also supplies an analysis covering the past five years. Between 2005 and 2009, the 19 art museums recorded an average of 1.45 million admissions, compared with 3.1 million for the 79 history museums, and 3 million for the 25 science museums. Exhibition centres recorded an average of 574,000 admissions, compared with 2.37 million for 187 historical or ethnological interpretation centres and 1.54 million for the 45 science-focused interpretation centres. In 2009, the entire range of art institutions (art museums and exhibition centres) therefore recorded 1.9 million admissions, a pronounced drop after four consecutive years of increases. Note that this decrease concerns only general clientele, since student attendance was on the rise. The analysis devotes special attention to various categories of clients: school groups (8.5% of museum clientele), individual visitors (78%), organized groups (10%) and extramural visitors or others (4%).[53] In 2009, school groups accounted for 7.9% of attendance figures recorded by art museums, and 11.3% of those recorded by exhibition centres; the respective figures for other groups were: individual visitors (80.5% and 66.9%), organized groups (8% and 7%) and extramural visitors (3% and 14.5%).

[52] The Outaouais, Abitibi-Témiscamingue, North Shore, Laval, Centre-du-Québec, Chaudière-Appalaches and Gaspésie/Magdalen Islands regions.

[53] Despite the increase in student attendance, art museums and exhibition centres have drawn only 17%, compared with 47% for history museums and 37% for science museums.

The *Observatoire* also provides 2008 – 2009 figures on the exhibitions with the highest attendance of Quebec's big three[54]: the Montreal Museum of Fine Arts (MMFA), the *Musée d'art contemporain de Montréa*l (MAC), the *Musée national des beaux-arts du Québec* (MNBAQ). Attendance at the three major MMFA exhibitions that year fluctuated between 130,420 (Andy Warhol) and 140,369 admissions (Yves Saint-Laurent). At the MAC, they fluctuated between 43,171 (Geoffrey Farmer) and 65,436 (the Triennale). Meanwhile, the two major exhibitions held at the Quebec museum of fine arts drew MNBAQ records of 122,261 visitors (*Québec et ses photographes*) and 464,576 (*Le Louvre à Québec*). Another noteworthy study looked at the Art Gallery of Ontario's major exhibition (the Barnes Exhibit), analyzing the role of cultural tourism in regard to the current global competition for major cities (Carmichael 2002). This last kind of study recall us that there is as little knowledge about the numbers of Canadians who visit museums in Canada and abroad as there is about the number of foreign tourists who visit Canadian museums.[55]

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[54] See OCCQ 2007 – 2008.

[55] On this subject, see the recent study by Bergeron published by the OCCQ (March 2008). Unfortunately, this deals only with the whole ranges of museums while confining itself to Quebec.

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CHAPTER 4

THE ART MARKET, A MULTIPLAYER SYSTEM IN THE ERA OF GLOBALIZATION

4.1 Chapter Overview

The art market represents another aspect of the apparatus and the current environment of the visual-arts sector. This competitive aspect that can be overlooked, just as its importance can be overestimated, is more than everything an intricate game involving many players, and many levels of play. The once national and even local context of art trade has become ever more complex, stimulated if not downright driven by the globalization of cultural markets, and, in the case of this analysis, of contemporary art market. This section begins with a consideration of the issues arising from this increasingly global market, and goes on to consider available Canadian data.

Multiple Players, Many Levels

The gallerist, whose space enacts a public presence, undeniably plays a central role in the art market, not only as the primary retailer of artwork, but also as a buyer, most often purchasing directly from artists. This pivotal role between supply and demand is not exclusive, however, and many other commercial “operators” also act as art dealers.

Any discussion of the market must first distinguish the primary market from the secondary or resale market: the first is chiefly a network of commercial galleries, is more directly involved in contemporary or current art, and is supplied largely by living artists, while the latter consists mostly of auction houses whose purview has traditionally been old or canonical art, and for which estates and major private collectors are the main suppliers.

These two types of markets and operations compete for the same clientele—buyers who include private individuals, private corporations and foundations, and public or government bodies. The boundaries, it should be noted, are blurred: just as an art museum is not an entirely public entity, neither is the market entirely private, and there are many non-commercial operators within the commercial art market. Aside from entirely public, government, bodies, the art historians, critics and curators not directly involved in commercial activities also play an important (and sometimes inadvertent) economic role as promoters, and as market prospectors.

Additionally, a key player of this system is of course the artist, who is both entrepreneur and primary supplier. By seeking to participate in these commercial and financial cycles during their lifetimes, artists enter into competition with their peers, who are also supplier-entrepreneurs; as well, because many artists sell their work directly, without the involvement of a third party, whether through public or private commissions or in direct sales to museums, private collectors or individuals, they are also occasionally in direct competition with bricks-and-mortar dealers.

Often presented as un unregulated, dog-eat-dog battle for market control or monopoly, the art market and its competitive relationships can also be thought of as a community, with not only competition among the players (a collectivity we will shortly analyze in more detail), but also a certain solidarity regarding the rules of the game. The flaw in this competitive system lies in its asymmetry: taken individually, each player seems aware of only a portion of the rules.

In Canada, there are two main approaches to defining the commercial and competitive situation in the visual arts: the first, macroeconomic, approach, seeks to establish the overall value of the market from a national perspective, taking into account foreign and domestic sales and purchases; the second, microeconomic approach focuses instead on the conditions and factors affecting the development of businesses and the success of entrepreneurs in the art market. A third less common approach in Canada tries to make out the various segments of the market. Indeed, there is not really one perfectly integrated art market, but rather a series of loosely connected links within that market, operating based on the nature of the product in question (old/contemporary, Canadian/foreign, traditional/innovative, etc.) and/or of the type of buyer involved (households or individuals, businesses, foundations or private corporations, public or semi-public institutions, etc.). Each approach poses particular challenges.

Regardless of methodology, however, any comprehensive perspective of the commercial situation of the visual arts presupposes a consideration of the various players involved and of the dualistic nature of the market—internal and external and private and public supply and demand. To avoid oversights, any quantification of commercial artistic activity must be able to reconcile all of these various factors. Knowing all the players and all the rules involved is not always possible in any of the three research approaches: our knowledge of the structure and the dynamics of Canadian art galleries, although it has progressed over the years, remains incomplete; and our understanding of auction houses, which in Canada are often subsidiaries of international firms, and of the identity of major private individuals and corporate, whose purchases furthermore are not limited to Canadian art, is more wanting still. Research also rarely takes into account the indirect effect of the public sector and of non-commercial operators, one example of which might be tax exemptions for donations of artworks that could be indexed for secondary markets.[56] The so-called economics of the visual arts is not limited to strictly commercial operations.[57]

Auction houses, collectors and the public sector play a no less strategic role than galleries in setting prices and in shaping the status of artists. More than in other arts, pricing in the art market is heavily influenced by the identity of the primary author, the artist; the principle of originality is the first criterion of value. A work of art is not a serially produced product, and its market value depends on its uniqueness. This is true also for more "industrial/commercial" artworks: the name of the artist, the signature, is proof of the work's authenticity and originality. The confirmation of originality (whatever else that originality may conceal or comprise) is central to the value of the art product (whether it is a moveable good, such a painting, or a service, like a museum exhibit). Because of the value of originality and authorship, art dealers (galleries, auction houses, etc.) not only vie for the same clientele, they are also in competition for the supply of artists, and for the products-cum-suppliers they seek to represent and to sell.

[56] Nor does a strictly transaction-based approach (including sales and tax exemptions for art donations) take into account the total financial gains that, while they are directly linked to the production of artworks, are no longer related to a goods economy, but to a service economy, encompassing exhibition honoraria and royalties.

[57] The economic influence of non-commercial operators is evident on at least two levels—regarding trade regulations (copyright, the export of cultural property act, etc.), and in the attribution of value. The acquisition and exhibition choices of these non-commercial, public, private or public/private operators, along with those of many independent stakeholders (art critics and historians, independent commissioners, art periodicals, and so on) affect the value of works on the ultimate market, that is, Canadian households. Non-commercial operators thus participate directly in determining commercial worth: they create value.

The Globalization of the Contemporary Art Market

This commercial/competitive complexity has increased particularly due to globalization: the current Canadian art market is not made up exclusively of Canadian products (artworks), suppliers (artists) and dealers (galleries and auction houses), but includes many foreign components, and Canadian products and players are likewise involved in foreign markets. This international porousness is not new, but the globalization of cultural markets, incontrovertible already since the 1980s, has amplified it. The emergence of the major international art fairs is one of the indicators of this globalization, as is the development of annual lists of the internationally top-rated one or two hundred contemporary artists and major collectors.[58]

The globalization of the contemporary art market colours the entire contemporary period, and has certainly contributed to the current structure of the Canadian visual arts world. While there has long been an international art market, it once almost exclusively concerned the ancient-art market. The first major international art fairs emerging in the 1960s and 1970s (Cologne 1966, Basel 1970, Paris-FIAC 1974) paved the way for a veritable explosion in the number of art fairs, of which Chicago (since 1980), ARCO-Madrid (since 1982) and London-ICAF (since 1984) are among the oldest and most important. Art fairs evolved from the commercial sector concurrently with the rise of international biennales, triennales and other regular events, although these are not overtly commercial, and straddle the public and semi-public sectors. A full list of exhibitions remains to be compiled: the Venice Biennale, founded in the nineteenth century, is the oldest, the quinquennial Kassel “documenta” was established in the 1950s, and many other exhibitions followed in the 1980s.

Like the primary gallery market, the development of the secondary market has been shaped by globalization—marked, for instance, by the creation of contemporary-art departments at Christie’s and Sotheby’s during this period. These auction houses, which until fairly recently dealt exclusively in ancient art, began to compete on the contemporary market that had long been the domain of galleries. The recent sale of a complete show by the British artist Damien Hirst direct-

[58] These annual best-ofs are published respectively in the German *Capital* under the title *Kompass*, and in the American *Art News*.

ly through Sotheby's[59] without the mediation of a gallery is emblematic of this new contemporary art market. The regular publication of contemporary-art auction directories is another indisputable indicator of the globalization of a secondary contemporary-art market.

Globalization has uncloistered national markets. The contemporary-art market, once local or national in scope, now extends through a tight network of annual fairs and exhibitions that bring together art dealers, collectors, exhibition and museum curators, editors and art critics. Inextricably linked to both the public and the private, these events are highlights on the global art scene. Canada came late to the party; the Toronto International Art Fair (TIAF) was not created until 2000. While Canada remains marginal, however, the Canadian art market is not impervious to globalization, and Canadian dealers are increasingly trying to participate.[60] Canadian art has historically measured itself against and responded to foreign art; the very spirit of Canadian art market is affected by international trends. The presence of Canadian artists and art dealers on the international market ultimately increases the symbolic and economic value of the works they produce and circulate.

4.2 Available Data

There are two types of data that provide information on the current state of the commercial situation of art in Canada: "official" data and summaries produced regularly by public statistical bodies such as Statistics Canada, and more probing research commissioned by governmental and non-governmental cultural organizations. Among these latter studies, some offer an overview of the economics of the art market while others provide more specific analyses on foreign trade and on Canadian contemporary art galleries' international strategies in a global climate.

[59] On the subject, see Thornton 2008, p. 38, whose entire chapter on major contemporary art auctions is strongly recommended.

[60] See the recent action plan developed by the Art Dealers' Association of Canada (Canadian Heritage/Feheley 2007). See also the Cultural Human Resources Council website (2009), and *The Art of Export Marketing of Cultural Products and Services* guide to the development and the management of international products and services marketing for artists and cultural workers, and includes resources, advice and traps to avoid to reach international buyers and audiences. Developed in 2002, the site was updated in 2009 (www.culturalhrc.ca/em/pdf/CHRC_TheArtofExportMarketing-en.pdf). The guide suggests a list of Canadian and international fairs by discipline.

Statistics Canada Data

Statistics Canada regularly gathers and publishes three types of indicators: 1) purchases of art by Canadian households (sales value and number of households who made purchases); 2) sales of artworks by dealers operating in Canada (number of galleries and sales figures); and 3) international trade of artworks (import and export value).

The last available data consulted are from 2004 and allow us to trace the market's evolution since 1999 (StatsCan/Dugas, undated).[61] (Because the category of purchases of works of visual art includes prints and vases, the status of which tends to be more difficult to pinpoint, the data on Canadian household spending on art are less exact than that of the other two categories.) Households spent on average 3.3%, or $43 per household, of their cultural-goods[62] spending on visual arts—artworks, prints and vases. It should be pointed out, however, that barely 10% of households declared such cultural spending at all, and that the actual figures for those who did are an average of $434 per household. It thus appears that a small number of households purchase art, spending a relatively high amount on their purchases. Quebec data collected as part of a study on the practices of Quebeckers over the same period show similar patterns: 7.5% of respondents declare having purchased art (OCCQ 2004). The proportion of buyers increases in correlation to the level of schooling attained, reaching 13% among those with a university education. A typical work of original art rarely sells for less than $1,000, and it can be surmised that cultural spending is accessible to wealthier consumers. Note also that the proportion of Canadian households who purchase artworks seems to have remained stable over the last twenty years.

Data regarding art dealers are only available from early 2000, before which time art dealers fell into the category of Artists' Supply Stores (SIC 6593).[63] The new Statistics Canada classifica-

[61] http://www.StatsCan.gc.ca/pub/87-004-x/2003004/4112754-eng.htm

[62] See Table 1, source cited: Average annual household expenditures on culture goods and services, Canada 1999 and 2004 (current dollars): http://www.StatsCan.gc.ca/pub/87-004-x/2003004/t/4112751-eng.htm.

[63] Since then, however, we have lost track of these suppliers.

tion, by creating an identified group specific to this type of merchant (NAICS 45392),[64] has provided more specific data (numbers, revenues, etc.) on art dealers. The most recent data, from December 2008,[65] list 1,367 Canadian galleries.

Table 6:
Number of Establishments in Canada by Type and Region: December 2008 Art Dealers (NAICS45392)

Province Or Territory	**Employers**	**Non-Employers / Indeterminate**	**Total**	**% of Canada**
Source: Statistics Canada, Canadian Business Patterns, December 2008.				
Ontario	191	322	513	37.5%
Quebec	143	149	292	21.4%
British Columbia	135	152	287	21.0%
Alberta	75	66	141	10.3%
Manitoba	22	22	44	3.2%
Nova Scotia	17	19	36	2.6%
New Brunswick	13	11	24	1.8%
Newfoundland and Labrador	11	5	16	1.2%
Northwest Territories	4	1	5	0.4%
Yukon Territory	3	2	5	0.4%
Prince Edward Island	2	1	3	0.2%
Nunavut	0	1	1	0.1%
CANADA	616	751	1,367	100%
Percent Distribution	45.1%	54.9%	100%	

Source: Statistics Canada, Canadian Industry Statistics (CIS).

As Table 6 shows, they are distributed mainly in Ontario (37.5%, 513 galleries), Québec (21.4%, 292 galleries) and British Columbia (20%, 287 galleries). The Prairies also account for a good many of them (185, or 13.5%) but they are mainly grouped in Alberta (10.3%); yet, there are

[64] This industry comprises establishments primarily engaged in retailing original and limited-edition artworks. Establishments primarily engaged in the exhibition of native art and art carvings for retail sale are also included. It does not include establishments whose primary activity is retailing art reproductions (44229, Other Home Furnishings Stores) or operating non-commercial art galleries (71211, Museums).

[65] http://www.ic.gc.ca/cis-sic/cis-sic.nsf/IDE/cis-sic45392etbe.html

none in Saskatchewan according to StatCan[66]. The Atlantic region, for its part, accounts for under 6% and the northern regions for less than 1%. Less than half of these Canadian galleries (45%) have employees. The situation is somewhat different in Ontario where nearly two thirds of art dealers are employers (63%), and it differs to lesser degrees in Québec (51%) and British Columbia (53%). Still, of these 616 galleries with employees, few have more than four. So we are dealing, for the most part, with micro-businesses (1 to 4 employees: 70%) or small businesses (5 to 49: 29%); the group has hardly any mid-size businesses (2) and no big businesses. It would be interesting to know the extent of annual fluctuations in the number of institutions involved in this market, which could be described as volatile. Such information would enable us to determine the extent of annual staff renewals, to estimate the level of volatility of the market and to identify those institutions with the most solid controls. Unfortunately, we were unable to find any such data sets. Information on the number of years that various institutions have existed would also be relevant.

The most recent data on these galleries' revenues, from the Annual Retail Trade Survey, go back to 2007,[67] and reveal sales of $391.7 million in 2007, compared to total operating revenues of $424.6 million. Since 1999, these numbers have increased by 3.3% and 3.9% on average each year.[68] Operating expenses are also on the rise (4.2%), reaching $410 million in 2007, with profits of $14.5 million and a pre-tax profit margin of 3.4%. There is unfortunately no breakdown by provinces and territories, nor by size or type of gallery (micro-, small or medium businesses).

Annual StatsCan bulletins on international cultural-goods trade provide a useful indication of the state of our balance of trade in regard to original artworks. The most recent edition, with 2008 data, indicated exports of $74 million compared to imports of $177 million (StatsCan October 13, 2009).[69] Trade with the United States, which accounts for 80% of our total cultural trade,

[66] Notes that more recent data list twenty-two galleries in Saskatchewan and 1,325 in Canada (December 2009). According to Statistics Canada, this change in establishments count may be affected by methodological changes, i.e. changes in the method of identifying inactive units. The public statistical body does not recommend using these data for longitudinal analysis.
[67] StatsCan Retail Revenues and Expenses Art Dealers (NAICS45392) 1999 – 2008: http://www.ic.gc.ca/cis-sic/cis-sic.nsf/IDE/cis-sic45392rdpe.html.
[68] In 1999, sales were $292.7 million on total revenues of $301.6 million.
[69] Note that the StatsCan definition of art does not include photography, in which category the import/export ratio is slightly better: $122 million/$153 million. See also HSR on international trade (January 2010).

nonetheless shows a more positive import/export coefficient: $53 million/$57 million. Canada's trade deficit, for all cultural goods and for original artworks, has been steady from year to year since 2002.

Overview of Canadian and Quebec Markets

These "official" numbers are somewhat cursory. Two earlier studies sought to define in detail the structure and the dynamics of the art market, taking into account the various stakeholders, but even by the authors' own admissions, the approaches remains exploratory at best. Only one study, by TCI Management for the Department of Canadian Heritage (1999) looked at all of Canada. The TCI study was also the most ambitious, attempting to estimate the overall value of supply and demand in artworks taking into account all commercial and non-commercial operators. Another, more recent, study, by Routhier for the OCCQ (2002), looked only at Quebec, and focused primarily on commercial art dealers (galleries, auction houses and other bricks-and-mortar businesses). Both studies had very different objectives, subjects and methodologies.

The objective of the Canadian study was to provide an overall picture of the monetary value and of the structure of the Canadian art market, taking into consideration all of the economic stakeholders, and from both the perspectives of supply (dealers, auction houses, non-profit galleries, government bodies, other national suppliers, and imports) and demand (Canadian households, Canadian businesses, not-for-profit museums and galleries, government bodies and foreign demand). The study was especially interesting because it distinguished not only the respective portions of imports and exports, but also identified transactions involving Canadian and foreign works respectively. The data that emerged from this analysis remain approximate—the information is extrapolated from variable estimates, identified as being of "medium" or "reasonably good" quality, in most cases, but none of high quality.[70] The author also admits to underestimating the purchase figures for businesses and for auction houses. The gallery data, derived from the earlier statistical classification, are also less precise than those that could be obtained today. The study is noteworthy in highlighting the considerable number of sales completed through other, non-verified national avenues, which were **estimated at $258 million in 1998, for 43% of the**

[70] See the source of Tables 1 and 2.

total sales ($603 million, including sales to intermediaries, and exports). The study also provided an estimate of Canadian demand for visual art by Canadian artists ($414 million) to nearly 87% of the total Canadian demand for works of visual art; purchases of Canadian works by foreign buyers ($62 million) corresponds to 13% of the total demand in this category.
This study furthermore included a range of field research, including two quantitative surveys: one of art dealers, and the other of auction houses. Both surveys had fairly low response rates (18%) and their methodology seems imprecise: out of “approximately” 600 dealers contacted, only 127 surveys were completed, with five out of 27 for auction houses. The firm notes a rather high margin of error of plus or minus 10% 19 times out of 20.

The Quebec study, an analysis of the commercial practices of art dealers, also used a survey of specialized dealers, a category that not only listed galleries but also auction houses and other equivalent bricks-and-mortar art dealers. This study has a much higher response rate (67%).[71] As well, unlike the Canadian study, the Quebec study was carried out not by survey but by census: the 237 Quebec art dealers identified that year (the number is equivalent to StatsCan numbers for Quebec) were contacted, and 183 questionnaires were completed. The study also included the results of an annual OCCQ study of the major Quebec collections. Results provide a more precise profile of the value and the nature of the public (museums and provincial and municipal administrations) and private (corporate collections) institutional demand within the Quebec market. The study considered institutional purchases from specialized dealers separately from those from other sellers (who may not be bricks-and-mortar establishments), and showed that **direct purchases from artists make up 37% of museum purchases**. Purchases by collections without the participation of dealers accounted for 11% ($7.3 million) of the total “official” sales in Quebec ($65.5 million).[72] The study did not attempt, like the Canadian study, to identify the value of the underground supply. Overall sales estimates for art dealers (galleries, auction houses and similar) are aligned with the TCI Management Canada study’s figures—approximately 28% of the sales

[71] The data collection was no less long and laborious, since the study encountered unexpected delays: many establishments did not submit the information requested, and the OCCQ had to statistically estimate relative results for the target population. The results of the study are thus based both on study data and on *Revenu Québec*’s administrative data regarding these establishments. Once again, the data is approximate, albeit somewhat more exact.

[72] Total revenues including all commercial activities of art dealers are $90.5 million.

of these Canadian operators, which corresponds to the demographic proportion of Quebec in Canada (24%).

The study also provides an extremely precise socioeconomic profile for this group of specialized dealers[73] as well as a specific assessment of their professional activities, listing the types of buyers (individuals, businesses, museums),[74] the provenance of the works (Quebec, Canada, outside Canada),[75] the artistic disciplines (painting, sculpture, works on paper, fine crafts and other),[76] and the nature of activities other than art sales.[77] **The study also presented a very interesting indicator, identifying dealers who "represent artists who have work in a museum collection" (68 galleries, or 25%), in order to compare their commercial practices to those of other establishments**. While these establishments are less likely to deal in sculpture,[78] they are more exclusively focused on the sale of art (90% of their sales figures compared to 65% for other establishments), and their sales figures tend to be higher,[79] accounting for 44% of the total sales of artworks by bricks-and-mortar establishments ($28.7 million out of a total of $65.5 million). The study also provides detail on the secondary art market, distinguishing primary sales (66%)

[73] Half (127) are established in the CMA of Montreal, 60 in Quebec City and 90 elsewhere in Quebec. These galleries have existed on average for 14 years. Only 60 or so have been in existence for over 20 years; one-fifth have been in business for less than five years; and over half (56%) for 10 years or less. Only 46 galleries (17%), generally in the Montreal region, have sales of $500,000 or more, with average operations a little over $1 million. At the other extreme, four out of 10 galleries have sales of less than $75,000, with a significantly lower average ($27,330) and a shorter average lifespan (12 years).

[74] Sales to individuals represent 67% of revenues, followed by sales to businesses (28%, twice what the TCI Management study showed). Sales to institutions represent only 4% of revenues, in keeping with the TCI findings. As another study (Routhier) showed, museum spending is not only restricted (donations top the list) but museum purchases are largely directly from artists.

[75] The works of artists living in Quebec represents two-thirds (65%) of sales ($42.3 million), the works of artists living elsewhere in Canada represents 17% and the work of foreign artists, 19%. The percentage of Canadian artists, including Quebeckers, is thus fairly close, at 82%, to TCI numbers (87%). Retailers with higher sales also notably sell more non-Canadian art (25%), while smaller operations focus almost exclusively on Quebec artists (94% among the smallest retailers, to 90% for intermediate-size businesses).

[76] Painting represents 69% of sales ($45.4 million), sculpture 14% and works on paper 2%. Crafts (2%) and other unspecified practices (2%) account only for marginal proportions. It is impossible to assess the number of works sold per discipline independently of the overall value, although such data would have benefited works on paper (photographs, prints, etchings, etc.), which tend to be less expensive but are likely more numerous.

[77] Only one-third (92) focus primarily on sales of original art, while this is not the primary activity for another third, accounting for less than 50% of their revenues. Related activities are numerous and diverse. The study noted approximately a dozen activities related to the visual arts, and a number of activities not directly related: the most significant were framing (27% of retailers), the sale of reproductions or related products (25%), appraisals (21%) and craft sales (19%).

[78] Six percent of sales compared to 20% for others.

[79] A median of $86,113 compared to $55,662 for others.

from resales (34%, or $22.3 million), and showing considerable secondary sales, in a market that remains essentially the purview of middle- or high-income dealers, and in which there is no variation based on whether art dealers' artists have work in museums.

Foreign and Global Trade

Two other studies provide information on the situation of contemporary art galleries in regard to international trade. A survey by Compas for Canadian Heritage (2007) dealt with the export practices of a sampling of private Canadian galleries. Another, similar study, carried out by two sociologists (Fournier and R.-Valex 2001 and 2002) for the *Ministère de la culture, des communications et de la condition féminine du Québec* (MCCCF), looked at the international strategies of Quebec galleries in regard to the major contemporary art fairs.

The first study surveyed 112 private art galleries across Canada, with an estimated response rate of 58.3%. The available document unfortunately provides no sample-selection criteria. The firm justified the relatively small number of galleries contacted by citing an estimate of the total number of galleries, which it pegs at 192, a significant variance from the StatsCan number of 1,267 for that year; nor are respondents' precise sales volumes known, due to a higher non-response rate for this question (44%).[80] Despite these shortcomings, the sample is fairly representative of the contemporary art sector: two-thirds of respondents are galleries specializing in Canadian art,[81] and 12% specialize exclusively in international contemporary art, which means that nearly eight out of 10 galleries (79%) operate in the contemporary art market. The other galleries deal in Canadian art, in ancient art, and in indigenous art. Nearly nine out of 10 of the galleries surveyed (88%) operate in some aspect of the Canadian market.

Among respondents, almost all the galleries deal in traditional artistic media (painting, drawing, sculpture, printing); photography also accounts for a significant 71%; and other, less traditional media are also sold, including installation art (37%), digital art (31%) and video (25%). Interna-

[80] Based on the responses obtained, the firm estimates average annual revenues at nearly $1 million (denoting significant players in this market).

[81] The proportion of revenue from the sale of this type of work based on the entire sample is approximately the same (64%).

tional clienteles represent over one-quarter of sales (28%), with transactions taking place both in Canada (12%) and abroad (16%); a portion of these transactions takes place during international fairs held in Canada (2%) and elsewhere (3%). Respondents showed a high interest (4.6 on a scale of one to five) in international activities, market access to which is limited by the cost of participating in international fairs and other international business events, and by promotional costs. Among other constraints, respondents mentioned the lack of a strong Canadian brand, as well as shipping costs and lack of information on government support. While 40% of respondents had never participated in a fair, and while, of those who had, few had made sales, these events are nonetheless considered extremely efficient international marketing tools; the Internet, already used by more or less all respondents, was mentioned as the second most important marketing tool. Respondents also suggested that an increase in the number of exhibitions of Canadian art in foreign museums was the best way to increase exports, far ahead of participation in international fairs (4/5); other suggestions ranged from improving relationships within the professional network (dealers, collectors, museums, Canadian and foreign curators) and improving institutional government support, to conducting audience needs assessments (the lowest suggestion on the list).

Paintings are the top product for export, mentioned by 61% of galleries, ahead of sculptures (15%) and photographs (8%). Even galleries specializing in exports of paintings, however, also sell many other products: over one-quarter of their exports (26%) have no connection to painting. The United States is perceived as the best export market, especially the north-eastern United States. A fraction of galleries, mainly in Ontario and in Quebec, have as their primary export market a country other then the United States; Western European countries, mainly the United Kingdom, are of considerable interest, while there is fairly little interest in Asian markets (Japan, etc.). The study also emphasizes the marketing needs of galleries, which prioritize websites (63%), invitations (52%) and artist books and catalogues (43%). Fifteen per cent of gallery budgets were allocated to international trade; although one-third of galleries do not invest in international trade, others invest up to 80% of their overall budgets.

The Fournier and R.-Valex study analyzes the participation of Quebec and especially of Montreal galleries at international contemporary art fairs, and situates this participation in the context of gallery directors' other international activities or strategies, while highlighting the interplay between the international networks of public cultural institutions and private galleries. In Canada, Fournier and R.-Valex mention the role of the TIAF. The study more broadly speaks to an exploration and a critique of globalization—a relative notion given the largely national or multinational status of the art markets, and the dominance of certain countries, such as the United States and German. How can national or local markets position themselves within the international market? Pointing out the weak international presence of Canadian artists (notably in annual top-100 lists) and in order to more accurately measure the position of Canadians on the global market, the authors suggest other indicators, such as the Canadian presence in museums and at fairs and biennales, exchanges between galleries, and artists' studios abroad. These questions justify the two studies that form the basis of their report: the first, carried out through extensive interviews with the directors of 13 contemporary art galleries, deals with galleries' international strategies, while the second looks at the major fairs.[82]

The first study singles out for-profit contemporary art galleries (and specifically the better-known Montreal galleries) as the subject of the study, distinguishing them from three other types of art galleries: not-for-profit avant-garde or contemporary galleries (artist-run centres and similar), art galleries dealing with more traditional figurative aesthetics, and large multi-generic commercial galleries (which are active and even dominant on the resale market; note that the international activities of these latter establishments has unfortunately not been studied). This first study demonstrates that all contemporary art galleries are involved to some extent in the network of international fairs; while some may ostensibly reject fairs as being too commercial, preferring biennales, even their directors visit fairs regularly. These galleries have until now privileged European fairs but, with low returns, efforts have tended to be redirected towards the United States. Participation in these events is extremely selective, and many galleries, despite perhaps an initial presence, have subsequently been excluded. The second study shows that the turnover of galleries at fairs is very high (from 30% to 40%), and suggests that developing networks of contacts abroad is a time-consuming and fickle affair. Fairs are only one among a range

[82] This second study included fair visits and interviews with organizers, meetings with contemporary art gallery directors in London, Berlin, Paris and New York, discussions with contemporary art experts, website visits and catalogue consultations.

of international-development strategies, and fulfil a networking function, helping artists develop their relationships with professionals and collectors, as well as playing a role in sales.

The second study more specifically hinges on the current international mechanism of art fairs. The two authors propose a classification system based on hierarchical criteria: the number of galleries invited or selected, the number of countries represented, the number of visitors, booth-rental costs, the prices of the works and the calibre of participating artists, and sales figures (this last criterion is extremely vague due low response rates[83]). The study provides data for 2000 (p. 55), listing 23 fairs, and highlighting the six major established fairs, six secondary or emerging fairs (including TIAF), and 11 other fairs with some Canadian participation, which are often more specialized or less international; this table also provides a breakdown per event of the proportion of galleries by country of origin, notably from Canada and the United States, and identifies the participating Canadian galleries. In 2000, only 32 Canadian galleries participated in one of these 23 fairs, and five galleries, four of which were from Toronto, participated actively. Canadian galleries are on par with Belgium, Holland, Brazil, Mexico, Israel, Greece and Bulgaria. The study also mentioned approximately a dozen Canadian artists represented by foreign galleries.

The study emphasized several characteristics inherent to this international art system. Over the course of a year, the fairs are in and of themselves a market. Most invite collectors; only Basel can afford not to invite collectors. Basel is also the most selective fair: in 1998, only 260 out of 700 proposals were accepted. ARCO-Madrid is the least selective, and the busiest.[84] Fairs compete against each other, and their calibre fluctuates widely. A new event can overshadow the success of a more established fair in the same region (p. 53). Despite the polarization of art and commerce, the fairs showcase a variety of genres (the study also looks at photography, video and digital art in a market dominated until recently by painting) and are closely connected to the network of biennales, particularly in launching emerging artists. International art fairs also play an important role in mediating between the primary and secondary markets, allowing national mar-

[83] In Basel, at the only truly professional fair, approximately 60% of galleries barely cover their costs (Benhamou et al. 2000).

[84] Canada was to be the selected country in 2005; Mexico was chosen instead, for reasons that are unclear. From 2011 onwards, selections will favour cities instead of countries, with Los Angeles being the first.

kets to compete against multinational auction houses such as Christie's or Sotheby's; some resale art dealers also trawl the fair circuit.

The study concludes with an examination of TIAF's strategic role in Canada and in Quebec, and points out the significance of Quebec's participation, especially considering that only four Quebec galleries were represented at the first Toronto event—a presence that, according to the authors, was at the time a condition for survival and for maintaining an aesthetic direction.[85] Quebec's participation at Toronto was significant mostly as a step towards the network of major international fairs, involvement in which generally seems to have a strong national correlation: **events tend to accept a markedly higher percentage of galleries from the country or the region where they are held**. The proximity factor, whether geographical, cultural or institutional, also brings to light the importance of a number of other North-American fairs: the New York Armory Show, the Chicago fair, and the Basel-Miami event, then in its infancy.

4.3 Snapshot

A considerable amount of information is necessary to complete an overview of the Canadian art market and the multiple players involved on multiple levels. Knowledge of the network of commercial galleries and of the primary market has progressed, but the workings of auction houses and of the secondary market remains only vaguely understood. What is the impact of foreign auction houses or of their Canadian subsidiaries on the Canadian market? Compared to the exhaustive knowledge of government and not-for-profit museum spending on purchases and acquisitions, there is a dearth of equivalent data on the major private collectors (businesses, private foundations and individuals). What is the relative portion of foreign acquisitions and purchases by local private collectors? It is crucial to separately assess various suppliers' sales and purchases, and Canadian and foreign suppliers and buyers in order to obtain precise data. How much influence should the resale market be afforded in relation to the primary market in assessing the overall value of the market? Would it be not be pertinent to include tax exemptions for donations in the national tally? Should calculations be based on the figures of bricks-and-mortar dealers,

[85] As the TIAF website indicates, in 2008, 18 Quebec galleries were represented in Toronto, as well as many Quebec art periodicals.

without taking into account the undeniable but undetermined proportion of direct transactions? The role of artists at the core of this underground economy also remains to be defined. As the system's primary supplier-entrepreneur, the artist remains an essential commercial player. Finally, the globalization of cultural goods is increasing the need for more specific information regarding Canadian works and artists abroad, as well as on art dealers. Identifiable and measurable information on Canada's presence in private collections and fairs and at biennales and in major foreign museum collections and exhibits is necessary and, even before that, these strategic dissemination events and spaces must be mapped.

Despite an increasing understanding of the Canadian gallery network, that profile too remains incomplete. Sales figures would be pertinently complemented by data on the longevity of galleries. As with artists, the economic success of galleries is not the only factor that determines stability and sustainability, and smaller galleries can play a more significant role in the long term than bigger operations. It would be relevant to track the turnover of galleries, and to identify those with a long-term impact that are also a part of major professional networks. A clearer understanding of the various sub-sectors of the gallery market would provide a clearer picture of what is likely not one monolithic market, but a series of more or less connected smaller markets. Identifying galleries representing artists with work in museums is one possible starting point, though of course this approach could be further refined. What is the most relevant factor in the gallery market spectrum: the size of the galleries and their longevity, or the aesthetics of the works (ancient/contemporary, Canadian/foreign, etc.), of their clienteles (individuals, corporations, museums) or of the establishments themselves (contemporary art, figurative, multigeneric)? All three types of criteria could in fact be taken into account. The only exploration of these questions to date in Canada, to our knowledge, is a sociological study for the former *Ministère des Affaires culturelles du Québec* (Couture et al. 1984)[86]; the unpublished study is already outdated, but offers a detailed analysis of the different sectors of the art market in Quebec in the late 1970s, isolating the contemporary market from ancient and figurative art, as well as from the vast popular art market which is firmly commercial and very prosperous, and operates internationally through franchises in large commercial spaces. The authors of that thirty-year-old study underscore this

[86] In regard to Canada, the even earlier E.R.A. Consulting Economists study for Communication Canada (1978), which we have been unable to locate, is also worth mentioning.

market's principle of authenticity and originality, and its possible commercial appropriation. What is the current state of this market? If it still exists, should it be included in the national tally?

A complete profile of the visual arts market should ideally encompass commercial and non-commercial, direct and indirect players, take into account both supply and demand, and consider the interactions between the primary and secondary markets, and of the different segments of the current art market. Rather than including all the aforementioned parameters, the most organic approach, and perhaps also the easiest, has been to position research from the point of view of one particular type of art dealer—bricks-and-mortar galleries selling to the ultimate consumer—which not only fuses primary and resale markets, but also tends to overlook the numerous others who fall into the rubrics of buyers and suppliers. A complete profile of the commercial situation of the visual arts would first need to develop a rigorous conceptual framework integrating all these parameters and operators, to identify pertinent data and then interpret that information adequately. Ensuring the availability of data, of course, is another matter altogether; given the number of players to consult, as well as the inevitable restrictions of various industry secrets, obtaining pertinent and long-term recurrent data can be gruelling, and the existing commercial portrait of visual arts world, relying on information that is rarely recurrent, remains approximate and uncertain, ultimately providing us with mere outlines.

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CHAPTER 5

PROFESSIONAL ASSOCIATIONS: PRACTICE AND COMMUNITY LIFE

5.1 Chapter Overview

A final factor in the structure and the divisions that emerged in visual arts throughout the contemporary period is the organization of professional groups and their mobilization around issues related to the promotion of the visual arts. The comprehensive history of these associations, their dates and key moments, remains to be written. The range of possible organizations includes professional organizations (of artists, art dealers, art teachers, museum directors/curators, artist-run centres, etc.), sectoral groups (such as the Alliance), peer academies (such as the Royal Canadian Academy), aesthetic schools or movements (a figurative painters' association, for instance, or the Vancouver, Toronto or Montreal schools) or else interprofessional coalitions through which the visual art sector is represented to various degrees (in Canada, the Canadian Conference of the Arts or the Coalition for Cultural Diversity; in Quebec, the *Mouvement pour les arts et les lettres*).

Professional artists' groups, by their number and their diversity, make up the core of this associative or community life. Over the last decades, association models have expanded from trade guilds, peer academies and aesthetic movements to include sectoral visual arts representation: groups organized on an individual basis (such as Quebec's RAAV or the Canadian CARFAC), a collective basis (such as the various provincial artist-run centres' organizations, or ARCA at a Canadian level), or based on ethno-linguistic criteria, such as the *Association des groupes en arts visuels francophones* (AGAVF). These professional groups underscore the artist-oriented or artist-based nature of this professional ecosystem, and no other art form has such a variety of associations. There is an association for museum directors (CAMDO), for art gallery educators (CAGE), for art dealers (ADAC), for arts administration teachers (CAAAE), and for aboriginal curators (Aboriginal Curatorial Collective), but no comparable body for independent curators, for art critics or for art professors. These latter categories tend to be absorbed into larger associations, often based on employment: museum associations (for curators), artist-run centres (for administrators and critics), schools, colleges or universities (for instructors).[87] Many aspects of the sector's professional organizations also fly under the radar for lack of appropriate forums or spokespersons.

These organizations are nationally, provincially or municipally representative, and sometimes even defined by neighbourhood. The history of these associations remains, as has been said, to be written; their geography likewise remains to be mapped, as does the territory the associations cover. In our electronic, global, de-territorialized era, geography is still a determining factor, which reveals the importance of relationships and of the proximity of support networks. Even an artist working internationally acts locally, and the international art scene is rooted less in the United States, in England, in France, in Germany, than in New York, London, Paris and Berlin, and even within very specific neighbourhoods in these cities. The working conditions of artists and other arts professionals tend to be defined locally, or "glocally," to borrow the term minted by recent globalization theorists.

The Professionalization of the Arts and the Status of Artists

The emergence of professional associations specifically dedicated to defending the rights and interest of visual artists is part of the broader professionalization of arts practices and professions, which in turn is related to the development of professionally accredited training programs and assistance programs for artistic creation. The growth of artists' associations also raises questions regarding membership criteria: while the artist is at the core of the professional apparatus of the visual arts, like a doctor or a lawyer in health or in law, visual artists as a professional group are very different from "real" professions. Contrary to medicine or law, for instance, there are no formal barriers: a diploma in the visual arts is neither a sufficient guarantee of ability, nor a necessary prerequisite for practice. Unlike more conventional professions, there is no official membership list allowing a comprehensive enumeration. This fluidity does not denote the absence of any qualification structure, but rather that qualifications are more often revealed at the apex of a

[87] There are many associations linked to arts education: the Canadian Society of Education Through Art (for primary and secondary school teachers), the Universities Art Association of Canada (UAAC/AAUC), and the University and College Art Gallery Association of Canada (UCAGAC). Unless otherwise indicated, however, these tend to be forums for discussion rather than properly professional associations.

career, or at least at the point of exhibition or marketing, than at the outset; artists generally discover and hone their qualifications as their careers evolve. The professional situation of an artist in this regard is more closely aligned to that of a micro-businessperson. A self-employed person manages a micro-business (in this case, a studio) and provides products, either as goods (artworks) or services (exhibitions, in a museum or elsewhere) to other suppliers, both private (galleries) or public (museums and exhibition centres), or directly to consumers. In this type of professional system, there no longer any formal subordinate employer/employee relationships: the artist is his or her own boss, and works with various clienteles or partners that will facilitate the dissemination and appreciation of the product.

The extremely specific nature of the products and practice of the visual arts raises questions about professional arts organizations. Artists are at once allies and competitors in the same market; how can they be formally associated? To what extent should professional criteria be formalized? On what basis can the title of artist be conferred? Artists' associations include several organizational models, none of which is unanimous: the professional association (as in medicine, law, architecture, or engineering), the more industrial-style union (itself a product of the craft guild system), the peer academy and invisible college (based on the scientific model),[88] and even the entrepreneurs-manufacturers' association. Any of these entails the tensions typical of associations, since the professional milieu is shared by various peer groups founded on shared aesthetics or a shared artistic project, and by institutional associations.

The working conditions of artists offer one lens for looking at the professional ecosystem of the visual arts. The past decades have seen almost uninterrupted efforts to increase the professional status of artists. Even as early as the Second World War, this mobilization was at the root of the creation of the Canada Council for the Arts. The network of artist-run centres has also come from this same impulse to create independent artist-run production and exhibition spaces, which have also resulted in opportunities for professional development and partnership and helped foster and integrate younger generations into the art world. These galleries have been developed parallel not only to the network of public museums and commercial galleries, but also to institutional training programs and to the apparatus of professional membership. More recently, this

[88] On the idea of an "invisible college," see Diana Crane, 1971.

mobilization has also led to the enactment of laws aiming to reinforce and protect the professional rights of artists, first in 1988, in Quebec, and in Canada in 1992. Similar processes were subsequently undertaken in other provinces (Ontario, British Columbia, Manitoba, Nova Scotia, Newfoundland and Labrador); a Saskatchewan law was enacted in 2002.[89] These regulatory efforts, which cover all artistic disciplines and sectors, are extremely uneven across the country, and have led mainly to the governmental recognition of a number of sectoral organizations tasked with representing the entirety of a given sector. Sometimes considered insubstantial and poorly adapted to the specific needs of visual artists, these regulations are part of more general labour-code and employer/employee relations reforms, and affect the negotiations and social safety nets of all artists. This recent system was derived from the previously existing performing arts and media model, and was innovative only with regard to its extension to the new sectors of literature, fine crafts and visual arts. Legislative developments have had the greatest impact on performing and audiovisual artists; by comparison, the copyright regulations that most affect visual artists have not undergone such extensive changes. Note that, unlike labour laws, copyright remains exclusively a federal jurisdiction, and is the domain not of a cultural department such as Canadian Heritage, but of Industry Canada, an economically focused department.

Whatever its restrictions or flaws, the organization of artists has nonetheless led to a deeper understanding of their socioeconomic situation. Since the 1970s, much research, including several recent studies that fall into three principal categories, has fleshed out the profile of this group of workers.

[89] On the situation in Canada and in the provinces, see Neil Craig Associates (2007). On the situation in Quebec, see MCCCF (March 2008, July 2008, October 2006, July 2005, April 2004, June 2004); for Ontario, see the Minister's Advisory Council for Arts and Culture, October (2006) and for Saskatchewan, the Saskatchewan's Minister's Advisory Committee/Neil Craig Associates (June 2005). For a critical evaluation of these regulations in Canada and in Quebec, including their actual impact on artists, see Cliche 1996. For a recent government evaluation of the scope of this regulation in Canada, see the Canadian Artists and Producers Professional Relations Tribunal (2008); in Quebec, see MCCCF/L'Allier 2010. On challenges in Quebec see also MCCCF/Leger marketing (March 2007) and MCCCF/Jutras (1996). On the general significance of this new labour-relations framework see Laplante 1999. On legal issues and contracts in the visual arts in Quebec, see Azarria and Tamaro (2001).

Three Research Directions

The first type of research is on a macro scale: studies that aim to identify the socioeconomic and socioprofessional characteristics of the entirety of the professional group on a national or provincial scale. Recurrent Statistics Canada Census data on the category of "Painters, Sculptors and Other Visual Artists," for instance, have helped confer on artists a systemic occupational legitimacy, while other, ad hoc university studies have allowed us to deepen the group profile. The two most recent macro studies (Bellavance, Bernier and Laplante 2005; Maranda 2009) have the notable advantage of identifying the portion of income derived directly from artistic practices, which Statistics Canada data are not broken down.

A second type of study explores the particular situation of sub-groups: women, artists of colour, immigrants, seniors, and emerging artists. This sort of research explores broad social themes (immigration, gender, ethnicity, aging, youth) rather than reflecting on the conditions common to the professional practice of the visual arts.[90]

Finally, a third type of study deals more specifically with the geographical situation of visual artists. Often ethnographic, these studies take a microscopic perspective, often focusing on older central neighbourhoods in major urban centres, or on small rural areas, on the place or the location of artists in a specific territory, on the role of artists in urban or rural gentrification, or of reclaimed abandoned industrial or other deteriorating spaces.[91]

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[90] On the situation for senior artists, see HSR (February 2009 b and c); on emerging artists, see Andrews 2008, and Alberta Human Resource 2003; on women artists, see MCCCF/Massé and Jobin 1998; on women artists of colour see Sethi 2002; on immigrant artists see Bellavance 2000.

[91] Regarding gentrification, see Bain's series of ethnographic studies on the construction of the professional identity of Toronto artists in regard to the location of their studios in certain central neighbourhoods (Bain 2007, 2006, 2005, 2004 a and b, 2003); Mathews (2008) on artists' perception of gentrification in Yorkville; the canonical work of Ley (2003) on the role of artists in the gentrification of central neighbourhoods in Montreal, Toronto and Vancouver; a case study of the typical gentrification or artistic transformation of the Vineberg building in Montreal (Rodriguez 1999); our own study on the location of artist studios and workshops in Montreal (Bellavance and Latouche 2008, Bellavance, Latouche and Vachon 2005); and Tremblay and Pilati (2008) on the role of artist-run centres in Montreal's urban economy. The situation of artists in rural areas has also recently been analyzed by a team of independent researchers based on 1991 to 2001 Census data (Bunting and Mitchell 2001) and followed by a specific study on visual artists in rural communities in southern Ontario (Mitchell et al. 2004). Marontate (2002) on contemporary artists in a peripheral Atlantic region is also worth mentioning.

We have far less precise data on other categories of self-employed workers in the visual arts: art critics, independent curators, exhibition centre coordinators, directors of arts periodical, etc. Efforts have been made since the late 1990s to document the working conditions in artist-run centres, where many employees are not themselves artists;[92] the working conditions of other self-employed cultural workers is likely fairly closely aligned with the working conditions of artists themselves, though this remains to be confirmed.

5.2 Available Data

Given our own research mandate and the breadth of the documentation on the living and working conditions of artists, this section will primarily synthesize results from the first, macro, research category. The overall income of artists can be estimated and the percentage of incomes derived from artistic practice isolated in the studies in question. The research hints at the complexity of personal and artistic income, which can include self-employment income as well as salaries, and professional earnings as well as art-related and unrelated income. These studies also conduct to consider not only personal declared revenue, but also the entirety of an artist’s income, both declared and undeclared, such as contributions from other individuals (partners, parents, friends), which could well play a significant role in facilitating professional artistic careers; in regard to this latter question, total household income is a useful but neglected indicator. Research by Maranda (2009) and by Bellavance et al. (2005) focus on the diversity of skills on which artists regularly rely, and highlights artists’ typical multidisciplinarity rather than taking a more strictly disciplinary approach.

This kind of broader research approach also highlights five general traits of artists compared to other professional groups: 1) the predominance of self-employment (as opposed to salaried employment); 2) multiple jobholding (rather than one job); 3) a project-based work structure (as opposed to corporate or organizational employment); 4) ongoing professional development (as opposed to terminal academic education); and 5) the significance of notoriety in professional success. The wider implications are worth noting as well: insofar as these characteristics are in-

[92] Regarding Canada, see the recent contribution of Gauthier (2010) for ARCA and IMAA. For Quebec, see CQRHC/RCAAQ (October 2000 and March 1999) as well as RCAAQ (May 2006).

creasingly typical for a number of individuals and professions, an examination of the living and working conditions of artists could provide insight into the overall evolution of the workforce, towards a greater flexibility that is paradoxically also associated with greater insecurity, leading to the emergence of "flexicurity" as a new research issue.[93]

Statistics Canada Data

The representation of visual artists as a professional group was a direct consequence of the five-year Census profiles circulated by Statistics Canada since 1970. The reorganization of the professional classification systems at the end of the 1970s has traced the demographic and socioeconomic evolution since then of a series of visual arts sub-categories including "Painters, sculptors and other visual artists"[94] nationally, provincially and even by Census Metropolitan Areas (CMAs). There are several methodological limitations to the interpretation of this information: the appurtenance criteria for this category are not very strict, which can artificially inflate the population of professional artists[95]; conversely, the multiple jobholding by visual artists is systematically overlooked by Statistics Canada, and enumeration based on time-dominant employment in the week preceding the Census can underestimate the size of the group (consider, for instance, the exclusion of secondary-school art teachers, many of whom are professional artists). The combination of these two factors can decrease the group's income: non-restrictive criteria for professional status increase the number of lower-income professionals, while untracked multiple employment may exclude the wealthiest, or the least poor. Income statistics furthermore include total salaries and net self-employment income (after professional expenses) and exclude other sources such as income from government programs (grants, employment insurance), pension earnings, and investments. This method does not determine the specific portion of income

[93] See CCA/Gollmitzer and Murray (2009).

[94] This group includes "Painters, sculptors and other visual artists [who] create original paintings, drawings, sculptures, engravings and other artistic works. They are usually self-employed. This group also includes art instructors and teachers, who are usually employed by art schools, but excludes college and university instructors." Thus, "Art teachers in primary, secondary or post-secondary institutions are classified in an appropriate unit group of major group E1 – Teachers and Professors." This group excludes house painters, painters and decorators, artisans and graphic designers and illustrators.

[95] A person who was either employed or unemployed during the reference week (Sunday to Saturday) prior to Census Day and who worked for pay or in self-employment since January 1 of the Census year, and who identifies as a visual artist, can be included in this category.

derived from artistic practice, and the subtraction of professional self-employment expenses can decrease total personal income. Based only on personal income before expenses, the socioeconomic status of the artist can seem to be unduly negative. Taking into account household income is one possible solution in cases where a higher-earning domestic partner contributes to the career of the artist-spouse. The cumulative effect of these factors cans significant skew the true socioeconomic profile of visual artists.

Whatever the methodological flaws, there is a demographic and socioeconomic portrait emerging. Demographically, in Canada in 1971 only 2,315 artists were enumerated (including 755 in Quebec and 870 in Ontario).[96] In 1981, the size of this demographic increased to 7,955, of whom 2,005 lived in Quebec and 3,010 in Ontario, a growth rate unseen since then (244%, compared to 38% for the population in general over the same period). From then on, the group has been growing constantly, albeit less dramatically: to 10,990 in 1991, 15,250 in 2001 and 17,115 in 2006.[97] This works out to less than in the 1980s and 1990s (38% and 39% respectively), but is greater than the general population (20% and 10%). Since 2001, the 12% growth rate has corresponded to that of the general population.

In terms of income, numbers seem to have dropped significantly since 1990—approximately 33%, according to HSR (2009, p. 36)—in particular compared to the general increase in average income (9%). In 2005, the income of visual artists was, along with the income of dancers, among the lowest of the nine artistic professions studied ($13,167 compared to $22,731). This is significantly lower than the overall income of cultural workers ($32,856) and of the general population ($36,301). The median income of $8,000, lower still, suggests a major disparity within this population: a smaller number of artists with higher incomes inflate the group's average income. The statistics have been the same from one Census to another since the early 1980s: among all artists, visual artists are financially the worst off.

[96] See Bellavance (1992).
[97] See Hill Strategy Research (February 2009) p. 32.

StatsCan data from the early 1970s, which we have compiled ourselves,[98] furthermore indicate a significant feminization of the group since then: mostly comprised of men in the early 1970s (66%), by the mid-2000s it was mostly female (56%). This reversal can also have had an impact on decreased incomes: women on the whole earn less than their male counterparts—28% less in the general population, and an even more disparate 34% among visual artists. Finally, the group is older on average than most of the other artistic and cultural professions identified by StatsCan.

Two In-Depth Ad Hoc Studies

Several quantitative ad hoc studies have sought to further investigate professional visual artists in Canada. There has been research carried out fairly consistently since the early 1970s, with varied sampling methods;[99] the most recent are the 2009 Maranda on income from visual arts practice in Canada in 2007, and our own study on working conditions for Quebec visual artists (Bellavance et al. 2001, revised in 2005). While we employed different methodologies, these two studies provide a body of data on the socioeconomic condition of artists, their standards of living, and their career trajectories that is more valuable that Census data. Both studies in fact attempt to solve the problem presented by the Canadian Census; both specify the proportion of income derived from artistic practice of visual arts; and both explore the complexity of artists' sources of income, from artistic income, non-art-related employment or business income, and social transfers and pension revenue. Both studies also examine the nature of artistic practice in relation to various visual arts disciplines. Their often overlapping results are worth a second look.

The two studies employ different methodologies. Our own investigation was carried out by mail between September 15 and October 30, 2000, with 3,207 artists surveyed after the nine lists of

[98] See Bellavance (1992).

[99] In Canada, there were studies by Communications Canada/Bradley 1978 and, more recently, Statistics Canada/Pina la Novara in 1997. The earliest we found dates back to 1974 and concerns visual artists in the CMA of Montreal (MACQ/Garon 1974). More recently, in Quebec, Jalbert 1986, Lacroix and Bouffard 1995 a and b are noteworthy. As well, in Quebec, the main funding bodies have conducted a number of socioeconomic studies of their clientele (grant recipients) as mentioned in chapter two.

the professionally recognized cultural organizations and associations were merged.[100] The study took into account the entirety of this reference population, of which all the members were consulted. Among them, 1,212 questionnaires were completed, out of a total of 3,050 valid addresses, for an overall response rate of 39.7%. Because of the lack of reliable lists and contacts, artists working only in the private gallery network were less consistently included. The final sample was ranked in keeping with the response rate per list.[101] Note that the number of individuals surveyed through this method was close to the Statistics Canada numbers for Quebec for the same period (3,385 in 1996 and 3,815 in 2001).

The Maranda study, carried out between July and December 2008, was broken into several phases. Its method, based on Respondent Driven Sampling (RDS), attempted to reconstitute a population representative of an entire category based on a small core group of individuals. The first step was to contact fifty artists as seed representatives of various career stages and geographical areas across Canada through an online survey delivery site (Survey Monkey); these initial respondents were then asked to indicate six other respondents, and so forth. The first sample gathered 3,706 valid email addresses and 1,229 completed questionnaires, for a 33% response rate. The questionnaire addressed to this first group dealt only with sociodemographics. A second questionnaire on the economic aspects of artistic practice was then administered to the sub-sample derived from the primary sample (n=769), completed by 565 individuals for a response rate of 46%.[102] Assuming that Census data underestimate by half the actual number of artists, the study established the reference population at approximately 32,000 artists, with confidence intervals for the first and second surveys of +/- 3.96 and +/- 5.83 respectively.

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[100] These lists were merged gradually to eliminate duplicate entries while maintaining individual list inclusions. These lists are derived from a variety of sources: the *Regroupement des artistes en arts visuels du Québec* (1,564 artists), the *Conseil des arts et des lettres du Québec* (937), the *Conseil des arts textiles du Québec* (38), the *Conseil de la sculpture du Québec* (167), the *Conseil québécois de l'estampe* (155), the *Association des illustrateurs et des illustratrices du Québec* (133), the *Collection Prêt d'œuvres d'art* of the *Musée du Québec* (209), the *Politique d'intégration des arts à l'architecture* – MCCCF (155), and private galleries (48). Because some artists appear on more than one list, the total number of occurrences (3,454) is necessarily greater than the accurate size of the population after the elimination of duplicates (3,207). This in no way alters the probabilistic nature of the sampling.

[101] For a detailed methodological description, see p. 161 – 170.

[102] Respondents who only partially completed the questionnaire or who had withdrawn at the second step were excluded from the sample.

Quebec Artists: Demographic and Socio-Economic Profile

The Quebec study reveals that over one-quarter of respondents (27.1%) live in the central areas of Montreal,[103] that nearly half (46.5%) live on the island of Montreal, and that almost two-thirds live in the greater Montreal region.[104] This population is relatively old (47 years on average), includes more women (58%) and is largely francophone (93.2%). More than one artist out of five (7%) were born elsewhere in Canada, and even more (14%) were born outside of Canada. While most artists (62.5%) have a spouse, there are relatively few couples with children (27%), and single-person households (where the individual does not live with anyone else, whether a partner, children or other) are almost as numerous (25.5%). Spouses, when present, are often also connected to the arts and culture—this is true for four out of 10 artists who have a spouse, and 12% are themselves visual artists. It is also worth noting that approximately half of spouses (49.2%) are full-time salaried employees. An analysis of total gross personal income (before subtracting professional expenses) indicates for 1999 an average income of $25,488 (Table 7).[105]

Table 7:
Income of Visual Artists in Quebec, 1999

Total Average Gross Income	$25,488
Total Median Gross Income	$19,000
Number of Respondents	2,616
Average Art Revenue	$11,032
Median Art Revenue	$3,500
Number of Respondents	2,517
Average Practice-Related Expenses	$7,868
Median Practice-Related Expenses	$4,200
Number of Respondents	2,623
Average Artistic Income	$3,164
Median Artistic Income	($700)
Total Average Net Income	$17,620

Source: Bellavance, Bernier and Laplante (2005). **Special processing by INRS.**

This number is obviously higher than Statistics Canada data, whose analysis only concerns total net income. After professional expenses, the numbers are closer to Statistics Canada data, but

[103] The H2 postal code.
[104] Includes the adjacent administrative regions of Laval, the Montérégie, the Laurentians and Lanaudière.
[105] Non-response rate: 18% or less.

remains slightly higher: the average total net income is approximately $17,620. An assessment of the median total gross income indicates that half of this population earns $19,000 or less. This median, significantly lower than the average, reveals major disparities in personal income: a number of artists with higher income considerably skew the group average.

An analysis of the categories of total gross income (Table 8) reveals a pyramid structure: at the base of the pyramid, there is a majority of artists who earn less then $20,000; the second income category, which includes slightly less than one-quarter of all artists (23%), ranges from $20,000 to $33,000; a third group, which accounts for 16% of artists, ranges from $33,000 to less than $52,000; and finally, at the tip of the pyramid, slightly more than 10% of artists declare personal incomes of at least $52,000. These numbers obviously do not include professional expenses, which can be extremely high. These figures also covers only one year, and thus do not take into account the significant fluctuations from one year to the next, which can early lower or promote an individual from one category to another. This pyramid nonetheless provides a structural profile of this particular category of cultural workers, at least based on the series of surveys carried out in Quebec in the cultural sector over more than 20 years.

Table 8:
Total Gross Income, Visual Artists, Quebec, 1999

Income Ranges	**#**	**%**
Less than $20,000	1343	51.3
From $20,000 to $32,999	595	22.7
From $33,000 to $51,999	407	15.5
At least $52,000	275	10.5
Total	2620	100

As Table 7 indicated, the revenues directly derived from artistic practice[106] represent less than half of gross personal income: $11,032 on average. In fact, as the much lower median indicates, half of artists only make $3,500 or less from their professional activities. After professional expenses ($7,868 on average, with a median of $4,200) the average artistic income drops to $3,164. As the median income after professional expenses indicates, half of artists run a deficit of at least $700 in regard specifically to their artistic practice. In 1999, one out of every five Quebec artists (21.7%) had no income from their professional practice, and nearly six out of every 10 (58.3%) saw less than 20% of their income derive from their artistic practice (Table 9). By contrast, only one artist out of four made at least half of their income from their artistic practice, and less than 10% (8.4%) made their living from their art (albeit not necessarily a great living).

Table 9:
Percentage of 1999 Income Derived from Visual Arts Practice, Quebec Artists

		0%	1% – 9%	10% – 19%	20% – 49%	50% – 99%	100%	Total
Visual Art Practice	**#**	546	524	393	397	441	211	2,511
	%	2.7	20.9	15.7	15.8	17.5	8.4	100
Percentages are calculated by the source(s).								

Income directly derived from artistic practice makes a slim contribution to the overall, fairly low, revenue across the sector. As Table 10 shows, one out of every four artists makes less than $1,000 from artistic practice, and barely one out of every three earns at least $10,000. In 1999, over 10% of artists derived at least $30,000 from their artistic practice, which means that barely over 300 individuals lived well from their art in Quebec that year. The study also showed that more than half of artists reinvested at least half of their gross income back into their art. More startling still, nearly one out of every 10 artists declared professional artistic expenses that exceeded their total income from all sources. This latter statement corroborates the existence of support from other sources, including spousal or familial patronage. While it is impossible to measure this hidden income, household income clearly should be taken into account.

[106] Includes sales, rentals and other art-related commercial activities, to artists' fees and royalties, as well as public funding and private contributions; does not include teaching or other visual art-related activities (jury and assessment committee honoraria, visual arts organization management, curating, artistic activities in a sector other than the visual arts).

Table 10:
Visual Art Revenue, Quebec Artists, 1999

	#	%
None	310	12.3
From $1 to $999	310	12.3
From $1,000 $ to $3,499	629	24.9
From $3,500 $ to $9 999	516	20.5
From $10,000 $ to $19 999	356	14.1
From $20,000 $ to $29,999	158	6.3
At least $30,000	242	9.6
Total	2521	100

Incomes are more or less comparable from one region to another. Total gross income and practice income are only slightly higher in large urban centres, in Montreal ($25,817 and $11,391) and higher still in Quebec City ($27,306 and $12,545). However, although total income and artistic income appear to be higher in Quebec City, and to a lesser extent in Montreal, professional costs are also higher in those areas. The difference between artistic income and professional expenses shows that net income is lowest in areas where incomes before expenses are highest: the overall net revenues of $3,164 for visual artists in general drops to $3,056 in Montreal and to $2,203 in Quebec City, compared to $4,103 in the regions surrounding Montreal, and up to $11,106 outside Quebec; these numbers suggest that it is not financially profitable to work in Quebec's major urban centres.

An analysis of the fiscal and entrepreneurial status of artists also clarifies the characteristics of freelancers in the visual arts. The study showed that a little over half of artists (53%) identify as entirely self-employed. In fact, eight out of 10 artists are truly freelancers in one sense or another, since 20% of them combine self-employment with salaried work. This information can also seem relatively high because of Canadian and Quebec regulations on the status of artists, which recognize the fiscally autonomous status of self-employed for artists. A minority of artists (15.7%) also work in a more elaborate entrepreneurial context, either in an incorporated business (6.8%), as companies (5.5%) or regularly employing others (3.4%). Artists who practice public art are the most likely to be in these situations. They are also more frequently self-employed, either fully or in combination with a salaried position.

Multiple Jobholding and Income Diversification

The analysis of the characteristics of multiple jobholding by artists took into account the variety of sources of income and those jobs related and unrelated to artistic practice, and provided information on the increasingly broad if not outright extinct categories of art practices in this era of pluri-, multi- or post-disciplinarity.

An analysis of the different combinations of sources of income was beyond the scope of this study, and remains to be carried out. But even a simple examination of the data leads to several unarguable conclusions, foremost among them the extreme income diversification. The sale or rental of works, which is the most frequently mentioned source of income, only contributes to total revenue for slightly more than half of artists (52.2%). No other source of income affects a large percentage of artists. Exhibition rights make up the second most frequent source (27%); teaching visual arts in an accredited program and financial support from public bodies make up 18% of artists' income; and non-art-related employment income accounts for 17% in the case of other self-employment income, and 16% for salaried income. No other source of income mentioned concerns more than 10% of artists. This income diversity does not mean that artists all have very varied sources of revenue, but rather that most artists likely develop diversified income-combining strategies. The study of these combinations remains an important issue: it would no doubt allow the extrapolation of the strategies developed by artists to other models or career profiles.[107]

An assessment of the three most financially significant sources suggests that few sources of revenue are important for a large number of artists. The most important source of revenue for the greatest number of artists remains the sale or rental of works, which was mentioned one time out of two (49.7%). Teaching visual arts in accredited programs (19%), commercial activities other

[107] The analysis revealed significant variation in the age of the participants and the disciplines practiced. Sales and rentals were much more common for painting, etching and design, and less so for video, installation and performance art, for which media they were often second to exhibition rights and public funding.

than the sale of works (18%), exhibition rights (17%), various non-art-related salaries (16%) and financial support from public bodies (16%) also contribute more or less significantly to overall income. Note that exhibition rights, frequently mentioned as a source of income (27%) contribute much less to the value of the overall revenue: only 17% mention exhibition rights as one of their three most important sources.

A proportional analysis of income from different sources, meanwhile, demonstrates the importance of non-art-related employment income, both salaried and from self-employment (Table 11). Although less frequently mentioned than art-related income, these other sources nonetheless contribute significantly to the overall income of visual artists as a group: the proportion of those who derive half of their income (25.6%) is practically the same as for practice income (24.6%) and is higher than both teaching income (17%) and art-related income (14%).

Table 11:
Income Diversification, Quebec Visual Artists, 1999

		0%	1% – 9%	10% – 19%	20% – 49%	50% – 99%	100%	Total
Visual Art Practice	**#**	546	524	393	397	441	211	2,511
	%	21.7	20.9	15.7	15.8	17.5	8.4	100
Other Visual Arts Activities	**#**	1,650	178	151	180	300	52	2,511
	%	65.7	7.1	6.0	7.2	11.9	2.1	100
Visual Arts Teaching	**#**	1,715	80	99	183	372	61	2,511
	%	68.3	3.2	4.0	7.3	14.8	2.4	100
Activities Unrelated to the Visual Arts	**#**	1,576	60	104	153	516	102	2,511
	%	62.8	2.4	4.2	6.1	20.5	4.1	100
Private Pension Plan, Rental, Investments, Dividends, etc.	**#**	1,951	140	54	75	239	52	2,511
	%	77.7	5.6	2.1	3.0	9.5	2.1	100
Government Transfers	**#**	2,114	59	42	140	144	13	2,511
	%	84.2	2.4	1.7	5.6	5.7	0.5	100
Percentages are calculated by the source(s).								

The analysis of paraprofessional work—that is, work related to the visual arts—reveals the relative importance of teaching (Table 12). One artist out of two (51%) is considered an instructor in one sense or another, either because they have taught previously (21%) or teach currently (30%).

The proportion of actively teaching artists at the time the study was carried out was lower, but teaching was nonetheless an important source of paraprofessional work, reported by almost one-third of the population, nearly 1,000 individuals surveyed (962). Teaching has a number of different connotations depending on status or position. An analysis of positions occupied by teaching artists at the time of the study showed that more than one artist out of 10 (10.5%) hold a regular position, either at the primary or secondary level (3.7%), at the college level (4.7%), or at the university level (2.1%). Over one-third of teaching artists have a regular position in the Quebec education system. Sessional positions in universities (5.6%) or in college (3.6%) were also relatively important; private lessons (7%), private schools (6.3%), professional development programs (4.2%) and other, unspecified teaching tasks (6.8%) were also mentioned.

Table 12:
Active Artists Teaching Per Teaching Job, Quebec 2000

Teaching Jobs	**Number of Active Artists Teaching (#)**	**Percentage of Active Artists Teaching Per Job Based on Total Artists (%)**
University		
Regular Professor	68	2.1
Instructor	178	5.6
College		
Regular Professor	149	4.7
Other	115	3.6
Primary/Secondary		
Regular Professor	116	3.7
Other	94	3.0
Private		
Private School	199	6.3
Private Lessons	223	7.0
Advanced Training	132	4.2
Other Teaching Duties	215	6.8
Total Number of Respondents	***948***	***3,172***
Percentage of Respondents, All Teaching Positions	***29.9***	***100***

Artists are also engaged in non-pedagogical art-related activities, which contribute less than teaching to the overall income of the group, but are mentioned by more artists: nearly six out of 10 artists have held art-related jobs throughout their career (58.4%), compared to five out of 10 for teaching, and more than one-third (35%) were working in art-related employment at the time the study was carried out, compared to only one-third for teaching. None of the sub-categories of paid art-related employment, however, included very many individuals at the time the study was carried out. Among the eight art-related occupations, commercial work in general was most frequently mentioned,[108] followed by artistic administration or support tasks such as curatorial work and art criticism (3%), organizational management (5%), jury membership or remunerated board membership (6%) and other visual arts support work (13%). Extracurricular instruction occupied one artist out of 10.

Non-art-related employment contributed more significantly to the group's overall income, but was less frequently mentioned than all other categories at the time of the study (21%). Moreover, most of these unrelated jobs (72.4%) seem actually to be related to arts, culture and communications; another 10% is teaching-based. So, unrelated employment was markedly lower than what might have been expected.

Canadian Artists: Demographic and Socio-Economic Profile

The Maranda study raises the challenge of accurately determining the number of professional artists in Canada. The study first sought to establish whether the respondent had identified as a visual artist during the most recent Census. An analysis of these responses raised further questions about the pertinence of Canadian Census estimates—less than half (48%) of respondents recalled identifying as visual artists, over one-quarter (27%) did not recall their response and a significant number reported having been enumerated in another occupation (11%) or simply not having participated (14%). The non-participation rate among artists is relatively high, compared to 4% non-participation for the Canadian population overall, a discrepancy that could be explained by two reasons: many artists live in studios or lofts in buildings overlooked by Census takers; or respondents had simply forgotten that they had been enumerated. Whatever the reason,

[108] This includes commercial photography (6%), commercial design (12%) and similar (12%).

these results undermine the validity of official data. Maranda is of the opinion that Census data favour better-established or better-known artists; by his calculations, the Census only truly enumerates between 65% and 50% of Canadian artists, whose number in 2007 he estimates between 22,455 and 27,782.

A second interesting finding concerns the relationship between age and the start of a career. On average, artists begin their professional careers at approximately 29 years of age, which is consistent from one generation to the next; 80% began their career before the age of 35. Compared to the Canadian workforce as a whole, the number of active artists peaks earlier: while the general labour force generally reaches its peak between 45 and 54 years of age, then rapidly declines, the number of artists peaks between 25 and 34 years, then decreases gradually until 54 years before declining precipitously as well. The number of artists practicing after age 65 is distinctly higher than in the labour force as a whole, whether by artistic commitment or financial necessity. Women are more likely to begin a career after 35.

The study was also innovative in establishing indicators of professional success,[109] which consisted of 22 accomplishments an artist is likely to achieve in the course of a career: for example, public presentations of work in a group exhibition in a smaller gallery applied to 96% of respondents, while presenting work in a major biennale only applied to 10%. Each of the benchmarks was established in regard to the average year in the artist's career that the benchmark was met, ranking each artist by success or recognition.

Both studies also make use of a number of other professional indicators, such as the number of grants obtained, presence outside Canada and exhibitions in artist-run centres (Table 13).

[109] See p. 15 work cited.

Table 13:
Comparison of Selected Professional Indicators of Visual Artists, Maranda (2009), Bellavance et al. (2005)

Indicators	Bellavance et al. (2005) Visual Artists, Quebec 2000	Maranda (2009) Visual Artists, Canada 2007
Grants Received (public or private body, excluding training)	72% 38% CALQ 25% CCA	65%
Foreign Presence		
Events	20% exhibited during an international event outside Canada 22% exhibited in an art museum or equivalent	10.4% presented at an international biennale
Private Galleries	18% exhibited in private galleries outside Canada	14.2% represented by non-Canadian gallery
Solo Exhibition in Artist-run centre	37%	n/a

There was some divergence between the two studies, primarily in regard to sociographics (Table 14), due to either methodological or regional differences, and a point-by-point comparison would be impossible. The main difference between the two studies has to do with the average age of the sample: like the Census, our method perhaps tends to discriminate in favour of older and/or more established artists. Sex proportions and metropolitan concentrations are approximately the same in both studies; it bears mentioning, however, that while the urban population concentration may seem high, it is much lower than in other cultural sectors, notably the performing arts and the media. Household structure is also quite similar: artists are less likely than the general population to be in a domestic partnership, and couples without children are also more likely among artists. Compared to the Canadian population, levels of education seem generally higher; in regard to education, the major difference between the two studies is the probable result of the particularities of the Quebec education system, in which an undergraduate diploma entails two additional years.

Table 14:
Comparison of Selected Demographic Characteristics of Visual Artists, Maranda (2009), Bellavance et al. (2005)

	StatsCan 2006 Labour Force	Bellavance et al. (2005) Visual Artists, Quebec 2000	Maranda (2009) Visual Artists, Canada 2007
Average Age	n/a	47 years of age	43 years of age
% Women	n/a	58.%	57%
Urban Concentration	n/a	46.5% (Island of Montreal)	48.1% (Montreal, Toronto, Vancouver)
Household Structure			
Couples with Children	31%	27%	25%
Couples without Children	26%	36%	35%
One-Person Households	27%	25%	34%
Other	16%	12%	6%
Highest Diploma Achieved	General	Visual Arts	General
Secondary School or less	42.5	22.4	4.5
College	34.6	6	11.4
Undergraduate Degree	16.0	45	39.2
Graduate Degree or Greater	6.9	26.5	44.9

There are several related conclusions to be drawn, notably with regard to socioeconomics (Table 15). Incomes from artistic practice are on average more or less aligned, and the lower median highlights significant discrepancies within the group. After practice-related expenses, in both cases the actual earnings from artistic practice are much lower on average than the income derived from that work. In both cases also average net individual incomes are higher than Statistics Canada data ($13,167). The Maranda study reveals also a much higher median than Statistics Canada ($20,000 vs. $8,000), although those numbers fare no better in comparison to the national Statistics Canada average and median.

Table 15:
Comparison of Selected Economic Characteristics of Visual Artists, Maranda (2009), Bellavance et al. (2005)

	StatsCan 2006 Labour Force	Bellavance et al. (2005) Visual Artists, Quebec 2000	Maranda (2009) Visual Artists, Canada 2007
Total Average Gross Income	n/a	$25,488	n/a
Total Median Gross Income	n/a	$19,000	n/a
Average Practice Income	n/a	$11,032	$13,376
Median Practice Income	n/a	$3,500	$6,000
Average Practice Expenses	n/a	$7,868	$11,944
Median Practice Expenses	n/a	$4,200	$8,000
Average Practice Income	n/a	$3,164	$1,432
Median Practice Income	n/a	($700)	($556)
Total Average Net Income	$36,301	$17,620	$25,318
Total Median Net Income	$26,850	n/a	$20,000

The study also isolates the average portion of income from sales (54%), public or private grants (34%) and artistic honoraria (12%) within gross income, and compares the incomes of artists with gallery representation to those without (see Table 16).

Table 16:
Comparative Incomes of Visual Artists by Gallery Representation, Canada 2007

	Gallery Represented	Unrepresented
Number	221	326
%	40.4	59.6
Average	$21,122	$8,116
Median	$10,000	$4,000
Maximum	$288,453	$64,000
Minimum	$0	$0
Percentage above zero	98.3%	92.7%

Source: Maranda 2009

The study also examines the implications of time allocation. Artists work on average over fifty hours per week (51.3 hrs), of which over half (26 hrs) is devoted to studio time, while more than one-quarter (14.5 hrs) is spent on art-related activities, and another quarter to unrelated work (7.6

hrs) and volunteer work (3.2 hrs). The analysis breaks down income in relation to primary occupation (Table 17).

Table 17:
Income and Time Allocation of Artists by Primary Occupation, Canada 2007

	Primary Occupation		
	Studio Practice	**Art-Related Activity**	**Non-Art-Related Activity**
#	288	195	66
%	52.5	35.5	12.0
Gross Practice Income			
Average	$17,718	$9,761	$6,263
Median	$8,740	$4,104	$3,218
Practice Expenses			
Average	$13,828	$11,080	$6,877
Median	$9,997	$7,000	$3,000
Net Practice Income			
Average	$3,890	($1,319)	($614)
Median	$332	($2,000)	($322)
Net Art-Related Income (Average)	$6,552	$31,298	$4,486
Net Other Income (Average)	$9,335	$4,395	$19,325
Total Net Income			
Average	$19,786	$34,374	$23,196
Median	$15,000	$28,994	$21,793
Hourly Rate	$8.11	$13.46	$9.03

Source: Maranda 2009

A little over half of artists (52.5%) devote the majority of their time to studio practice. Over one-third (35.5%) devote most of their time to art-related work, and a little over 12% to unrelated work. Those who devote most of their time to their practice are economically penalized: while artists who spend more time in the studio have higher gross incomes, their professional expenses tend to cancel out that margin; they also earn far less income from other sources. The total net median income of this group is equal to that of only half of that of artists whose time is primarily spent on art-related activities, and only 75% of the income of artists who primarily engage in non-artistic activities. Based on total net income, their hourly earnings are also the lowest

($8.11), while the hourly earnings of artists who spent most of their time on other art-related activities are higher ($13.46).

The study also looked at the relationship between public support and income. In 2007, 55% of respondents had not received any grants, 22% had received less than $5,000 and 22% had received $5,000 or more. Major-grant holders declare both higher income and higher professional expenses; they also devote more of their time to studio practice. Being a grant recipient, however, does not seem to have a significant impact on an artist's total net income, which fluctuates between a little over $24,000 and $26,000. As the author states, "grants, in essence, buy time and materials for the production of art and not increased living standards as average total income across the three categories is comparable."

The study demonstrates the positive impact of education on total net income: both average and median income increase proportionally to an artist's level of education,[110] and the impact of a master's degree seems especially positive. There is no correlation, however, between the level of education and practice income; in fact, if anything, there is an inverse correlation, with net artistic income decreasing as the level of education increases.

Total income increase proportionally to recognition,[111] as does the proportion of practice and art-related income, while the proportion of unrelated income decreases. The study also shows that over half of artists (53%) do not have (31%) or self-finance (22%) supplementary private health insurance, and that over one-third (36%) have no pension fund.

Multidisciplinarity and Skill Diversification

Each study highlights the importance of artists' multiple and varied skill sets. The Canadian study, which asked respondents to indicate the two most frequently practiced visual-art media, concluded that the question was moot given the extreme diversification of artistic practices (p.

[110] See p. 56. Those with a secondary-school diploma or lower have an average revenue of $17,447, compared to $19,467 for college graduates, $22,114 for those with undergraduate degrees, $30,150 for those with master's degrees and $38,537 for doctoral graduates.
[111] See p. 57.

15); the author then elected to distinguish more generally between four major categories of practice otherwise weighed unevenly: the first was studio-based practice (painting, sculpture, drawing, print media, installation, textiles), which accounted for approximately two-thirds of the sample (64%); the second, new media and film/video, accounted for 22%; the third, performances and public interventions, for another 12%; and the fourth category, community art, accounted for 3% of artists (p. 58 – 59). Artists were included in as many categories as they declared.

Our study, meanwhile, offered respondents fourteen possible responses. We asked that they indicate not only their primary discipline, but also all the disciplines they practiced. As in the Maranda study, this analysis dealt with all disciplines, and artists could be included in more than one category. An overview of the artistic disciplines or media revealed the major predominance of painting, practiced by two-thirds of the sample, and at the same time showed the extreme diversity of disciplines or media practiced within the sample. Over one-third of the artists consulted practiced sculpture, and installation and photography were also practiced fairly widely, by more than one-quarter of artists in each case. Of the other media represented in significant numbers, among conventional visual media, printing and illustration were both identified by at least 15% of artists; and among new media, graphic design and video were both practiced by more or less one artist out of 10. Public art, itself a multidisciplinary spectrum, was also mentioned by nearly 15% of the sample. Other, more quantitatively marginal forms of art, such as multi-media, performance or textile arts, nonetheless regrouped significant proportions of artists, more or less 5% in each case. As well, a considerable number of artists (15%) declared another medium than the fourteen proposed by the questionnaire. These other art forms were not exclusively within the visual arts, and included literature, theatre, music and cinema; the range and diversity of visual artists' disciplines is evidently much broader than expected.

A more limited examination of only those primary disciplines declared would significantly modify these preliminary approximations, and the very question is informed by the inherently multidisciplinary nature of respondents' practice; one out of every four artists did not identify one or more primary discipline(s). Taking into account only those artists who declared a primary discipline, the proportion of so-called specialists only accounts for half of painters, for one-fifth of sculptors and for 15% of installation artists and photographers. The other visual-arts media, meanwhile, rarely garnered more than 5% of primary practitioners. A calculation on the basis of all respondents, taking into account also those artists who did not declare a primary discipline or who are explicitly multidisciplinary, further reduces the relative proportions in each specialized category (thus, “true” painters would only account for one-third overall, “true” photographers for 10%, etc.).

Subsequent, unpublished analyses have led us to attempt to identify groupings at the root of the multidisciplinary question (Bellavance and Gauthier 2002). We have distinguished six categories, ranging widely in size, level, medium and multidisciplinarity; the demographic and socio-economic characteristics of each of these groups also vary significantly. Four of them are related to the common working definition of visual arts: a first group formed mainly of painters (but who often draw or print); a second, sculpture/installation group (which also include a significant proportion of public artists); a photography/new-media group; and a performance-art group, which is especially characterized by a high level of multidisciplinarity. The other two groups identified are specific to this study’s sample: a painting/illustration group, whose practice tends to be more commercial, and a textile arts group, which discipline in Quebec is included in the visual arts. Note also that painting and drawing are very common in each of the groups.

5.3 Snapshot

There is a dearth of information on professional visual arts organizations, the provincial and national history—founding dates, significant moments—and geographical patterns of which remain to be delineated; we have found no base data (notably membership numbers) allowing us to undertake this type of profile, though a cursory examination suggests that the quantity of artist associations in the visual art far outnumbers of organizations of other stakeholders in the visual arts. An investigation into artist associations would have to take into account not only the numerous artists’ groups, but also the types of associations—union-model groups that represent only artists, artist-run centres whose membership is not limited only to artists, schools, academies or invisible colleges (based on aesthetic affinities rather than on conventional professional factors) or market-based affiliations (by which definition an artist must live from the sale of works on a given market), as well as the various categories of professionals involved (artists, critics, curators, dealers, etc.) and the different levels on which these associations operate (national, provincial, regional and municipal).

The prevalence of artist associations substantiates the artist-oriented character of this professional ecosystem, although it does not entail an especially enviable quality of life for artists. As research into the socioeconomic situation of artists suggests, a career in the visual arts is a risky business, weakly remunerated on average, with substantial disparities both in professional recognition and in socioeconomic success. Multiple jobholding—more or less related to the creation of works of art—tends to be a typical aspect of this line of work rather than a presage of professional abandonment or a sign of amateurism. The different configurations of multi-jobholding, and its professional consequences—which are not necessarily negative—remain to be explored. The definition of visual artists is not fundamentally a matter of enumeration; emphasizing the exact number of active, professional visual artists can be a statistical smokescreen concealing more revealing information. On the contrary, the definition of this population requires a consideration of its professional particularities: self-employment rather than salaried work; professional multidisciplinarity rather than a single job; a project-based rather than a company-based approach; ongoing professional development as opposed to terminal academic studies; and the determining role of renown as a factor and an indicator of professional success.

The increase of multidisciplinarity in the visual arts would also merit more thorough consideration. This challenge is not only methodological, however, but also conceptual, since multidisciplinarity calls into question the very principle of affiliation: is there a common core of practices, a single tradition or project shared by one community? As noted in the introduction, this commonality has more to do with shared mechanisms (production, dissemination, marketing, representation, etc.) that with universal technical competencies or clearly identifiable pedagogical knowledge. Until now, studies on artists have put heavy emphasis on socioeconomic conditions, and it is unlikely that this particular slant can be pursued much further; these studies are generally much less focused on the relationships and interactions between the primary players in the visual arts. As the sociologist Pierre Bourdieu has pointed out, visual arts are more accurately typified as a “symbolic economy” than an “economic economy,” a reversed economic situation where work is not created in order to make a living, but rather when one makes a living to be able to create. A purely economic assessment of artists' situation is therefore inherently limited.

Although the socioeconomic condition of visual artists is fairly well understood, the same cannot be said for other players in the sector, nor for the organizational approaches of artists vis-à-vis their various potential partners and the assorted mechanisms of the art world; these questions will be addressed in the conclusion.

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CONCLUSION

This critical summary of the current understanding of the visual arts in Canada is in line with the approach taken by the Visual Arts Alliance in its initial research plan on the state of the sector. Bear in mind that our reading was not intended to describe the state of the sector as such, but to produce <u>an assessment of the information available</u>, and was therefore primarily designed to serve as a research and reference tool that could be useful to the Alliance in its endeavours. As a result, this report initially takes stock of what is already known, to provide a more up-to-date basis for subsequent research; it identifies the main blind spots in current research, with a view to filling in the existing gaps; and it culminates by suggesting an initial framework for a realistic research strategy that would take into account not only the information necessary but also the research resources currently available in Canada.

Our conclusion will first relate the main observations from our examination of the available documentation to the research (and action) priorities formulated in the Alliance's initial Plan. We will then review the main gaps identified in the course of our analysis. We distinguish between two types of gaps: one is limited strictly to the lack of information on the current state of each of the five mechanisms of the body of documentation studied, while the other pertains rather to the elements that current documentation quite simply leaves unexamined. Certain possible ways of filling the existing gaps are identified, and formulated as preliminary suggestions for short- and long-term action, taking into account the information that is lacking as as the resources available.

Main Observations and the Priorities of the Alliance

Apart from making significant contributions to the bibliography initially compiled by the Alliance, our study offers at least partial answers to the three questions underlying the central research themes set out in the Alliance's initial Plan: 1) an economic and structural study of the <u>visual-arts sector</u>; 2) a study of the development of the visual art <u>market</u> in Canada; 3) a study of the <u>working conditions</u> of visual artists and art community workers and volunteers. With regard to the first question, our study provides—via a critical analysis of documentation on the five structural mechanisms in the field—an initial overview of the current state of knowledge on the sector's economy and structure. With regard to the second question, our fourth chapter furnishes a more precise summary of recent knowledge on the Canadian art market; this same chapter also proposes a preliminary look at the development of the contemporary art market within the context of the larger whole. Finally, in Chapter 5, an examination of the most recent studies on artists' working conditions begins by underscoring the complexity of professional artistic work and its remuneration: while artists as a whole have numerous sources of income, a relatively minor portion of their earnings is derived from specifically "artistic" work; moreover, most studies on the socioeconomic situation of artists highlight, by contrast, the absence of equivalent studies on the other categories of workers and professionals involved in the visual arts.

The consensus reached within the Alliance with regard to these three research priorities points to growing concerns about economic and organizational factors in the visual arts community, concerns that stand out from the overall orientation of previous studies of the field. These studies, which arose mainly from a history and theory of art centred on the study of works, have so far devoted scant attention to the conditions in which these works are typically produced and disseminated. The concepts of "sector," "market" and "work," which underpin the Alliance's questions, are crucial in regard to this more contextual investigation; introducing them into an analysis of the visual arts in Canada undoubtedly has consequences for the interpretation of the field as a whole, and applying them to the latter is bound to cause certain problems and may even give rise to a certain measure of resistance. In fact, these three concepts should really be considered in tandem. To what extent can one approach the visual arts as an industrial sector, a commercial market or a field of paid work? Can these three economic and organizational concepts do justice to the cultural, social and symbolic dimensions of arts practices? Shouldn't alternative concepts be considered? For example, would it not be preferable to replace the concept of industrial sector by that of socioprofessional ecosystem, which has in fact been widely used? Would it not be advantageous to dispense with the concept of a commercial and private market in favour of an inextricably economic, symbolic, private and public "field," as borrowed from Bourdieuian sociology, or opting for "network," with its associations to communications studies? And shouldn't the concept of paid work be abandoned, in this case, for that of "practice" or "competence," regardless of whether these practices and competencies are or are not remunerated? However we choose to proceed, we must keep in mind that these three ideas, although widely used in the research studies under consideration, are in fact rather poorly framed and defined, offering "pre-concepts" than clearly defined concepts. Analysis suggests that they should be used with caution. What are not only the possibilities but also the constraints and limitations involved in applying these (pre)concepts to a study of the visual arts?

Our analysis has allowed us to familiarize ourselves with the range of recent documentation available on the state of the visual-arts sector, and in turn has led us to identify five main areas of research that encompass as many formative dimensions of this world and help to provide an initial overview of the field:

1. The school as a mechanism of professional training and visual-arts education;
2. Public funding for the creation of Canadian works of art (via public bodies that support professional artists and arts organizations in the visual-arts sector);
3. Museums as mechanisms for collecting and exhibiting Canadian artworks;
4. The art market as a mechanism for selling artworks;
5. And professional groups as mechanisms for bringing together sector stakeholders.

This initial breakdown was intended to offset the main constraints identified by our preliminary research, namely the lack of studies designed to provide an overall analysis of the visual-arts sector in Canada. To varying degrees, these five mechanisms affect the entire range of Canadian visual art and concern all the professionals involved in the sector. Since existing data essentially describe or analyze one or more of these five mechanisms, it appeared that a proper apprehension of the state of available data was a necessary step toward an initial overall understanding of the visual arts ecosystem, both as a system and as an environment. The ecosystem trope also led us to wonder about the interactions that might exist among the aforementioned mechanisms, interactions that are likely just as significant as the individual functions of each one. For example, there is a very close link between art museums and the art market; the relationship between postsecondary visual-arts education and public art funding programs is just as important. Despite their precarious income situations, artists also play a key role in this ecosystem. Some progress has been made towards understanding the socioeconomic condition of artists, but our knowledge of their relationships with the other stakeholders in this ecosystem remain much more nebulous.

This study has allowed us not only to identify the most relevant sources of data for each mechanism, but also to put them into perspective and to determine the main areas where information is in short supply. There are two distinct types of lacunae.

The first strictly concerns the lack of information on the state of each mechanism: at this level, the main shortcoming is the lack of reliable, systematic, synthetic and recurrent nationwide data on these five specific mechanisms. That most public training, production and dissemination funding in the visual arts comes from provincial rather than federal agencies undoubtedly has something to do with this lack: a good part of the picture can be reconstructed only from this level and in conjunction with provincial governments. The original research project being conducted directly by the Alliance raises the question of whether these mechanisms could be best observed on the scale of Canada as a whole, or if one should proceed instead by the country's various provincial and regional, and particularly metropolitan, markets. Institutional and cultural differences (with linguistic differences occupying a prime position) cannot be underestimated. As well, the responsibility for providing such objective data has so far fallen to government agencies. Apart from the official data compiled by public bodies, what additional contributions to a clearer or more comprehensive picture of the situation can be provided by the many non-governmental organizations involved (chief among which are the members of the Alliance) and by university researchers (mainly art historians and theorists, who generally take little interest in the subject)? Despite the shortcomings we have identified with respect to the understanding of each mechanism, our study nonetheless points to a certain number of routes that could be taken at each level.

The second type of lacuna relates to the blind spots revealed by the existing body of information at our disposal. Our assessment of the state of current information remains wholly dependent on research that has focused almost exclusively on the empirical description of five particular mechanisms. In addition, analysis of each appears to have taken place in a vacuum, without any regard for the other dimensions that shape the sector: to our knowledge, no study has sought to connect the various components of this ecosystem, in order to identify a possible principle of cohesion necessary for structuring a true, autonomous "sector" distinct from the other sectors of cultural production. Moreover, operational research has shown scant interest in other dimensions that may potentially be just as relevant, or in other mechanisms that are no less strategic. Thus existing studies either neglect or play down several categories of stakeholders that nonetheless play crucial roles as intermediaries between these mechanisms. In this respect, the system of artist-run centres, the publishing apparatus (art magazines, scholarly publications, media) and the community of (individual or corporate) private collectors are three categories of stakeholders who must not be ignored, though their actions remain extremely vaguely outlined in the existing material.

Lacunae in the Existing Material

Although the scope and quantity of data on the five mechanisms may seem considerable, there still has not been a single relevant, systematic and recurrent study dealing with the dynamic of the sector as a whole; our study helps bridge a portion of the gap. Our summary confirms the existence of a relatively extensive body of material, but one that is for the most part episodic, fragmentary and without an overall trajectory. The difficulties associated with extracting data embedded in other sectors may sometimes seem insurmountable, and the broad variations observed between the uneven distribution of research at the national level and the scale of observation that seems to be favoured in visual-arts research raise serious methodological problems regarding the potential usefulness of this information in providing an overview of the sector. The very definition of the visual-arts sector varies in accordance with the specific missions and the sporadic strategic needs of the different sponsors, which is not conducive to integrating data. In light of this initial perusal, a "conceptual," functional and stable definition of the visual-arts sector would appear to be a prime strategic necessity for the Alliance. The five major mechanisms we have identified as making up the common core of the visual arts in Canada are constitutive of this initial desire to take an overall look at the sector and to develop a preliminary structural definition. Unfortunately, while each of these mechanisms appears to be formative for the sector, in the available literature they tend to be considered singly, or in only partial relation to the other mechanisms.

The same is true of our understanding of the mechanism of professional training and education. The observed lacks here are not only numerous, but varied. Our current knowledge of education and training is the haziest of the five categories. Once again, most of the data problematically exists at the provincial level, or even in university or college departments that offer this type of program. Nor is the definition of this sector consistent with that used by the arts funding bodies (art councils), art dissemination centres (art museums, artist-run centres) and sector associations. A comprehensive picture of this educational continent would also require knowledge of the formal and informal (academic and non-academic) training intended for professionals and non-professionals. Apart from specific learning tailored to artists and other professionals, an understanding of the structure of the apparatus of training and education cannot overlook an assessment of knowledge dissemination bearing specifically on Canadian art, and concomitant history and theories. To bridge the most obvious gaps would require primarily:

1. More effective, nation-wide professional training and arts education data gathering (involving in-depth research at provincial education departments, and backed up by a much-needed harmonization of analytical categories);
2. The development of a body of independent expertise on the state of the school system, including:
    a. Data on master's programs in the visual arts (strategic importance, limited number) could be a useful (and synthetic) indicator of the current situation and evolution of the domain;
    b. And measured portions of curricula (from elementary school to the PhD level) taken up by visual-arts education, and evaluations of its content—in order, first, to gauge how much time and effort the Canadian education system devotes to transmitting the history of Canadian art;
3. An inventory of professional training opportunities available outside the schools (by conducting research involving organizations devoted to human resource development). The apparent proliferation of such non-academic training could raise certain questions relating to the lack of formal postsecondary training: why, for instance, does such professional training fall outside the regular education system; and does this cause duplication and overlap?

The historical importance of programs providing public funding for artists and the more recent emergence of public-art commission programs are incontrovertible. Here again, the role of the provincial government, in conjunction with that of the municipal government (in regard to public art), appears to be indispensable. It should also be said that involvement is highly uneven from one province to another: Quebec and Alberta are far ahead of the pack, while Ontario and British Columbia are paradoxically far behind. In addition, with the exception of Quebec, the provinces have still not begun to make systematic and recurrent compilations of such strategic data: the initiative shown in this regard by Quebec's CALQ, OCCQ and MCCCF should be better known throughout Canada. If we look only at federal assistance, a very partial picture of the arts funding infrastructure across the country emerges. Compiling such data at the provincial level would help create a more nuanced understanding of funding systems and, among other things, would help identify the role and the weight of the artist-run centres, which receive much more support than the federal data alone would lead us to believe. The type of assistance provided is furthermore as important as the amount. These sums should be broken down by category—assistance to individual artists, grants to organizations (artist-run centres, museums, private galleries), and commissions of public artworks, art magazines—in order to delineate the operating logic of public agencies. The emergence, within the apparatus of funding, of a media-arts sector that partially overlaps the visual-arts sector also suggests that careful study of the actual configuration and intrinsic definition of the latter sector is required. Information on the number and nature of public-art projects funded at the municipal level is simply nonexistent, and in this area research would have to start from scratch. Finally, it should be said that public funding for the arts does not come only from government sources but involves also a whole set of private (and often non-profit) agencies that give out prizes, awards and grants. The involvement of private corporations in public art is noteworthy, but there is to our knowledge no information on the intricacies of private and public funding for artists; there, too, we would have to start from scratch.

The role of museums in collecting and exhibiting works of Canadian visual art is central to the development and vitality of the sector. Compared to artist-run centres, museums are unique in that, in addition to disseminating contemporary art, they are also involved in collecting and conserving it. By playing a strategic role in terms of acquisition, they directly affect the development of the market. In these ways, museums participate directly in constructing the history of Canadian art. Their twofold function (dissemination and conservation) is not easily identifiable from the available data. The effect in Canada of the practice of donating works to these museums is un-recognized, and its study must be a priority. Despite a certain amount of quality information (Statistics Canada, the Annual Reports of the Canadian Cultural Property Export Review Board), there is a stark lack of basic strategic information. Is it not paradoxical, for example, that we can currently estimate the revenue and expenses of art museums but do not have exact figures? Exact information is crucial to an accurate understanding of museums. The list of organizations certified under the terms of the Cultural Property Export and Import Act does offer an initial foothold from which we can proceed towards more exact figures. This operation should nevertheless be complemented by a number of other studies focusing on the scale and structure of these organization's funding, the value and nature of their acquisitions (purchases/donations, ancient/contemporary art, Canadian art/foreign art); the evolution of budgets devoted to the production of exhibitions of work by contemporary Canadian artists; and the structure and history of these institutions. Here again, the lack of centralized, relevant, recurrent, systematic and synthetic data, combined with the indifference of art historians, theorists and museologists, prevents broad portrait of this segment of this visual arts apparatus.

The art market is pivotal in our analysis, as a dynamic and regulatory force that has a tremendous impact on all of the other mechanisms we have identified. Serving as both a barometer for the entire Canadian visual-arts sector and as its main driving force, the art market is a particularly useful entry point for reconstructing an organic and dynamic overview of the sector. This being said, the required information is once again inadequate. The conceptual frameworks used to define this commercial reality themselves often seem to be deficient, which is why we must be wary of reducing this reality exclusively to its economic dimension and its most visible commercial operators; both public and private factors have combined to produce this commercial reality, which has a profound sociological significance that we have attempted to render in all its complexity. As Raymonde Moulin pointed out, the first features of this reality to be analyzed are primarily sociological in nature: "(the) price ratifies, in effect, a non-economic work, lending it aesthetic credibility in a certification process carried out by art specialists, historians, theorists and critics, as well as by museum curators and art professionals of all sorts (…) By allaying uncertainty as to the value of works, certification by experts becomes a way of correcting the asymmetrical nature of information that characterizes the art market."[112] The relationships be-

[112] Raymonde Moulin (1995), *De la valeur de l'art* (Paris: Flammarion), p. 256 – 257. [Free translation]

tween public museums and the contemporary art market must be foregrounded. The regulatory role of art fairs and other equivalent events, particularly those based in Canada—the Toronto International Art Fair is one example—must be considered from this angle; art fairs are not only, and maybe not even principally, forums devoted to financial transactions but also, like biennales, certification opportunities for both artists and galleries. The other main gaps identified include:

1. The lack of available information on the Canadian operations of auction houses (which are not all Canadian) and on the secondary market in general; the true extent of this secondary market and its relationships with the primary market remain to be explored;
2. The lack of available information regarding the purchase and acquisition of visual artworks by the major private collectors (companies, private foundations and individuals). Who are these collectors and how many of them are there?;
3. The need to distinguish between sales and purchases by various categories of Canadian and non-Canadian individuals and agencies representing, respectively, supply and demand;
4. The need to pay greater attention to the underground economy;
5. The need to verify the role of artists as suppliers/entrepreneurs and commercial operators (as opposed to the status of conventional workers or bricks-and-mortar dealers) in relation to museum acquisitions;
6. The need to establish and regularly update a map of those strategic places where Canadian artists and artworks circulate on the world scene;
7. The need to fill in the gaps in data pertaining to company sales using start-up data (in order to verify companies' health and longevity);
8. The need to refine our understanding of the various segments of the primary market made up of galleries, including, importantly, specific principles for differentiating the market from the galleries in terms of objective criteria: a) company size; b) how long the galleries have been in operation; and c) the aesthetic orientation of the products (old/new, Canadian/foreign, etc.), of clients (individuals, companies, museums), and of institutions (contemporary art, figurative art, various genres). Distinguishing galleries that represent artists who have works in museum collections is one useful avenue for exploration;
9. And the need to help establish an overall synthetic measurement of the commercial reality of the visual arts, which presupposes the development of a conceptual framework able

> to integrate all the relevant parameters and operators, while keeping in mind that this measurement will always be approximate and uncertain, given the number of stakeholders involved and the "company secret" factor (which hampers the collection of relevant and recurrent data).

We should add that existing analyses pay scant attention to the calculation of the expenses and the means of production (tools and materials) involved in the creation of works of art. What part do these costs play in the sector's economy, and who assumes them? Do the artists do so by themselves, or do they share the costs with other public and private stakeholders (museums, gallery owners, art schools)? The economic impact of the adoption of new digital technologies, in terms of both production (digital art) and dissemination (websites), must also be taken into consideration. We have not found any pertinent studies on any of these factors.

Finally, there is a lack of information on the workings of sector associations and on the methods used to form professional groups. The formation of professional groups and their mobilization around issues related to the promotion of their profession play a strong role in shaping the visual-arts sector and differentiating its various functions. The mobilization of artists to improve their status and the conditions in which they make art is fundamental, and has led to a certain number of studies that have helped to clarify the economic situation of artists. However, these steps toward a better understanding of the economic situation of artists have not managed to solve the preliminary and more general problem of professional criteria. Should we adopt the artist's self-definition as our sole criteria (I am an artist!); or should it be the practice (I am a painter, therefore I am an artist) that makes the difference, or the portion of one's income that is derived from art making (at least 50%?)? To what extent should we take account of the various objective means of recognition, whether "professional," social or economic (higher education, scholarships, sales, prices and awards, media exposure, international profile, or inclusion of work in a museum collection)? The number of artists will obviously vary depending on the criteria; the population of artists will be larger or smaller depending on whether the criteria are open, or more restrictive. For example, the relatively loose criteria on which the official statistical definition of this population is founded could partially account for the very low average of its declared income. But can such criteria really be formalized? Faced with this dilemma, egalitarianism is undoubtedly not the best solution. On the contrary, it seems that we need to approach an artist's career from the perspective of the construction of his or her reputation. This is built from within an ecosystem with a certain number of objective parameters that establish the conditions for recognition at any given moment and in any given context. The shape of an artist's reputation may vary, of course, depending on whether it stems mainly from market factors, for example, or from art institutions; it can also vary with the concept of art associated with certain modes of organization that typify the practice (more or less craftsmanship involved, more or less of a conceptual flavour). But from inside each one it is undoubtedly possible to establish the degrees.

Apart from this last question, other lacunae can be observed with regard to the activities of associations belonging to the sector as a whole:

1. There are no histories of such associations (dates or key moments);
2. There are no geographic perspective (no sense of the territory into which a given association fits);
3. There is no database (membership numbers for each association);
4. There is a contrast between the diverse and recurrent data pertaining to artists and the total absence of data relating to the other categories of independent or salaried workers involved in the visual arts: critics, independent curators, exhibition-centre coordinators, magazines directors, professors, etc. Our knowledge of the economic conditions in which artists ply their trades and of how they are paid must be complemented by a contextualization involving the entire ecology of the sector. A better understanding of the relationships between artists and the other categories of professionals and collective players in the sector (artist-run centres, museums, funding agencies, private collections, etc.) appears to be all the more crucial in that the main determinants of an artist's reputation and professional identity emerge from these same relationships.

Blind Spots

A better understanding of the five focal mechanisms of the visual arts is a necessary prerequisite to a better understanding of the sector as a whole. Filling the information gaps alone will not provide a truly comprehensive perspective, however—current analyses reveal a number of blind spots.

First among these deficiencies is the omission of several strategic stakeholders. Artist-run centres, publishing network and collectors all play important roles in the visual arts, whether as liaisons or mediators among the sector's various mechanisms. They are essential connective tissue in the visual arts world. Artist-run centres, for instance, have incredibly complex, diverse functions, which the current body of information does not adequately distinguish—from mediating between the education and professional stages, to providing a vital connection to public-funding mechanisms. Artist-run centres have provided preliminary qualification or professional endorsement for many recent generations of artists; alongside museums, they play a significant role in the dissemination and circulation of contemporary Canadian art; although they have no explicitly commercial objective, artist-run centres do facilitate artists' access to the contemporary art market, both in Canada and internationally; and they are key national, provincial and local sites for the development and maintenance of the professional visual arts community.

The publishing system, meanwhile, also directly affects artistic training and education: the historical, theoretical, media and promotional discourse on art is a fundamental aspect of education. The publishing apparatus of the visual arts world is among other things an unavoidable regulatory force shaping the administration of individual grants to artists, to museum programming and collections. Contributing to not only the symbolic but also the economic valuation of artworks, the publishing system affects pricing and status, and thus has a direct market impact. The absence of spokespersons from this sub-sector at the Alliance, perhaps due to a lack of representative organizations, should also be noted.

Finally, there is a surprising lack of information concerning private collectors and individual and private collecting in Canada. As has been noted, art collecting is not clearly a private/public system, but a rather more indistinct grey area.[113] A description and analysis of the apparatus of art collection is a missing link in our understanding of the operation of so-called public museums (which are in fact partially private) and of markets that, while theoretically private, are in fact

[113] According even to many economists, art is a semi-public product.

extremely dependent on public regulations (notably the Cultural Property Export and Import Act, on which the system of tax deductions for artwork donation is based).

The omission of these three groups of visual-arts stakeholders is in part related to the lack of specific data in each area: the history of artist-run centres, collectors and the narrative of Canadian art remains to be written. This dearth of information is largely the result of the lack of interest, within Canadian art history and in university research, for a systematic examination of the artistic ecosystem and its various sub-systems. The only manifestation of interest for this type of analysis seems to be "operational" studies, the conceptual framework of which does not really allow the integration of all the stakeholders involved: operational research is based on data and on administrative decisions which more often than not reaffirm pre-existing empirical and not very conceptual definition of contemporary visual arts practice. Focusing on the professional, industrial, institutional and entrepreneurial aspects of the "ecosystem," this research tends to underestimate or overlook the weight and the specific role of a number of generally discursive premises that, often tied to art history and theory, are actually at the root of what might be termed the validation, legitimization and/or consecration processes, not only for artists and artworks, but also for other categories of professionals, businesses or institutions involved in the visual arts.

This legitimization is evident within each of the five mechanisms under consideration. Schools, public support programs for creation, art museums, art galleries, and professional associations are not only economic, functional structures dealing with the production and dissemination of Canadian art; they also represent at least as many systems or establishments for the validation, legitimization and/or consecration of those individuals and collectives involved in the ecosystem of the visual arts. A significant proportion of the career dynamics, first and foremost those of the artists themselves, could then be explained through a search for (symbolic) recognition as through a quest for (monetary) remuneration. In that same vein, the role of the collector should not be reduced to merely that of a buyer or ultimate consumer, who "hoards" works. On one hand, collectors also play a qualification role, since an artist's presence in a (good) collection is both a recognition and marker of quality for other buyers; on the other hand, a collector's function, which extends to the essential public circulation of works through donations, but also through foundations, cannot be reduced to "hoarding."

Keeping in mind the Alliance research priorities, this relatively extensive and diverse body of research deliberately excludes the vast fields of art history and theory. Canadian art history focuses more on the analysis and interpretation of works, and rarely includes other components of the ecosystem. Art history and the discourse on art in general are no less important in positioning these artworks and artists in the Canadian and international repertoire, and the historical, theoretical, media and promotional conversation is an important point of reference that guides and directs the choices and decisions of stakeholders in the professional sector of the visual arts. Art history and theory, straddling as they do science, discourse, institution, tradition and professional practice, are traditional components and important regulatory forces for this particular ecosystem.

It is tempting to approach the legitimizing role of the discourse surrounding art as a possible sixth mechanism, that of recognition, in the visual-arts sector. Less tangible and less easily quantifiable, recognition, which falls primarily under the purview of art history and theory, is also dealt with currently by more or less specialized media; there is thus significant overlap with the aforementioned publishing mechanism. This sixth theoretical and media mechanism is furthermore not strictly Canadian. On the contrary, it is largely international; the Canadian value of works is not independent of their international value. The lack of interest in this mechanism is perhaps the most glaring blind spot in the documents studied. The challenges of defining the sector, the market or the professional criteria of the visual arts are closely linked to this lack of interest in the processes of recognition within the visual arts ecosystem. Current analyses tend to downplay if not omit outright this more political validation, preferring to focus on empirical situations tied to a narrow concept of the market and of the economic, financial or functional organization of the sector. The oversight of art history and of the discourse surrounding art in general—key aspects of the internal dynamics of the visual arts ecosystem—can lead to an incomplete, partial or truncated understanding of the most empirical professional situation. We must keep in mind that what motivates many of the stakeholders who are the most closely involved in this ecosystem has to do as much with the development of art history (and the place of Canadian art in global art history) as it does with the economic issues. By completely disregarding this "symbolic economy" (to return once again to the distinction made by the sociologist Pierre Bourdieu), we run the risk of depriving the sector of a significant portion of its rationale and of its internal coherence. An analysis of this mechanism also raises several questions that are as bothersome as they are interesting. Is there a system of validation (or consecration/legitimization) that is properly Canadian? Is it, on the contrary, entirely non-Canadian? What is the language of the discourse around art in Canada—is it English, French, bilingual, multi-linguistic? To what extent does this frequently polemical discussion affect the life of artworks, of the public, of artists and of exhibition programmers? What individuals or networks in Canada have this consecration/legitimization authority?

As was noted in the introduction, the very notion of visual art remains inextricably historical. Anchored in a long history, it is the result of a historical construction process. This history-dependent definition is all the more important now, as strictly socioeconomic approaches to the arts and culture are privileged overwhelmingly. Driven by policies that favour the development of so-called cultural and/or creative industries, this evolution has been affected by the search for quantitative indicators of economic activity, often to the detriment of more qualitative, social benchmarks. The trend of approaching the visual arts as a legitimate economic sector, as a market in which monetary values are traded, and as a remunerated (or at least remunerable) labour pool is itself a historical phenomenon. While quantifiable information is useful and necessary, is it just as important to get the measure of the conceptual construction of these data. It bears remembering that the visual arts world, compared to other sectors, markets and professions, is defined by the preponderance of independent producers (artists and freelancers) or volunteers, of micro-businesses (galleries, magazines), of not-for-profit organizations (museums and other exhibition sites, teaching institutions, private foundations), none of which can be overlooked in an analysis of the dynamics of the exchanges in this universe.

Research Strategy Framework

There are several possible strategies by which the Alliance might remedy the fragmented and episodic understanding of the visual arts in Canada. We suggest two major research approaches: short term, and longer term. Before either research approach is undertaken, a consultation of Alliance members and partners is required to validate and complete this research summary, and to allow the Alliance and its members to absorb the study results (which is all the more important should the Alliance wish to make documentation and research one of its primary raisons d'être). These approaches would also be worth extending to other partners and strategic stakeholders who are not currently involved in the Alliance, including university and college departments devoted to visual-arts education, art curators and critics, art magazines, and private foundations. The wider documentary research process briefly outlined below could thus help broaden the Alliance's current base.

A first, short- and intermediate-term approach would mobilize primarily, but not exclusively, the internal resources of the Alliance and of its main government partners. University partners, including the author of the present report, would act as secondary resources, providing for methodological support, and carrying out ad hoc studies. The main objective of these approaches is the establishment of targeted "strategic watches", and the development of a central documentation centre, both managed by the Alliance, in order to gather basic information on the visual arts relatively quickly while ensuring a central updating process for the data and the documentation. Both could benefit from substantial support from this documentary work we have undertaken. Short- and intermediate-term solutions are likely the most flexible and the most closely aligned with the immediate needs of the Alliance.

A second type of strategy would be more long-term, and entail the development of one or more national partnerships that would bring together Alliance members, targeted institutional and government partners, and university researchers from across Canada. This team could also potentially collaborate with similar collectives abroad. The aim of such a partnership would be to study the current structure of visual arts in Canada through the lens of its principal regional markets, and it would involve not only regional and national empirical observations of the sector various components, but also require the development of a conceptual framework buttressed by a critical consideration of the existing frameworks. Generally speaking, it would include the development of the analysis put forth in chapter four in order to integrate the other mechanisms and components of the sector—those that have been studied, as well as those that remain to be studied. The current state of various regional markets would also be assessed in light of these parameters. This second approach would largely rely on the outcomes of the first.

Both of these complementary approaches imply different constraints, not only in terms of their timelines, but also regarding the financial and logistical investment required. Both are organized responses to the dearth of global perspectives of the visual arts and both meet the needs of some of the specific concerns of the Alliance. At this stage, we are only submitting for discussion an initial outline for each of the two possible approaches, without raising the question of the available funding for the activities involved. The detailed development of each of these studies would be an entirely other mandate.

Short- and Intermediate-Term Approaches

1. Within the Alliance, designate the person responsible to conduct the **Alliance member and partner consultation** to validate and complete this research summary.
2. Gather the entirety of the documentation gathered in the course of this study in one location to eventually develop a **visual-arts sector documentation centre** and continue the bibliographical survey undertaken here. An information/document management professional will have to be hired to ensure digitized management (through EndNote or similar software) and the development of a pertinent document classification system. This work could perhaps be done with the support of the author of this report or a member of his team. The hiring process is a step in itself, and could also benefit from the support of the author of this report or of other university resources.
3. Establish a **targeted strategic foresight** system to: a) monitor and regularly integrate (perhaps on an annual basis) official data from the sources identified in this report; b) ensure the gradual integration of other sources of existing equivalent, pertinent data; c) analyze and produce occasional syntheses of this information; d) support the Alliance in developing survey tools for its members (for instance, an annual census); e) compile a comprehensive list of the stakeholders involved in the Canadian visual-arts sector; and f) disseminate this information on a website managed by the Alliance. The centre's documentation coordinator could be charged with this task, or the role could require supplementary human resources, such as an operational research specialist. There are two human-resource possibilities—a paid position could either be created within the Alliance, or else the work could be contracted to an external consultant. In either case, the person or company hired will have to demonstrate research

skills and an understanding of the visual-arts milieu, and be familiar with website management. This second hiring process would constitute another step in itself, and would also require support from university resources.

4. Initiate or continue **discussions with producers of official data** and government partners, primarily provincial, as well as institutions (including college and university visual arts departments) to gather more precise data on a) arts-education and professional development programs; and b) support programs for artistic creation (for individual artists, artist-run centres, art magazines, contemporary art galleries, etc.). These new data should provide more precise information not only on public funding but also on the socioeconomic characteristics of the programs' clienteles. Beyond, documenting municipal and provincial public-art programs will require some additional work. Many Alliance members could contribute directly to these approaches. Artist-run centres' associations, for instance, could help draw up a more exhaustive list of centres that are not currently enumerated by official programs. A committee, with the support of at least one research professional, will be chosen from among Alliance members.
5. Mobilize the resources of **museum** associations to obtain a more comprehensive view of the distribution and characteristics of the network of visual art museums in Canada: numbers, location, size, annual budget, and any other pertinent features identified in this report. The list of museums accredited by the Cultural Property Export and Import Act would provide an outline the institutions to track. The Alliance should notably initiate contact with these museums in order to have the museums, with the support of the strategic foresight director, draw up a more precise profile of programming and acquisitions, around the following categories of artworks: old/contemporary, Canadian/foreign, purchases/donations. It would also be worthwhile to gauge the interest in occasionally (perhaps annually) repeating the survey, producing a regular, systematic overview of the collection and exhibition practices of these accredited museums.
6. Mobilize current Alliance members in order to map the current mechanism of **professional associations** in the visual arts, and to obtain a profile of each, including founding date, level (national, provincial, regional, local, etc.), mandate, number of members. The coordination, compilation and validation of these figures would normally fall to the strategic foresight director, but could be delegated in part to a third party (university researcher, consultant). Each

association, meanwhile, will designate a member responsible for collecting and compiling the information. Finally, a series of more in-depth ad hoc studies on the various components of the sector could be carried out by university research teams with the support of a Canadian cultural institution like Canadian Heritage or the Canada Council. Artist-run centres would notably warrant a detailed historical and socioeconomic study.

7. Initiate discussions with representatives of art magazines to carry out a **survey of the publishing apparatus** of the visual arts in Canada, based on the data-collection model used for the other components of the visual-arts sector. This ad hoc study could be conducted jointly by the professional(s) hired by the Alliance and by a university team, with the support of a Canadian cultural institution like Canadian Heritage or the Canada Council.
8. Initiate the updating of information on **private-sector involvement** in the visual arts. This step consists of gathering available documentation on the main private stakeholders: art galleries, private collectors (individuals and corporations), private foundations and any other individual or organization involved on a private basis in the valuation of artworks or artists (through a prize, for instance, or some honorary distinction). This step should be the responsibility of the document centre and/or strategic foresight coordinators, with the support of university resources and in collaboration with Alliance member associations, especially dealers' associations. This step would in fact be a crucial first gesture towards a more involved study of the **contemporary Canadian art market** (as outlined in the second approach) by a prospective inter-university consortium.

Intermediate- and Long-Term Approaches

This second approach requires the development of a research partnership between the Alliance, some of its government partners, and the university community. It would also necessitate a more complex financial and logistical armature, notably requiring accredited research grants form federal and provincial social sciences and humanities bodies (some such funding programs currently exist in Canada). This approach would also involve the identification of pertinent university resources that could be harnessed for this research effort; these researchers would not only represent different strategic regions in Canada, but the team would also need to include multidisciplinary competencies, including minimal art-history competencies, sociology, economics, and possibly expertise from other fields (jurisprudence, management, etc.). However, there are a number of preliminary decisions that need to be made before this approach is set in motion, notably in regard to the scope and the theoretical framework of such a study. We outline the advantage of such a study below, and briefly indicate its general orientation and main parameters.

Our readings have suggested that the challenges presented by the art market might be the most fruitful point of entry to create a profile of the current structure of the Canadian visual arts, in part to integrate the entirety of the sector's components. However, as has been shown, the scope of this type of study could vary significantly: from an overview of the private art gallery system on the primary Canadian market, to, at the other end of the spectrum, a more comprehensive consideration of the commercial and non-commercial operators involved in the valuation of artworks on both the primary and secondary markets, in Canada and abroad. In theory, the conceptual framework informing such a study could be merely economic; however, it could also involve important sociological and historical dimensions, with a more symbolic and political tenor. The geographical roots of these markets might also be considered on different scales: the Canadian visual art market can be seen as one big nationally integrated market, or it can be looked at as a grouping of more or less integrated regional or even local markets.

The advantage of a study on the art market lies in our opinion in the possibility of a reconstruction of the visual-arts sector in Canada to do it justice economically, sociologically and historically. The assessment can not be restricted to a cursory study if the private gallery network; on the contrary, such a study must be able to take into consideration the entirety of the commercial and non-commercial operators involved in the valuation of artworks. If it must rely only on an evaluation of the monetary transactions that take place in the art market, research will necessarily ignore the symbolic value attached to these transactions, values that are deeply rooted in the history of societies and communities. Finally, taking into account the significant cultural and institutional variations within which the Canadian visual-arts sector operates, a precise analysis of this apparatus would require consideration at least at the level of the regional markets—in Montreal, Toronto, Vancouver, and others that remain to be identified.

A first step would be to form an interdisciplinary, pan-national research team, the creation of which is an entire step in itself. Once established, the team's first task would be to integrate and harmonize the data gathered through the strategic watches and ad hoc studies; this data integration would evidently require the development of a cogent conceptual framework, of which our chapter four analysis could be the basis. This conceptual work would notably be enriched by an international integration of university research. Our report has noted a significant body of non-Canadian research, most often theoretical in nature, without fully bringing these sources to bear on the analysis. A foreign-literature review would be a prerequisite to the development of a conceptual framework, and would enable a comparison of the Canadian situation of the visual arts and of the sector's various components with the international situation. The team would also be responsible for the development of possible collaborations with international researchers, which could lead to collaborative research projects.

The team's second task would be to develop the various issues this report has only skimmed, but which are no less pivotal in the development of the Canadian art market: copyrights and remunerative structures, the impact of new technologies on production and dissemination, the relationships between primary and secondary markets, market segmentation, the impact of museums' acquisition policies on the market structure, and any other issues the Alliance deems should be considered in greater detail. This list should be developed in conjunction with the Alliance, as should the scale and the scope of the undertaking—step-by-step pilot projects carried out in various regional markets could be more feasible, and more worthwhile. The number of researchers involved and the structure of the research team also remain to be defined.

There are two new Social Sciences and Humanities Research Council (SSHRC) programs that currently seem promising to support this undertaking. The government of Quebec also administers similar programs. In any case, any grant application would require an initial investment of time and resources on the part of the Alliance, for which consideration our report offers a launchpad. The two Canadian partnership-support programs described below are only two possible sources of support. Both the Partnership Development Grant program and the Partnership Grant were created to replace the now-expired Community-University Research Alliances program. Both programs define a partnership as a "bilateral or multilateral formal collaboration agreement between an applicant (normally an individual or a Canadian postsecondary institution) and one or more partners (who) agree and commit to work collaboratively to achieve shared goals for mutual benefit." This definition seems perfectly aligned with the project, the interests of the Alliance, and the mandate of the INRS.

The Partnership Development Grant program is a first step to submitting a project proposal for support to the second program. The objective of the Partnership Development Grant program is to support the development of an effective partnership between various stakeholders, over two or three years, for recurring amounts of $75,000 to $200,000 per year. The grants are awarded based on an assessment of the <u>level of commitment of the partners</u>. The SSHRC evaluation of the projected organizational value of the partnership hinges on several criteria: governance, strategic plans, memoranda of understanding, agreements regarding intellectual property, and/or letters of participation and commitment. It would be wise for the Alliance to consider its support of researchers in light of submitting a request to this program, establishing organizational and partnership bases and developing a shared research protocol. A Partnership Development Grant would serve as a first step, before submitting a Partnership Grant proposal. Note that there is no SSHRC support to research infrastructure. Candidates are, however, eligible for infrastructure support from the Canadian Foundation for Innovation (CFI) Leaders Opportunity Fund; it may even be wise to submit a simultaneous request to the FCI.

The second program is clearly more compelling. This program offers four- to seven-year grants for totals between $500,000 to $2.5 million. However, it requires preliminary methodological and strategic choices regarding the type of partnership the Alliance wishes to develop: from the creation of a research chair on the visual arts in Canada, to the establishment of a partnership management research centre, or to multi-sectoral collaborations for knowledge development, there are a number of exciting possibilities for organizational partnerships. Each one includes an imperative working relationship between the Alliance, the university network, and other, existing resources. For this reason, we recommend that the Alliance first work to strengthen partnerships in the context of the first program. Concretely speaking, this would entail hiring a third party to write a grant application to this program, as early as next year (the program deadline is November 30, 2011), thereby laying the groundwork for an effective, pan-Canadian partnership that would increase the likelihood of obtaining support through the second program.