Study of the Crafts Sector in Canada:

Inventory and Summary of Current Literature; Defining the Crafts Sector; Working Together to Develop the Crafts Sector

A Study

Coordinated by
Conseil des métiers d'art du Québec (CMAQ)

for

The Canadian Craft Federation/Fédération canadienne des métiers d'art (CCF/FCMA)

and prepared for

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The French version of this study is being prepared.

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1.1 Introduction

The crafts sector encompasses a wide variety of economic and cultural activities, most rooted in the design and making of expressive, functional or decorative goods. Governments in Canada are often ambivalent toward the crafts sector due to a perception that it is neither economically important enough to warrant economic development support nor sufficiently artistic to deserve significant attention from culture or heritage ministries. These perceptions are beginning to change as Canadian crafts producers are increasingly recognized for superior craftsmanship, and as the link between high quality crafts production for gallery and art markets or tourism is recognized. There are signs that there is a growing demand for the unique products made by artisans and craftspeople, and significant economic valued-added is generated by this activity.[1]

Some of the difficulty in gaining the attention of government may rest in the degree to which crafts is also a very popular field for amateurs and hobbyists. While amateur activity should be valued in its own right, in the minds of the public it tends to obscure the activity of highly skilled professional artisans and craftspersons. The contemporary crafts sector produces highly valued functional as well as artistic items such as fine glass, musical instruments, furniture, unique textiles and clothing items, quilts, and fine jewellery, ceramics, and sculpted objects in various materials. Markets for these goods are both domestic and international, and a significant area of growth is demand from tourists looking for high quality, uniquely Canadian items to use, to wear, or display in their homes. The crafts sector provides alternatives for those whose tastes go beyond the purely functional and mass-produced, and can appreciate the beauty of a unique design and superior craftsmanship.

The purpose of this study is to review the current state of knowledge of the crafts sector in Canada and to identify the major gaps in this knowledge. The study has three specific objectives: first, to gather and briefly summarize information currently available on the sector; second, to elaborate issues concerning the definition of the sector; and finally, to provide guidance on how crafts representatives might work more effectively, together and in partnership with governments, to develop the sector and its domestic and international markets.

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[1] Throughout this document, the terms *artisans* and *craftspersons* are used interchangeably to designate the core group engaged in professional crafts activities.

1.2 Methodology

Consistent with the current working model of the CCF/FCMA, one of its constituent provincial councils, the Conseil des métiers d'art du Québec (CMAQ) took the lead in guiding this study project on behalf of the federation. Industry Canada, in cooperation with the Department of Foreign Affairs and International Trade (DFAIT), commissioned the study.

Materials for this literature review were collected from the provincial crafts councils or were found on the Internet using several search engines. This information was augmented with interviews with representatives of crafts organizations across Canada. We were told that several studies and planning exercises were underway in various provinces, but their reports were not yet available. Similarly, we were told that some larger, but dated studies existed, but the fact that they were not available in electronic format, combined with the short time frame for the research, precluded their review for this document. All these documents are included in the bibliography.

We note that there are significant differences in the information available across jurisdictions in Canada. This literature review can only report on the information available, and note, not fill, the obvious gaps in information needed for a complete portrait of the economic and cultural significance of the crafts sector in Canada.

1.3 Profile of the Crafts Sector

Some of the public understanding of the crafts sector may be attributable to the difficulty the sector has in describing itself in the same economic and labour market terms that other industries, such as automobile manufacturing or food processing, are able to do. By definition, the crafts sector is composed of small and micro-business, with work often conducted in studios and workshops that are not nearly as obvious to passers-by as the large factories, warehouses, or office buildings of other industries. The “economies of scale” that drive international competition in many goods markets are rarely a factor in the crafts sector, though there are crafts communities and collectives that sometimes band together for sales and marketing purposes. This low profile of the sector obscures the substantial economic and cultural contribution of artisans and crafts markets.

The small scale of studios and diversity of media in the crafts sector also means that it is more difficult to create and sustain business or industry associations in the sector. The crafts community is diffuse and loosely organized, partly because it is possible for an individual to design and make products without the support of other organizations. There appear to be no dominant individuals or companies that could recoup the cost of large-scale marketing efforts. Full-time paid employment is currently relatively rare compared to other occupations, and average incomes of craftspeople are at the lower end of the income spectrum (Human Resources Development Canada, 1994). Consequently, the crafts sector has had difficulty presenting its case for support and market development despite having significant economic impact, and substantial potential to provide high-skill, high value-added employment in all regions of Canada.

From the cultural point of view, the crafts sector often plays second fiddle to other, higher-profile cultural industries such as the performing arts in music, theatre, film, and television; the visual arts; and book publishing. Crafts products are physical and cannot typically be transmitted through electronic media (except as photographs of objects), as music and motion pictures can be, so there is rarely promise of development of a very large market as might be the case with popular music or hit movies. Editions or reproduction are rare -- each object typically made by the artisan -- and there are no "copies" to be sold at lower prices. Though high volume is not the way artisans generate value, successful craftspeople can turn relatively inexpensive materials into highly valued works or products and enhanced marketing can increase both the output and the value of crafts products.

So why should anyone care about the crafts sector? What promise does it show? Many believe that the crafts sector has an economic impact far greater than a typical economic study might indicate. There appear to be good reasons why a conventional economic analysis of the sector significantly understates its economic activity and importance in the Canadian economy and culture. Crafts activities are diffused among a variety of Statistics Canada industry classifications, with the consequence that it is difficult to isolate crafts economic activity. Much of this is due to the fact that many manufacturing industries have their origins in crafts, since the crafts industry is often categorized by the primary materials used such as wood, metal, clay, leather, fur, or cloth. As a result, an economic analysis of the crafts sector requires a more careful analysis than a simple gathering of data from Statistics Canada.

A more promising avenue is to define crafts in occupational rather than industry terms. The core of the sector may be considered the Standard Occupational Classification (SOC) of Artisans and Craftspersons (SOC F144). The major drawback of the occupational analysis is that many major measures of economic activity -- such as GDP, sales, and trade -- tend to be industry rather than occupation based. Nevertheless, employment and income information is typically available on an occupational basis, and it gives reasonable indications of economic activity.

For these reasons, a profile of the crafts sector based on commonly available data is unlikely to provide a full picture of its economic and cultural impact. Nevertheless, lack of resources devoted to credible alternative sources of data has forced interested groups to do the best they can with published data. We do not, therefore, criticize the quality of the literature or analysis reviewed here; we merely wish to point out that even the highest quality analysis of existing data is unlikely to present an adequate portrait of the Canadian crafts sector.

1.3.1 Profile of Craftspeople

Our review suggests that the literature profiling the workforce in the crafts sector is rather sparse, likely due in part to some of the difficulties elaborated above. The crafts sector was included in 1994 study of the visual arts produced by Price Waterhouse for Human Resources Development Canada (HRDC) and the Cultural Human Resources Council (CHRC), but there has been no comprehensive study of crafts in Canada in the last seven years. Much of the recent analysis of the crafts sector in Canada was produced in Quebec, with an understandable emphasis on profiling the sector in that province. While we attempted to describe the crafts workforce in Canada to the extent allowed by the available literature, the reality is that there is significant variation in the information available across the provinces.

Quebec, more than any other province, tends to see the crafts sector as an important part of the heritage, culture, and economy of the province. The province has, therefore, provided significant resources for the study and development of the sector. This support has allowed the Quebec crafts sector to document their economic activity and impact more thoroughly than any other jurisdiction in Canada. Though these studies originate in Quebec, they often include information about crafts sector in Canada as a whole. Information from other provincial sources, when available, has been included but there appears to be substantial differences in methods and definitions used, making it difficult to compare data across jurisdictions.

Statistics Canada typically provides data on economic activity using industry and occupational classifications. Use of these classifications and data permits comparisons across sectors of the economy, and with similar industries in other countries. The broad *industry* divisions in which those from *occupational* group ‘artisans and craftspersons’ work are identified in Table 1.

According to the 1996 Census, artisans and craftspersons represented 0.1 percent of the total labour force, as shown in Table 1. The table also shows that artisans and craftspersons are relatively heavily concentrated in manufacturing, retail, and other service industries. About 34.5 percent of artisans work in businesses classified as Retail Trade, 29.7 percent in other service industries and 26.6 percent in manufacturing Industries. In each of these industries, the proportion of artisans exceeds the Division proportion of total employment, indicating that artisans constitute a relatively high proportion of employment in those industries compared to other industries. For example, 34.5 percent of artisans work in retail trade business, whereas retail trade accounts for 12.4 percent of the labour force.

Table 1: Industry Counts and Distribution of Labour Force and Artisans & Craftspersons.

	Total Count	% of Total Labour Force	Number of Artisans	% of All Artisans
Total labour force	14,317,545	100.0	18,685	100.0
Division A - Agricultural and related service industries	485,600	3.4	130	0.7
Division E - Manufacturing industries	2,039,845	14.2	4,970	26.6
Division F - Construction industries	822,350	5.7	115	0.6
Division G - Transportation and storage industries	598,925	4.2	15	0.1
Division I - Wholesale trade industries	711,825	5.0	325	1.7
Division J - Retail trade industries	1,781,250	12.4	6,440	34.5
Division M - Business service industries	937,630	6.5	175	0.9
Division N - Government service industries	887,450	6.2	210	1.1
Division O - Educational service industries	1,005,585	7.0	370	2.0
Division P - Health and social service industries	1,409,170	9.8	305	1.6
Division Q - Accommodation, food and beverage service industries	988,585	6.9	45	0.2
Division R - Other service industries	1,098,030	7.7	5,555	29.7
Other industries	1,551,300	10.8	30	0.2

Source: Statistics Canada, 1996 Census.

Craftspeople can be divided into trade families by medium. Families include wood; ceramics; fibre; leathers and skins; glass; paper, print and binding; metals; and, multidisciplinary. An analysis of craftspeople in

Quebec suggests that artisans are relatively young, as indicated by the estimate that 65 percent of current craftspeople are expected to be still working in twenty years. Nearly 61 percent of craftspeople hold a post-secondary degree. In 1995, according to a CMAQ survey, almost 75 percent of craftspeople in Quebec had over 10 years of experience (Conseil des métiers d'art du Québec, 2001).

A recent study of the crafts sector in Canada (Sabourin, 2000b) showed:

- Between 1991 and 1996, the number of Canadian crafts workers as defined by the artisans and craftspersons occupation group, decreased by 17%, from 21,860 to 18,055. Only the Northwest Territories and New Brunswick increased their numbers of craftspersons during this period, by 14% and 23% respectively. In relative terms, the provinces with the largest decreases were Newfoundland (with a 46% decline between 1991 and 1996), Quebec (a 37% decline) and Saskatchewan (a 23% decline).
- Between 1990 and 1995, Canadian craftspeople experienced a 21% decrease in their annual average income, dropping from \$13,480 to \$10,606. Quebec workers were less severely affected since their average income decreased by only 12%.
- The number of full time artisans in Quebec decreased by 33% between 1990 and 1995 and was at 5,880 workers in 1995. Only Newfoundland has increased its full time crafts workforce over that period.
- In 1995, women represented 65% of the total number of crafts workers in Canada, compared to 70% in 1990. In 1990, the average income of Canadian female artisans was 44% lower than that of their male counterparts, declining further to 42% in 1995. (Sabourin, 2000b).

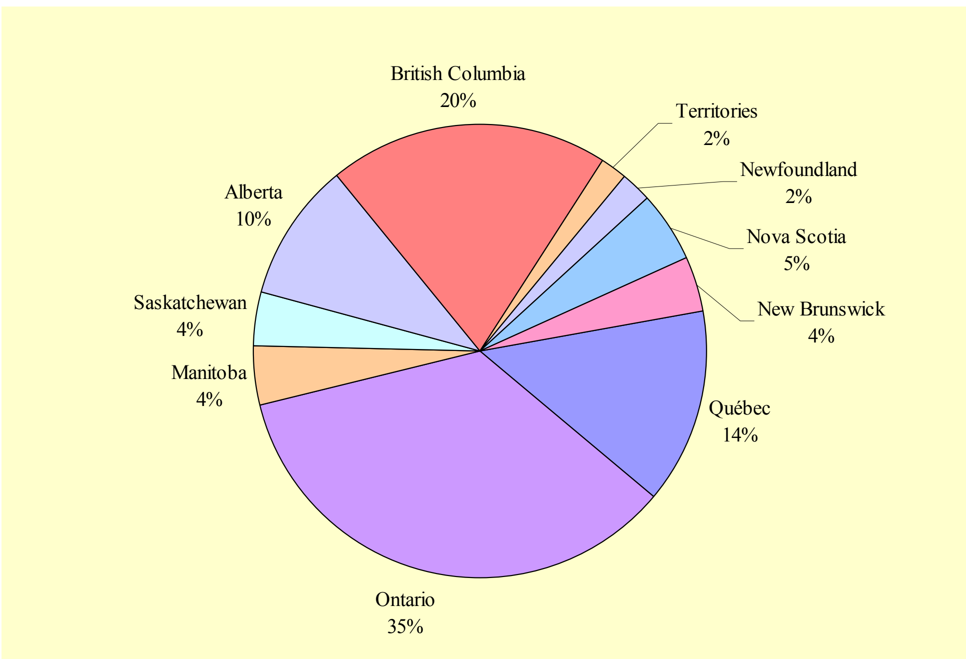
The crafts sector accounts for 16 percent of the employment of the Canadian cultural workforce. Crafts is the only employment category in the cultural sector that experienced a decline in the number of workers between 1991 and 1996. Annual incomes of full-time craftspeople are only 45 percent of average annual incomes of those employed in other cultural sectors (Canada Council for the Arts, 1999).

The BC Crafts Sector Survey (Winram, 1999) revealed that 37 percent of the 491 respondents devoted full-time hours to their crafts businesses, another 43 percent produced crafts on a part-time basis, and the remaining 20 percent were seasonal or occasional crafts producers.

An analysis of Statistics Canada's census data was performed for the CMAQ by a group headed by Vincent Sabourin of the University of

Québec in Montréal (1999). We present some of the main findings from this report in the following pages.

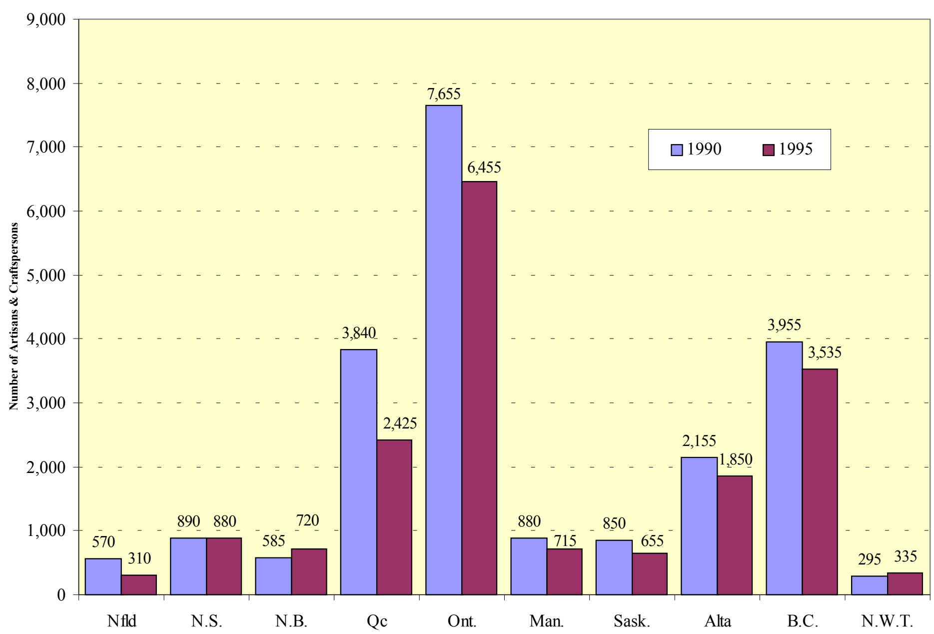
Figure 1: Provincial Distribution of Artisans and Craftspersons, 1995



Source: Statistics Canada, 1996 Census.

- Ontario, BC, and Québec combined have 69 percent of the Canadian total classified to the Artisans and Craftspersons occupation.

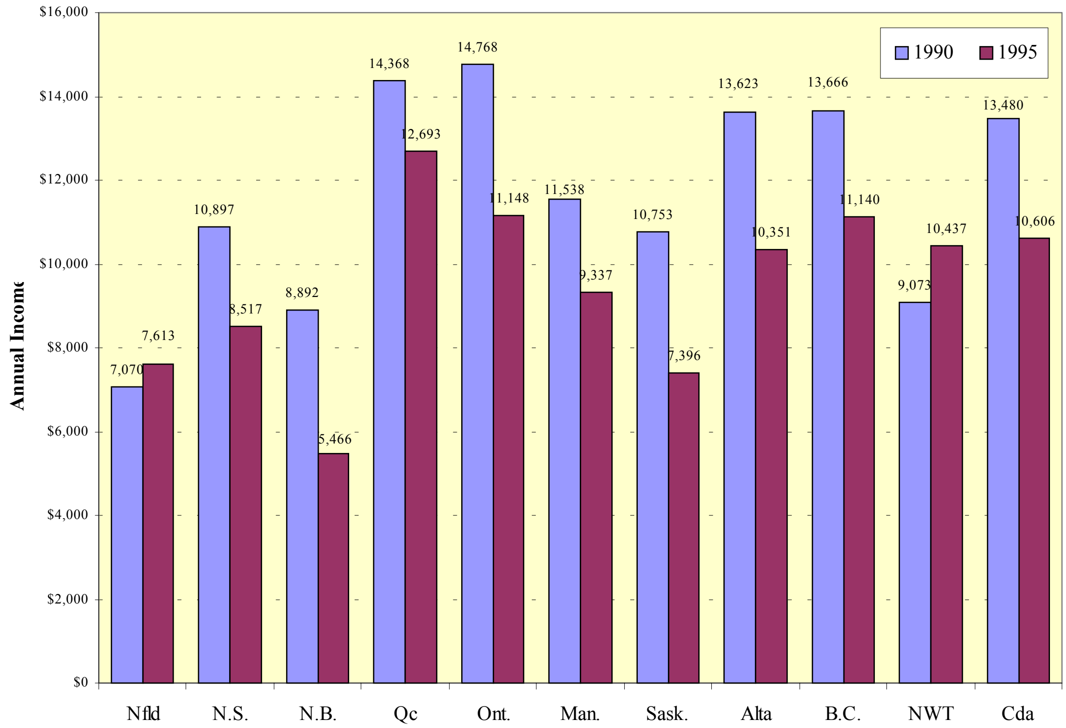
Figure 2: Number of Artisans and Craftspersons by Province, 1990 and 1995



Source: Statistics Canada, 1991 and 1996 Censuses.

- Between 1990 and 1995, the number of artisans and craftspersons went from 21,860 to 18,055, a drop of 17 percent over the period;
- Those most affected by this drop are Newfoundland (46 percent), Québec (37 percent) and Saskatchewan (23 percent);
- The greatest percentage drop occurred in Québec (4 percent), whereas B.C. increased its share of artisans and craftspersons by 2 percent.

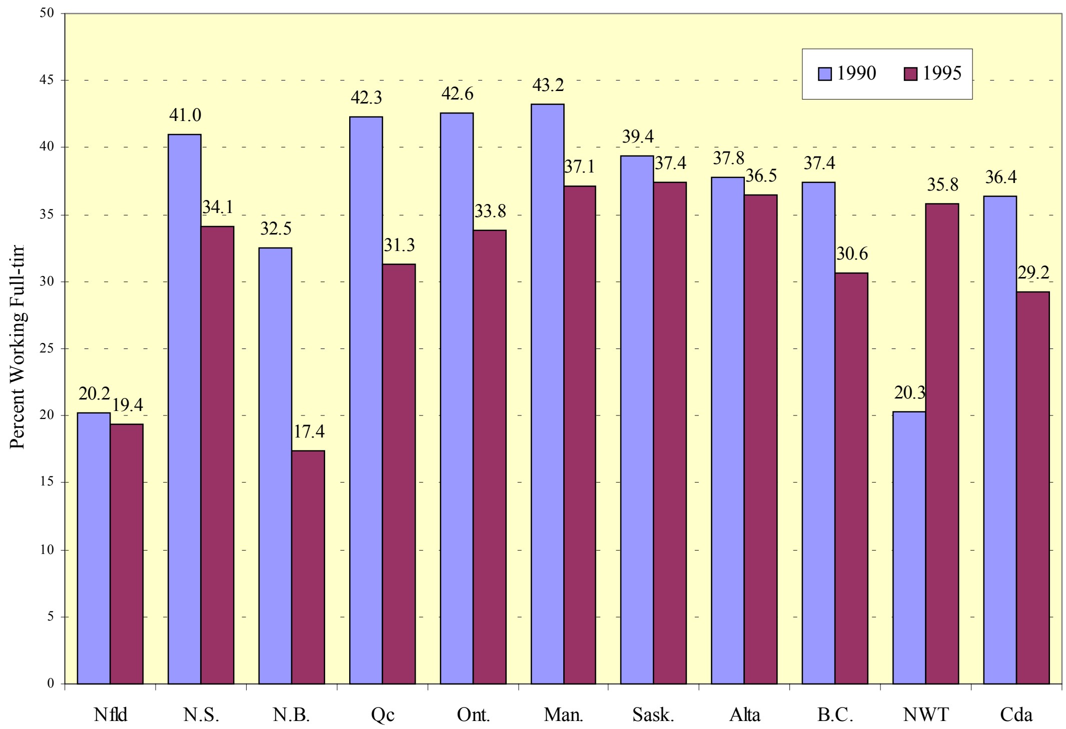
Figure 3: Average Earnings of Artisans and Craftspersons, 1990 and 1995



Source: Statistics Canada, 1991 and 1996 Censuses.

- Between 1990 and 1995, average earnings dropped by 21 percent (from $13,480 to $10,606);
- The provinces most affected by the decrease in average earnings are New Brunswick (39 percent), Saskatchewan (39 percent), Ontario (25 percent) and Alberta (24 percent).
- Quebec is the province with the smallest decrease in average earnings (12 percent).

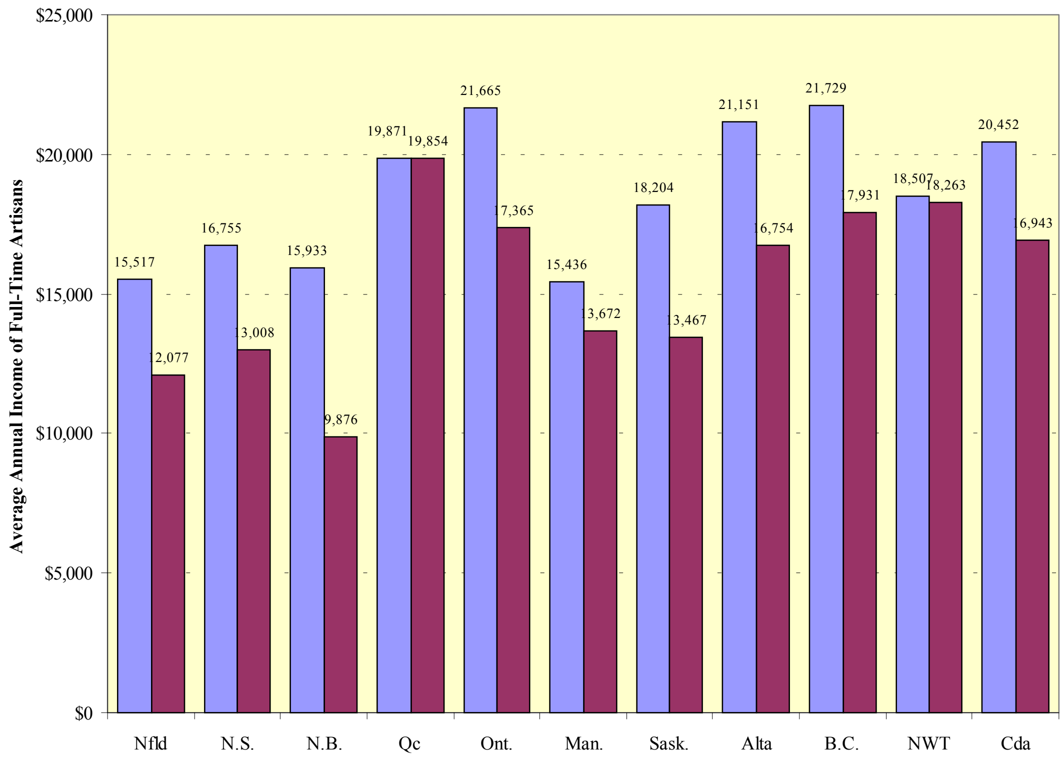
Figure 4: Percent of Artisans and Craftspersons Working Full-Time, 1990 and 1995



Source: Statistics Canada, 1991 and 1996 Censuses.

- Between 1990 and 1995, the number of artisans and craftspersons dropped by 33 percent (from 8,715 to 5,880);
- In terms of percent of people working full-time, the drop has been of 7 percent;
- New Brunswick (15.1 percent), Québec (11.0 percent), Ontario (8.8 percent), BC and Nova Scotia (6.9 percent) were the provinces with the greatest percentage drop in the number of artisans and craftspersons working full-time.

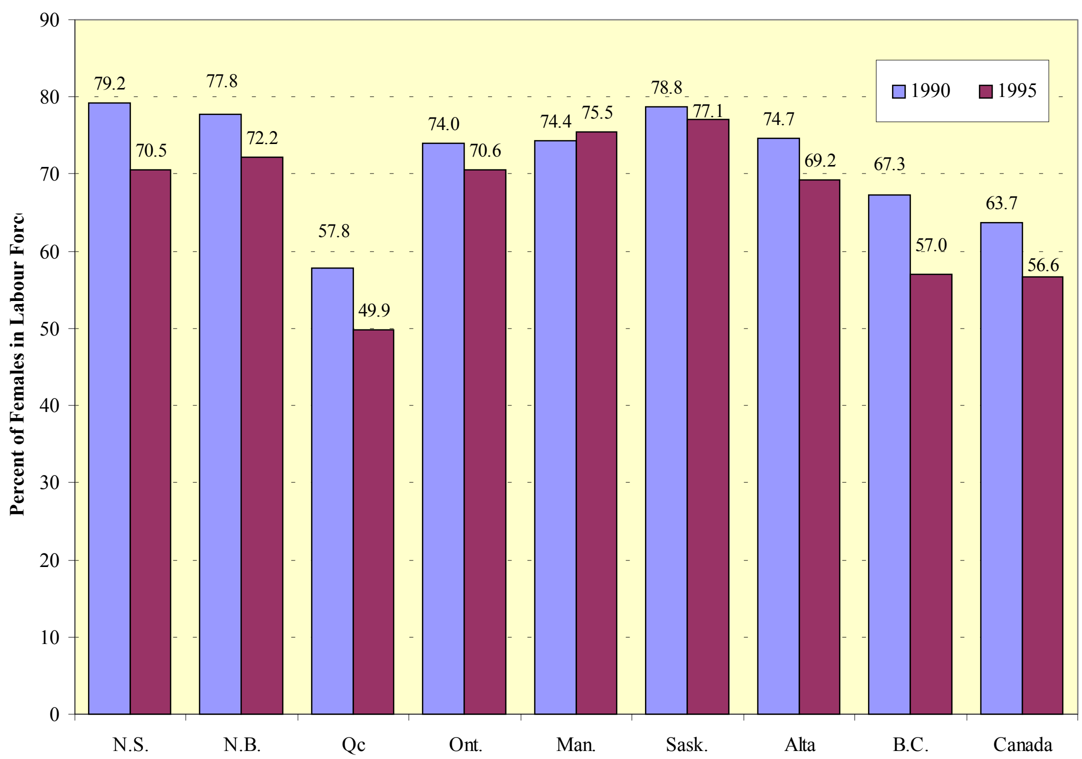
Figure 5: Average Earnings of Artisans and Craftspersons Working Full-Time by Province, 1990 and 1995



Source: Statistics Canada, 1991 and 1996 Censuses.

- Between 1990 and 1995, average earnings of full-time artisans and craftspersons dropped by 17.2 percent (from $20,452 to $16,943);
- New Brunswick (38.0 percent), Saskatchewan (26.0 percent), Nova Scotia (22.4 percent), Newfoundland (22.2 percent), Alberta (20.8 percent) and Ontario (19.8 percent) were the provinces where average earnings of full-time artisans and craftspersons decreased the most;
- Quebec was the only province that maintained its average over the period.

Figure 6: Proportion of Female Artisans and Craftspersons by Province, 1990 and 1995



+Source: Statistics Canada, 1991 and 1996 Censuses.

- Between 1990 and 1995, the percentage of artisans and craftspersons being women dropped by 7.2 percent (from 63.7 to 56.6 percent);
- The greatest decrease in the number of women working as artisans and craftspersons were in B.C. (10.3 percent), Nova Scotia (8.8 percent) and Québec (7.9 percent);
- Manitoba was the only province where the proportion of women in the occupation increased over the 1990-1995 period (1.1 percent).

1.3.2 Profile of Crafts Workplaces

A profile of crafts workplaces, like a profile of craftspersons, is hampered by statistical and definitional problems. Studies of the economic impact of the crafts sector tend to suffer from application of different definitions of the crafts workplaces. Some definitions exclude larger firms because the scale of activity appears to have moved away from crafts production and into mass production. Some studies include only full-time, professional activity; others include part-time and amateur production.

How the crafts sector is defined will alter the perception of the size and scope of the sector. For example, including very small business gives a very different picture of the viability of crafts enterprises, while excluding these businesses generates a much smaller estimate of the number of people involved in crafts.

With no comprehensive national study to establish definitions and document crafts activity in various provinces or regions, provincial crafts councils have struggled to pull together business profiles of the crafts sectors in their home provinces. These summaries obviously offer useful information, but it is difficult to compare statistics and descriptions of the crafts industry across provinces because of methodological differences.

According to a summary of provincial profiles produced by the CCF/FCMA (Guide Sommaire, 2001):

- The crafts industry of Newfoundland and Labrador is comprised of 500 businesses, employing approximately 2,500 people in either a full-time or significant part-time capacity, and generating $25 million in 1998. Markets include in province retail crafts fairs, approximately 165 crafts shops, and out of province sales to shops across Canada. Participation in trade shows, retail shows, and catalogue and Internet sales is widespread. Approximately 30 crafts businesses export outside the country, usually to the eastern US, and often with the service of a manufacturers' representative.
- Figures on size and composition of the Nova Scotia crafts sector are sorely needed -- the last statistical survey of the province’s crafts sector was done in 1984 and that only looked at the production crafts end of the scale. Combining the members the Nova Scotia Designer Crafts Council (NSDCC), the number of businesses participating in the Atlantic Crafts Trade Show or included in the Buyers Guide and those who appear on the Studio Rally map, and a best guess on who else is working out there who doesn't show up on any of those lists, produced an estimate of around 500 professional craftspeople/crafts businesses active in Nova Scotia in the year 2000. Of these, many are already

exporting outside of Nova Scotia, with fewer exporting outside of Canada. They represent all crafts media, and include both production and one-of-a-kind work.

- PEI has just completed a statistical overview of its handcrafts industry, but documentation only became available as this report was being finalized (Prince Edward Island Crafts Council, 2001, and Pinsent and Gabriel, 2001). Numbers of producing artisans range from full time to part time, senior to hobbyists (probably 20 full time to 150 or so, part time). A potential crisis is looming in the handcrafts industry, and it appears there is substantial unfulfilled demand in the marketplace for Island-made handcraft products. Because of the lack of training programs on P.E.I., individuals who have an artistic aptitude and/or are inclined to pursue the study of crafts are not able to do so in their home province.
- The 1998 BC Crafts Sector Survey (Winram, 1999) received 491 survey responses, but the report did not provide an estimate of the number of crafts businesses or crafts sector employees in British Columbia.
- Québec supports an estimated 1500 to 2000 jobs in crafts. More than 600 are professional artisans listed at the CMAQ. In addition to local crafts shows, and roughly 100 boutiques, 350 artisans participate in the Salon des métiers d'art, which generates annual sales of roughly $6.5 million, and accounts for 30 percent of the annual income of the average participant.
- Western Economic Development Canada supported studies of the crafts sectors in Alberta and Manitoba in the early-1990s, but these reports were not available for review during the short time frame of this study. (Alberta Craft Council, 1994 and McFall, 1994; the reference for the Manitoba study was not available at the time of the study).

Comparability of Data

Differences in crafts sector definitions can lead to very different and apparently contradictory conclusions on how the sector is developing. An example serves to illustrate this point. Sabourin (1999) reports that the Cultural Labour Force Survey showed the number of craftspeople working in Quebec grew from 9,800 to 13,000, an increase of 33 percent between 1992 and 1996. As reported in Figure 2 above, however, Census data indicated that the number of artisans and craftspeople in Quebec dropped from 3,840 to 2,425 between 1990 and 1995, a decline of 37 percent. Though the impact of the recession of the early 1990s may explain some of the differences in these sets of numbers, the fact that two sets of numbers indicate exactly opposite trends in employment over roughly the same time period is disconcerting.

Differences in definitions result in a confusing picture of crafts activity in Canada and the provinces because it is not clear whether observed changes in the number of businesses or employees are due to a difference in definition or a change in the economic health of the sector. The craft sector has recognized this problem. As Charles Lewton-Brain (1999) the crafts representative to the Canadian Conference of the Arts (CCA) notes,

> Crafts councils would like the CCF to push Stats Canada and other bodies doing surveys and generating statistics to do it in a way that produces numbers and information relevant to the crafts sector, to better allow it to develop and identify problems and strengths. Areas of interest include the size of the crafts sector, its economic impact, the numbers employed, primary and secondary economic and cultural effects.

To date, the sector has not had a significant opportunity to develop consistent definitions and a common approach to gathering statistics on crafts. The issue is not merely academic; consistent measurement of crafts activity is important for understanding changes in activity over time and the impact of programs and public investment in the crafts sector.

Business Viability

Sabourin (1999) reports that one third of Quebec crafts businesses had been founded within the past five years, and one third had been in operation for over ten years. Combined with the overall decline in the number of businesses suggests that there was a significant number of births and deaths among crafts firms.

Sabourin (1999) also notes that many crafts sector success stories include a family business history, and often, spouses or several generations work together to help the business succeed. Operating costs are reduced considerably with family businesses and they enjoy certain fiscal advantages. More importantly, however, family business allows people to put in time and energy without being constrained by short-term salary commitments to employees.

A 1999 study of the crafts sector in Quebec [Groupe de travail sur les métiers d'art, 1999) counted 652 businesses primarily involved in crafts production with the following characteristics:

- Two thirds have existed for over five years. 20 percent are between 6 and 10 years old, and 46 percent have existed for over ten years.
- Over 60 percent of Quebec craftspeople are self-employed. They either manage their business on their own, or use sub-contractors for some operations.
- Less than one third of Quebec artisans are at the head of a micro business employing between one and five people on a regular or temporary basis. Only 5 percent of crafts businesses total more than five employees.
- In Quebec, the average crafts business generates revenues of $69,000. Seven businesses out of ten make more than $50,000 worth of revenues, and 15.4% make more than $100,000.

In British Columbia, the CABC survey (Winram, 1999) showed that 88 percent of respondents had sold crafts work in 1997. Of those who had revenues, half had revenues of less than $5,000, including 23 percent with revenue under $1,000. Twenty percent of those with revenues indicated they received more than $20,000 in crafts sales, including 4 percent with revenue between $50 thousand and $100 thousand, and 3 percent with revenues over $100 thousand.

1.3.3 Availability of Education and Skill Training Programs

Crafts methods have traditionally been handed down from one generation to the next through formal and informal apprenticeships. Today, however all jurisdictions appear to have crafts programs delivered through colleges and arts schools. In general, however, we were not able to find a single compilation or catalogue of education or skill development programs in the crafts sector generally, nor for particular disciplines or material mediums. While most provincial councils, universities, and colleges have websites that provide this information, it was not within the scope of the study to compile these into a single Canadian source for crafts-related education and skills programs.

The BC Crafts Survey (Winram, 1999) showed that nearly two-thirds of respondents considered themselves self-taught, while 38 percent had received crafts training in universities or community colleges (respondents could select more than one source of training or education). Other notable sources of training included arts schools (25 percent of respondents, continuing education programs (24%), high school (23%), and apprenticeship/mentoring (21%). The same survey indicated that business skills training was mainly learned on-the-job, with 74 percent of respondents indicating this was how they learned these skills. Only

22 percent of respondents indicated they had acquired business skills through educational institutions.

Formal Education

Documentation of the availability of crafts training through formal educational channels is limited, though we expect that many colleges and universities offer programs relevant to development of crafts skills and business. Colleges of art tend not to include general training in business practice, despite the fact that many graduates will make their living as self-employed craftspeople.

The Groupe de travail sur les métiers d'art (1999) reports that in the Quebec college system, the DEC 573.01 in crafts technique is a professional program aimed at preparing students for the labour market and business practices. The program is designed to lead to a crafts practice and provides tools for creating self-employment situations. In Quebec, the Institut des métiers d'art - Cégep du Vieux-Montréal (Montréal) and the Centre de formation et de consultation en métiers d'art-Cégep de Limoilou (Québec City) are responsible for the implementation of the crafts training national plan adopted in 1984. Over ten schools-workshops ("écoles-ateliers") offer training in the crafts techniques (ceramics, music instrument making, fine woodworking or cabinet making, textiles, glass, jewellery, leather, etc.) while general education and business management training are offered in the Cégeps. Other training courses are offered outside the Cégeps and schools-workshops, either by crafts masters, or by other colleges and university institutions (fashion, design, industrial design, etc.).

Other Post-secondary institutions offering programs in crafts include the Nova Scotia College of Art and Design in Halifax, Concordia University in Montréal, and the Craft and Design Program at Sheridan College in Oakville, Ontario.

Lewton-Brain notes that the Saskatchewan Craft Council and craftspeople:

> are very concerned about arts and crafts education in the province (as is PEI). Courses eliminated recently include weaving and ceramics. In post secondary crafts education, they only have (at last count - they are not sure if they are still being offered):
>
> - University of Saskatchewan: sculpture, printmaking, photography
> - University of Regina: sculpture, clay, photography
> - SIAST Woodland Campus (community college): clay

The council wants to have more crafts educational options in the province.

Continuing Education

Our interviews with crafts sector representatives indicated that all provincial councils see continuing education or training programs for their members as an important part of their mandates. Though most of these programs are relatively informal and delivered outside the Canadian education system, they provide a range of skills and business training aimed at increased quality and business development. Examples of seminars include sessions on photographing crafts pieces, understanding small business taxation, and developing markets for crafts products. Organizations such as Harbourfront, and the Banff Centre for the Arts Courses also offer activities supporting craft development.

Charles Lewton-Brain (1999) reports that the Nova Scotia Designer Crafts Council coordinates a program of workshops where they bring in crafts masters to teach and share their skills. The aim is to encourage skilled craftspeople to share their knowledge.

According to Weinrich (2001), crafts producers in Canada are drawing on a wider variety of techniques and materials from around the world, supported partly by a growing number of specialized magazines devoted to crafts. Some techniques such as batik, plangi (tye and dye), niello and mokume (metal working), which were once restricted to specific geographical regions, are now found in many areas. Only a few crafts techniques such as 'ceinture fléchée' weaving are still restricted to small areas. Note that these techniques or practices relate to specialized and for some, very limited production. Nevertheless, access to information about what is going on technically and in terms of visual culture is very important.

While most provincial crafts councils have adopted a mandate to promote skill development and offer courses and workshops, there appears to be no national catalogue or inventory of these efforts. As a result, much of the training and skill development remains informal, uncertified, and largely unrecognized except as the skill is embodied in the products produced by craftspeople.

1.3.4 Assessment of the Profile of the Crafts Sector

The current information available does not provide an adequate foundation for government and private sector decision-makers to make informed judgements on an appropriate economic, trade, or cultural development action plan for the craft sector. Differences in methodology, definition, and time periods of analysis make inter-provincial comparisons difficult, and trends in the data difficult to discern.

Developing a more comprehensive profile of the crafts sector would be a significant challenge. Nevertheless, a comprehensive national study with provincial information and statistics could provide a clearer portrait of the crafts sector using a consistent set of definitions and categories of economic activity. Such a profile could draw on the strengths of past efforts, while avoiding some of the controversies and data issues that limit the usefulness of previous work.

1.4 Technology

Changes in technology have affected the crafts sector in at least two significant areas -- in production and in marketing and sales. Though mass production machinery is considered by most to be outside the bounds of the crafts sector, craftspersons are generally open to working with new or improved materials and production techniques that retain the character of handcrafting. Information technologies such as electronic catalogues and marketing methods are quite widely seen as a useful tool to expand markets or to increase repeat sales to past customers.

1.4.1 Impact of Technology on Production and Marketing

An increasing number of craftspeople promote and distribute their products using E-commerce. With respect to the crafts sector, E-commerce can meet some very specialized needs and can give a large quantity of information (texts and illustrations) at low costs.

Sabourin (2000a) notes that there are two types of Internet sites artisans can use: referencing sites and purchasing sites. The purpose of a referencing site is to refer and promote craftspeople as designers. With these sites, the craftsperson generally keeps responsibility for distribution and marketing. Purchasing sites are currently experiencing an enormous growth. They take over the majority of functions related to distribution and marketing, leaving the creation and production functions to the artisan. By setting up virtual boutiques and galleries, purchasing sites transfer part of their business risk to wholesalers and to craftspeople, as well as to buyers. When dealing with such sites, artisans buy little or no inventory, seeking to obtain guaranteed sales, and they transfer delivery costs to buyers

According to Sabourin (1999, p.20), business on the Internet requires that uniform keywords in both English and French. Specialized sites that classify products by media -- such as glass, fur, or wood -- as well as geographic region should be encouraged. Such sites also provide information on the arts, crafts, art fairs, and on the evaluation of crafts products. Examples of such sites are Wide Arts Resources, Juried Online Arts Festival, Céramic Ressources and Artifrance. In most cases, however, artisans must create their own sites and assume certain representation costs, called "tag" costs (costs of linking to other sites).

Another avenue to sell products online is the use of specialized sales sites such as Guild.com, ToutUnObjet. Such sites allow users to order and pay directly via E-Commerce. The sites are generally responsible for security of data exchange, but also of the quality of products, return and reimbursement policies as well as product delivery. Other modes of selling products online include putting one's business on general reference sites, on general purchasing sites (large like Amazon.com, or smaller like Clic.net), and on wholesaler sites. All the above modes of doing business online are discussed more extensively by Sabourin (2000a).

1.4.2 Domestic and International Trends in Technology

Many factors will make the use of E-commerce increasingly interesting for the promotion of crafts. In most industrialized countries, including Canada, telephone, cable and satellite companies compete with respect to E-commerce. The number of different technological platforms complicates the logistics between markets of different countries. Economic and commercial pressures will promote the emergence of a world standard within the next couple of years. Moreover, standards for ensuring the security of transaction are currently under negotiations. There should be a common protocol developed for major industrialized countries before 2002.

E-commerce of crafts products is currently subject to severe limitations in the areas of Internet networks and infrastructure. Sabourin (2000a) notes that these limitations lead to long waiting times, which may discourage users and may even reduce the use of Internet. The development of optical fibre networks for cable distribution will improve the speed of transmission and reduce waiting times.

1.4.3 Assessment of the Information Technology

The ambivalence of much of the crafts sector toward new technologies may be one reason for the lack of a significant discussion on new tools, new machinery, or new materials in the crafts sector. Some believe that technology may well destroy the nature of crafts production, while others see new processes or equipment as essential, and technology should be used in the ongoing evolution of crafts technique.

In any case, the cost and uses of technology in Canadian crafts is not widely documented, making it difficult to assess the degree to which technology is driving innovation or demand for new skill development in the crafts sector. We were not able to find a balanced assessment of the advantages and disadvantages of the use of technology to develop and promote the sector. Failing to take advantage of information technologies will likely hinder development and promotion of Canadian craft products domestically and internationally.

1.5 Business Environment

We found relatively little material writing about the overall market conditions for the crafts sector in Canada. Certainly there is no consistent data series on sales of crafts products, so it is difficult to determine the significance of the crafts sector contribution to the economy. Some markets, like musical instruments, "arts de la table," art furniture, jewellery, art-to-wear, ceramics, glass and metal, are characterized by high prices, low volumes and targeted clientele. Such markets are not very large in Canada, but have a certain potential outside Canada.

Historically, crafts have not been protected from international competition through trade barriers, as were other cultural industries. Craft products from other nations flow into Canada on the same terms as manufactured goods, both low-end and high-end. Recent trends suggest, however, that crafts are increasingly regarded as a cultural industry.

1.5.1 Business Trends in Canada and Abroad

Markets in crafts are traditionally seen and mainly categorized as relatively low cost gift items, but this obscures the fact that there are actually many markets organized by theme or discipline. Identifiable markets include religious objects, art-to-wear, sculpture-to-wear, art-furniture, or ceramics, jewellery, among many others. The focus on the tourist and gift market obscures the reality that the highest prices and greatest value-added, as well as most renowned works are found in these specialized markets.

Sabourin (1999) discusses a number of important business trends in Canada's crafts sector.

- One of the trends in the crafts market is the increasing specialization of craftspeople in only one or in a few market segments. This represents a major change, since a large number of artisans have traditionally been generalists. Craftspeople are increasingly focusing on their strengths in creating and producing, while leaving to the retailers the tasks related to sales and promotion. Another trend is the increase in the geographical scale of the craftsperson's activities.

- In high-end crafts, Canadian producers are competing with goods from several countries, especially France and Italy. Business trends include: the promotion via crafts fairs; inventory management; timely delivery to wholesalers and retailers; the standardization of delivery logistics; terms of payment for retailers; sales conditions; self-promotion of artisans; press relations; merchandizing techniques; export to American and European markets; quality improvement of crafts at the artistic and functional levels; price discrimination by distribution channels; and refinements in the price structure of crafts to interest marketing middlemen.
- There are five major market segments in the crafts industry: the tourist segment, the gift segment, the boutiques and galleries segment, the catalogue sales segment and the electronic catalogue sales segment. The electronic catalogue sales (E-commerce) is an emerging segment. The tourist segment should grow the most in the next ten years. In Quebec, growth can be partially explained by growth in American and European tourism, largely due to a low Canadian exchange rate; demand for crafts products is also increasing.
- The gift segment has become an important segment for craftspeople, particularly in Quebec. The segment covers its fixed costs and gifts are considered in themselves efficient promotional tools. It is a varied segment where high-end, average and low-end products are to be found, in almost all mediums.
- In general, available retail space is growing, but not as fast as the number of artisans is. One of the fastest growing niches in the boutiques and galleries segment is that of museum shops. This niche benefits from growing tourist demand.
- The catalogue sales segment is experiencing a large growth in North America. While this segment is under-developed in Quebec, it is growing fast in the United States, largely due to the aging of the population. Products found in this type of catalogue include items as varied as hand-made imports, giftware and jewellery.
- In several Canadian regions, craftspeople join forces to sell their products via an Internet site that acts as an electronic catalogue.

- An interesting concept that appeared recently in the United States is the "craftory." It refers to the practice where people either produce themselves in small amounts or get a larger workshop to produce products under the supervision of a team of craftspeople.
- An increasing number of artisans in the major American and some Canadian cities are working out of their home lofts. Lofts are generally located in revitalized downtown areas that facilitate access to retail opportunities. Lofts are economical for craftspeople by allowing them to earn a living from their crafts while enjoying low operating costs and supportive living arrangements in an interesting part of the city.
- Another trend is the production of small production lines, produced inside or outside the artisan's workshop. This type of production provides several craftspeople with the opportunity of earning a living while at the same time allowing the originator more time in the development, rather than in the production, of crafts.

The crafts sector is firmly rooted in traditional products and production methods, but it also changes to reflect advances in processes, materials, and crafts technique. There are clearly opportunities to be explored in a wide variety of products, mediums, and markets.

1.5.2 Marketing Canadian Crafts to Canadians

This literature review offers very little information about characteristics of the marketing of Canadian crafts, other than in Quebec. Most provinces support local and regional crafts fairs and shows, but not all crafts products would be marketed in this way.

According to a Price Waterhouse (1991) study cited in an *Export Strategy* by the Groupe de travail sur les métiers d'art (1999), direct sales are the marketing mode most used by Quebec craftspeople. Success depends on the participation at crafts fairs and exhibits, as well as on sales at studios or workshops. For a lot of artisans, direct sale is the only marketing method they use. Selling at crafts fairs is the favourite method of craftspeople because, in such an environment, they feel protected from the competition of industrially produced goods and they can distribute their products without middlemen. Craftspeople can also sell their products in boutiques and galleries specialized in crafts or in regular boutiques where their products have to compete with industrial objects.

Some of the greatest success stories involve artisans who continue, even after 25 years in the crafts business, to assume in whole or in part the work of representation and product distribution. At the moment, it is not economically feasible to start a crafts business by giving this work to a third party, because commissions, normally 15% of the selling price, will not be sufficient to allow an agent to earn a living. In addition, many crafts products require a direct and personal approach because of the specialized knowledge of the originating craftsperson.

Sabourin (1999) notes that a distribution network in the crafts sector takes between three to five years to mature. Creation of such networks requires perseverance, but the payoff can be considerable. One of the most interesting strategies for marketing crafts is the efficient use of relationships with the press. This strategy, which essentially means sending press kits, contacting journalists and making interviews and articles on new crafts collections, is much more profitable than the purchase of advertising space or time.

1.5.3 Developing Export Markets for Canadians

The *Export Strategy* of the Conseil des métiers d'art du Québec (1999) described the situation prevailing in the sector in the following way:

> Canada is late in its commitment to the crafts sector. The domestic market is dominated by French and Italian crafts for the high end (such as jewellery, art de la table, fashion), and Asian or other European producers for low end including tourism and souvenirs. Canada is virtually absent in the international crafts world.

Sabourin (1999) suggests that growth in the crafts sector will likely depend on increasing export opportunities:

> Exporting crafts to American and European markets has become an essential strategy in the development of the Canadian crafts sector. Crafts sales to the United States now represent 8 percent of total revenues from crafts in Quebec. In general, exporting to the United States is the fastest way to increase revenues in the short and medium term, while making the crafts industry more competitive. Market density combined with favourable exchange rates mean a much larger sales potential in the United States than in Canada.

Sabourin (2000b) notes that graphic arts, fur products and jewellery represented 89% of the $218 million in Quebec crafts sales to the United States in 1999. The largest importers of Quebec crafts after the United States are Italy, Japan, and Switzerland. However, the value of Quebec crafts exported to the United States is 10.5 times higher than that of the other international markets combined.

In recent years, many provincial crafts councils have developed strategic plans that include goals and objectives for improving crafts marketing opportunities. Where councils are not active in, or have no current plans for, export market development, they are usually interested in working on a long-term strategy with other councils. The *Guide sommaire* (2001) provides detailed information about exports at the provincial level:

- The Crafts Association of BC participated in an EXTUS mission to the San Francisco International Gift Show hoping to find more information about border policies, pricing, and costs of participating in shows.
- A small number of members of the Saskatchewan Craft Council have U.S. buyers/dealers.
- In Quebec, CMAQ is continuing its 5-year effort to develop crafts markets in Italy, France, United Kingdom, as well as the US. Other provinces currently prefer to limit their export focus on the US. The support of the Quebec government for crafts export development efforts is not mirrored in any other province. Next year, the CMAQ will launch a fully transactional provincial web site with business-to-business (B2B) and business-to-consumer (B2C) capability. More than one hundred Quebec artisans export on a regular basis, via representative or directly to customers, collectors, boutiques, or galleries.
- In Prince Edward Island: “Very few artisans would be exporting at this time and others do not have the product to export (since) …there is a shortage in the marketplace at home.”
- In Nova Scotia, the “Atlantic Crafts Trade Show (primarily for production crafts and giftware producers)” attracts a number of US buyers
- The province of Newfoundland and Labrador is one of the four partners in the Atlantic Trade Winds Agency operating from Bedford, Mass. This is a showroom based in a centre for manufacturers' reps; the objective is to find New England based reps for Atlantic Canadian crafts businesses. This is less successful for Newfoundland and Labrador than for other Atlantic Provinces, as most of the businesses from this province that are close to export-ready are apparel businesses, and less appropriate to the marketplace to which this project is directed. A number of apparel businesses attend shows in the U.S. - California, Las Vegas, New York. There are a few crafts businesses, especially Aboriginal makers, who sell in the US - either through traveling to many shows or by selling all their work through a single gallery. A number participated in the

> Spirits in the Sun event in 1999. Many Newfoundland and Labrador crafts businesses participate in the Atlantic Crafts Trade Show. This show works to bring in US buyers. Many crafts businesses here have found US accounts this way. On occasion, they have even had Japanese buyers."

In another internal document entitled *"Re: Development of a National Strategy*", Claudia Bergen (1999) describes the Manitoba export initiatives as follows:

> "Some of the members of the Manitoba Crafts Council market to the USA through galleries with one of a kind items and there are others who are interested in pursuing this route with help in the process. Two members have participated in the Rosen Show in Philadelphia using a PEMD grant, one found it a positive experience the other felt it was not the right venue."

1.6 Sector Initiatives

Since the crafts sector is characterized by a large number of small workplaces, joint activities through local or provincial councils and national federation are essential for the development of the sector. While the situation is improving, resource constraints have made it difficult for various organizations in the sector to cooperate through shared information, decision-making, strategic planning, and joint activity.

1.6.1 Federal Level

The CCF/FCMA is a Canadian, non-profit organization composed of the ten provincial crafts councils whose mandate is to support the development of crafts in Canada. The ten provincial councils are:

- Alberta Crafts Council (ACC)
- Crafts Association of British Columbia (CABC)
- Manitoba Crafts Council (MCC)
- New Brunswick Crafts Council (NBCC)
- Nova Scotia Designer Crafts Council (NSDCC)
- Crafts Council of Newfoundland and Labrador (CCNL)
- Ontario Crafts Council (OCC)
- Prince Edward Island Crafts Council (PEICC)
- Conseil des métiers d'art du Québec (CMAQ)
- Saskatchewan Crafts Council (SCC)

The Federation acts through advocacy, policy initiatives and programs. As the only national organization devoted solely to crafts, the Federation is responsible for coordination of national committees and projects, and information sharing with member councils. The CCF/FCMA is a useful avenue for communication nationally. Its board consists of representatives (usually the executive director or president) of each of the ten provincial crafts councils.

In an internal document on the crafts sector Charles Lewton-Brain (1999) reported on CCF/FCMA concerns in a number of areas. In his detailed review of these concerns Lewton-Brain notes:

- “Crafts people nationally are very concerned with access to US markets. Difficulties have been experienced transporting goods into the US for legitimate trade shows and some (Nunavut, Newfoundland) are concerned about wildlife product restrictions and the effect on export options for crafts people. US immigration has handed out lifetime bans to a number of Canadians and is otherwise difficult to get along with. Americans still appear to be able to lecture and give workshops far more easily in Canada than Canadians into the US, so border transparency remains an Issue for Canadian crafts people, particularly in regard to lecture and workshop opportunities. The CCF/FCMA has called on the Canadian Government to request the US to allow 'temporary working visas or work permits under NAFTA to Canadians participating in workshops, seminars and retail crafts fairs. Most crafts councils expressed concern about border issues.”
- “The disparities in funding are also extreme across the country, with some organizations having 20 or more employees and large budgets and others getting by with totally volunteer staff and minuscule government contributions.”
- The Crafts Council of Newfoundland and Labrador “has some concerns about regulations on animal parts as far as access to Southern Markets goes (as do the craftspeople in Nunavut)”
- The P.E.I. Crafts Council’s concerns include: “ Not many young craftspeople replacing older ones, and potentially insufficient crafts objects being produced to meet the retail demand for them locally. There is no long-term training available on the Island, and little provincial government support for crafts education. Their funding has remained unchanged for eight years, and this limits the council's ability to undertake new projects.”

- Concerns at the CMAQ include " border problems for their members, delays (or hours or days) in taking goods through for trade shows and other complaints. They are concerned that NAFTA is not being applied in ways that are equal for craftspeople, and feel that it is too complex and difficult to take work to shows and exhibitions in the US, echoing BC's complaints."

Charles Lewton-Brain (1999) also reported the following actions taken by individual provincial associations and councils to develop the crafts sector:

- Projects at the Crafts Association of British Columbia (CABC) "include the creation of a website and new database for BC crafts professionals with member service information and educational content, funding sources, sales opportunities, galleries, suppliers etc."
- The Manitoba Crafts Council (MCC) people are "in possession of a truly significant historical collection of crafts from the region. Their disastrous flood last year damaged some 20-25% of the collection, but most of the damaged works are being restored. They are in early negotiations to obtain a marble-pillared bank building near Portage and Main to house the crafts council and its museum collection. The collection is unique in that 95% of craftspeople collected were immigrant women and thus the works deal with the early history of women in the province. There are many textiles, some aboriginal works."
- The Craft Council of Newfoundland and Labrador (CCNL) "continues its active exhibition and retail activity. There is a real concentration and interest in export market development. The Labrador Crafts Marketing project continues well."
- The Nunavut Arts and Crafts Association (NACA) is " working on a permanent public art gallery and museum in Iqaluit for Inuit art of all kinds, past, famous and contemporary. … There is a "Sealskin Booklet" available to raise awareness about sealing and the use of seal pelts. A task force on the carving industry has been formed. … They are involved in a project to allow Arctic products involving animal parts to be sold outside Canada."
- The Ontario Crafts Council (OCC) is "involved with the development of marketing strategies for the crafts sector. Discussion partners include the Department of Foreign Affairs, Canadian Heritage and the Canada Council for the Arts."

- The Saskatchewan Craft Council “has a strong exhibitions program with eight a year and 3 travelling shows. It has a public gallery, unusual for most crafts councils who often combine their exhibition program with a crafts sales space.”… “The council's magazine *Crafts Factor*, published twice yearly, won the "Saskatchewan Magazine of the Year" award. A very successful 'Collaborations' conference was held in August 98 with participants from Canada, USA, Australia, France and other European countries (called 'Emma Lake' by most participants). The conference has become a major influence in the international wood working world today in terms of wood turning practice and furniture design, even impacting practices in educational institutions and in other media such as small metals and fibres.”
- The Conseil des métiers d'arts continues to be a model for other councils nationally. Their fund raising and project organizing abilities are the envy of many. CMAQ is also deeply involved with several groups and cultural coalitions, some aimed at lobbying for increased funds for the arts. One is a conference of all the cultural events in Montreal. Their magazine remains a lovely example. They are involved with a number of export projects and projects that showcase Quebec artisans in the USA and further a field.

From 1994 to 1997, Department of Foreign Affairs and International Trade (DFAIT) and the Program for Export Market Development - Trade Associations (PEMD-TA) allowed five high-end Canadian crafts galleries to participate in the prestigious Sculpture, Objects and Functional Art (SOFA) show in Chicago. This important support and participation allowed the crafts sector to confirm that there were export markets for high-end Canadian crafts, and that these were organized along theme or medium lines. Development of significant sales took three to five years, as it took this long for the galleries and the artists to become known by important collectors attending the SOFA shows in Chicago and New York.

A PEMD-TA Working Group composed of representatives from British Columbia, Newfoundland and Labrador, Saskatchewan, Alberta, Manitoba, Quebec and Ontario, is developing a national approach to export market development for Canadian craft, with the support of DFAIT. In addition, DFAIT has supported ongoing research via craft market studies for a number of important foreign markets as indicated in the bibliography.

In 1995, an Arts and Cultural Industries National Sector Team was created by the Canadian government to assist in pursuing international business opportunities for the cultural sector and to develop the Arts and Cultural Industries International Business Strategy. In the Team's document (Arts and Cultural Industries National Sector Team, 1999), the strategic direction was described as follows:

> The government, in co-operation with the industry, will:
>
> - Continue to pursue an effective cultural advocacy campaign in the United States, Europe and at home to ensure that Canada's policies for cultural industries are understood and supported by DFAIT and the Department of Canadian Heritage [DCH];
> - Ensure that participation in key international fairs, festivals and markets does not diminish but increases, wherever possible, since they offer an effective way to promote Canadian cultural products, gather market intelligence and establish contacts with foreign business partners (DFAIT, DCH);
> - Through development of appropriate training programs, ensure that Canada's foreign service officers and trade commissioners abroad are able to adequately promote Canadian arts and culture, and provide export assistance to Canadian companies (DFAIT, missions);
> - Consider extending export and financial assistance, and other support measures, to multimedia content to ensure that Canadian voices are not excluded from the information highway, and that the cultural industries can effectively compete in this important new market (DFAIT, DCH, Industry Canada [IC]); and
> - Gather better statistics on this sector, especially with regard to foreign revenues and sales (DFAIT, DCH, IC, Statistics Canada).

Since 1995, there has been some progress in building working relationships and contacts, but relatively little in concrete progress toward objectives. DCH is currently working with committees of the cultural industries to develop a sector profile and action plan. The means and ways of accomplishing these objectives are still under discussion. The crafts profile and action plan will allow government and other key actors a fuller appreciation of the reality and potential of crafts, and should assist in the creation of a structured and meaningful strategy of support for the development of the sector, both nationally and abroad. Work on the profile and action plan is expected to begin in the spring of 2001.

1.6.2 Provincial Level

Every province of Canada has a crafts organization with a mandate to support the development of crafts activity in the province. These organizations typically receive some provincial funding, in one form or another, though not necessarily directly from the provincial government. According to most observers, the government of Quebec has shown the greatest interest in crafts, backed with significant support for research studies and market development. In Ontario, by contrast, there is now no direct funding for the Ontario Crafts Council.

In the western provinces, government funding for crafts is typically provided through arts councils, while the Atlantic Provinces seem more likely to see crafts as an economic development opportunity associated with tourism. While resources vary considerably, however, each provincial organization has a significant foundation for expansion and for participation in joint national initiatives for the promotion of crafts domestically and internationally.

Quebec

The Quebec government cultural policy adopted in 1992 gave the Conseil des Arts et des Lettres du Québec (CALQ) the responsibility to design and implement a specific program to promote projects in visual arts, multidisciplinary arts, multimedia, literature, performing arts, variety, crafts and architectural research. CALQ provides grants to individual craftpersons as well as other artists, but the organisational support excludes crafts organizations. This cultural policy gave the Société de développement des entreprises culturelles (SODEC) a mandate to study four cultural industries including crafts. Crafts organisations receive no support from CALQ, only from SODEC. SODEC also supports individual projects of artisans or studio or business partners of a business nature. (Conseil des métiers d'art du Québec, *Mémoire,* 1999, see alos SODEC documentation).

In the fall of 1997, a Working Group on Crafts with about fifteen stakeholders as members was created to provide the crafts sector with a strategic development plan. A number of factors served to bring the key players in the crafts sector in Quebec to develop an action plan for supporting the economic development of the sector (Groupe de travail sur les métiers d'art, 1999). The creation of SODEC and of la Commission des métiers d'art (a commission of la SODEC); the reduction in credits from SQDM (now Emploi-Québec); the CMAQ efforts on market development, and the impact of new technologies on production and marketing methods contributed to the joint effort. The group engaged 300 craftspeople, teachers, distribution agents and government officials in consultations on topics related to creation, research, training, production and marketing. Their findings were published in *A Strategic Plan for the Economic Development of the Sector.*

Quebec also has a government programme dedicated to the marketing of cultural products outside Quebec, called Sodexport, that is administered by SODEC (Groupe de travail sur les métiers d'art, 1999). For artisans wanting to export, CMAQ's Web site provides an export guide with useful information with respect to the development of an export plan, the intellectual property of products, market studies, pricing, distribution channels, transportation, customs, financing, advertising and promotion (Department of Foreign Affairs and International Trade and Quebec Ministry of Culture and Communications, 1999).

The Conseil des métiers d'art du Québec (1999, Toward and Export Strategy) has worked extensively to develop foreign exports of crafts products. The Bureau d'exportation (export bureau) was created with the support of Ministère de l'Industrie et du Commerce to act as a facilitator for crafts workshops, as well as an arts and crafts gallery and specialized crafts boutiques. The CMAQ has undertaken market studies to coordinate the efforts of its export bureau and artisans workshops.

In each of the last five years, CMAQ has been involved in about twenty export projects with the United States, France and Italy. There are ongoing discussions on potential new projects. International activities in Montreal are planned before 2005. CMAQ's strategy for the development of international markets is articulated around the notion of thematic markets (e.g. art jewellery, artistic furniture, "arts de la table") and disciplinary markets (artistic glass, ceramics, precious metals), the promotion of excellence and the increase in visibility, reputation, and sales.

CMAQ hopes to increase the presence of Quebec crafts on international markets. It has a program of internships training activities inside and outside of Quebec to help craftspeople get involved and succeed in export development. In the last three years, thirty young people from different background (management, international trade, marketing, communications, visual arts, art history and crafts) have completed 18 craft-related market studies and mission reports under an international training program for youth (MAECI-PSJ/ DFAIT - Youth Internal Internship) (Conseil des métiers d'art du Québec, *Réalisations*).

Quebec sought to partner with other provincial councils in developing a Canadian export strategy. In 2000, the CMAQ proposed to the CCF/FCMA that the provincial crafts councils "constitute a working group specifically for export, and get involved in a lobby strategy in order to get for the crafts sector the same kind of federal resources as other cultural sectors." This proposal led to the formation of the PEMD-TA working group.

Newfoundland and Labrador

The Craft Council of Newfoundland and Labrador works in partnership with the federal and provincial governments in supporting the provincial crafts sector via a Crafts Industry Development Program. Different levels of support are offered to crafts enterprises, based on their stage of development (Craft Council of Newfoundland and Labrador, 2000).

Nova Scotia

Still at the regional level, the Nova Scotia government launched a new program to encourage export development in its rural areas. This initiative may have an impact on crafts businesses willing to export (*Guide sommaire*, 2001).

British Columbia

Assisted by the Crafts Association of British Columbia (CABC), the Department of Foreign Affairs and International Trade (DFAIT) produced a study of the US market for fine crafts. The study identified opportunities for Canadians to exhibit and sell their work, as well as providing information and contacts to help them access the U.S. market. The Canadian Consulate in Seattle also conducted a consumer survey of Canadian arts and crafts in the U.S. market. Consulate representatives interviewed galleries and storeowners to assess their interest in Canadian products (Masters, 2000).

Last year, the CABC published *Crafts Shows 2000,* another in its series of annual comprehensive lists of over one hundred crafts shows throughout B.C., across Canada and the United States.

1.6.3 Assessment of Sector Initiatives

Despite relatively little recognition from economic development ministries and the generally low levels of support for crafts from provincial culture or heritage ministries, crafts sector people have a strong history of working together as a community to promote their crafts and market their products. This could easily form a strong foundation for further work on a provincial and federal basis if only adequate resources could be provided.

Crafts businesses have not typically had the significant amount of cash required to facilitate joint activities across the vast distances of most provinces, let alone the country. With the growth of information technologies, however, funding for selective face-to-face meetings and networking could readily be leveraged into lasting cooperative projects and agreements.

1.7 The Profile of the Crafts Industry In the US

In April 2001, the Crafts Organization Directors Association (CODA) released the results of the first survey of crafts activity in the United States. Survey analysis resulted in an estimate of crafts activity in the US amounting to $US 13.8 billion in 1999, including a direct economic impact of between $US 8 billion and $US 10 billion. The survey estimates that between 107 thousand and 127 thousand craftspeople were active in the United States in 1999/2000.

In her comments of the survey CODA board chair, Carol Sedestrom Ross notes:

> We have never known how many people in the United States make handmade objects, how many crafts fairs take place annually, or how many galleries feature crafts. We knew the field was growing, as evidenced by dramatic increases in the number of crafts makers who earn their living through their work, and by the increasing number of selling venues and buyers. Still, the making and selling of crafts remained our country's biggest "invisible industry."
>
> "The CODA Survey: The Impact of Crafts on the National Economy" was designed to change that. By gathering individual data from crafts makers across the United States, the CODA Survey finally provides statistical proof that crafts make a significant contribution to the national economy.

Sedestrom Ross notes that the information provided by the survey will assist crafts organizations in demonstrating the economic value and viability of the crafts industry to government officials, helping ensure that the sector receives the same basic support as other industries. A similar case could be made for the crafts industry in Canada.

1.8 Conclusions and Information Gaps

Despite the best efforts of provincial crafts organizations, the available portrait of the Canadian crafts industry remains thin and patchy. Economic activity in crafts is not easy to extract from the standard sources published by Statistics Canada because of the unique character of the industry. Self-employment, employment in related fields, and part-time employment tends to lead to underestimates of the numbers of persons active in the crafts sector. A diversity of formal and informal retail channels tends to lead to underestimates of sales figures. While greater effort and analysis of existing data sources is likely worthwhile, perhaps the only way to get a true picture of the economic importance of the Crafts Sector is to conduct a survey along the lines of the recently released CODA survey in the United States.

While each provincial crafts organization can produce some estimate of the number of artisans or craftspeople in their jurisdictions, these data are difficult to compare because of differing definitions and the exclusion or inclusion of different industry segments. Further, data collection methods are not particularly well suited to assessing shifts in activity from one segment to the other, or general growth of particular segments. For those responsible for economic development, accurate data can help in building supporting infrastructure for activity clusters that could assist in skill development, group marketing efforts, and quality improvement.

Though the full text of the CODA Survey in the US was not available at the time this report was written, careful consideration should be given to using a similar methodology for a survey in Canada. Imitation in statistics is not merely sincere flattery, but it assists in creating comparable results across jurisdictions. Comparability allows industries to benchmark sales and employment growth against each other, and assists in the development of trade targets and other agreements. Under NAFTA, Canadian producers are entitled to have access to US markets, and vice versa, and accurate and consistent data on domestic markets and trade activity are important for monitoring progress or developments in this area.

2 Part 2 - Defining the Crafts Sector

One of the stumbling blocks to the development of a profile or survey for the crafts sector is the difficulty in achieving a common definition of what the crafts industry includes. In industries such as crafts, there can be long debates on whether one segment or another should be included or not. Often disagreements hinge on differing underlying needs or agendas. Consideration of what the data needs to be used for can sometimes resolve these conflicts. If the purpose is to demonstrate the economic size and importance of the industry, perhaps an inclusive definition is most useful. If the data is used to focus additional skill development and training activity, a more narrow definition of the industry might be preferred. Typically, the key consideration in data gathering is to be as inclusive as possible, and with appropriate identification of sectors or types of activity.

There are numerous definitions of what crafts disciplines should be considered as part of the crafts sector. Part of the discussion focuses on whether or not the manufacturing of crafts on a large-scale should be included in the definition of the sector. While these debates can carry on for a long time, we need, in the short-term, a definition of the sector that will allow the Canadian Crafts Federation and the provincial crafts councils to examine data from a common standpoint. It is for this reason that we propose to limit the discussion to Statistics Canada's definition of the sector. We are well aware that this definition is not perfect, but it allows us to start our analysis with tangible data.

2.1 Statistics Canada Definitions

Because Statistics Canada data does not currently recognize the crafts sector as a specific industry, measurement of crafts output and impact on an industrial basis is very difficult. A more promising avenue is to define the sector in terms of occupations, allowing some measure of employment and incomes associated with crafts. Even an occupational analysis of crafts activity using Statistics Canada data, however, faces significant challenges.

The 1991 Standard Occupation Classification under Artisans and Craftspersons (SOC F144), the definition offered by Statistics Canada, is as follows:

> Occupations in this unit group are primarily concerned with using manual and artistic skills in designing and making various crafts objects, such as jewellery, ornamental objects, pottery, stained glass, rugs and woven fabrics. Makers of handcrafted stringed musical instruments, hand bookbinders, and crafts teachers *(vs.*

Higher) are also included in this unit group. Painters, sculptors and other visual artists are classified in unit group F036 - Painters, Sculptors and Other Visual Artists. Machine operators and assemblers who produce similar objects in manufacturing are classified in the appropriate unit group of broad occupational categories J - Occupations Unique to Processing, Manufacturing and Utilities, and H - Trades, Transport and Equipment Operators and Related Occupations.

The most common titles are the following:

- Art-glass designer
- Artisan
- Arts and crafts teacher
- Basket weaver
- Bead worker
- Bookbinder, hand
- Canoe craftsman/woman
- Carver
- Ceramic artist
- Crafts instructor
- Crafts weaver
- Crafts teacher
- Craftsperson
- Crocheter, hand
- Dollmaker
- Enamellist, artist
- Engraver
- Glass blower
- Glassware maker, hand
- Goldsmith
- Goldsmith's apprentice
- Guitar maker
- Hand bookbinder
- Hand knitter
- Hand quilter
- Hand spinner
- Lapidary, except jeweller
- Lapidary's apprentice, except jeweller
- Leather crafts worker
- Metal arts worker
- Musical instrument assembler, hand-crafted
- Needleworker, hand
- Potter
- Rughooker
- Silk flower maker
- Silkscreen artist
- Silversmith
- Stained glass artist
- Stained glass painter
- Violin maker
- Weaver, craft

The above is a sample list, so not all job titles included in the occupational title ‘Artisans and Craftspersons’ would be listed here.

(See Appendix A for a list of French jobs titles and Appendix B for crafts media categories.

Other occupations where one is likely to find crafts workers are in Theatre, Fashion, Exhibit and Other Creative Designers (SOC F143).

> Occupations in this unit group are primarily concerned with creating and producing designs for theatre, clothing or exhibits and displays. Also included are other occupations in design that are not elsewhere classified. Interior designers are classified in unit group F142 - Interior Designers. Graphic designers are classified in unit group F141 - Graphic Designers and Illustrating Artists.
>
> Examples of titles in Theatre, Fashion, Exhibit and Other Creative Designers occupational group include:

- Clothes designer
- Costume designer
- Couturier
- Dress designer
- Embroidery designer
- Exhibit designer
- Exhibition and display designer
- Fashion designer
- Fur designer
- Garment designer
- Handbag designer
- Hat designer
- Lighting designer, theatre
- Memorial designer
- Millinery designer
- Museum display designer
- Office space planner
- Retail space planner
- Rug designer
- Set designer
- Shoe designer
- Stage-scenery designer
- Textile designer
- Theatre set designer
- Trade show exhibit designer
- Window designer
- Women's apparel designer

2.2 Other Definitions in Use

In the province of Quebec, the definition of Crafts has been embodied in law. According to Sabourin (1999), Loi S 32.01 in Quebec defines crafts as (authors' translation from French):

> The production of original pieces, unique or in several copies, aimed at a utilitarian, decorative or expressive function and is

related to the transformation of wood, leather, textiles, metals, silicates or any other material.

We are unaware of a definition of the crafts sector being included in any other federal or provincial legislation.

The Conseil des métiers d'art du Québec (2001) suggests that crafts products can be grouped into several theme markets, notably:

- The "arts de la table" market
- The gift market
- The art furniture and office accessories market
- The clothing, fashion and fashion accessories market
- The jewellery market
- The research and expression art market
- Crafts in architecture
- The book and paper market
- The performing arts market
- The interior design market
- The liturgical clothing and objects market
- The music instruments making market.

Traditionally, the crafts sector has been associated with the giftware sector. However, a larger definition of the crafts sector is now required. Aside from craftspeople participating to exhibits and fairs, some sectors have developed significantly both within and outside Canada. Let us take as an example the instrument-making sector which, based on the skills of its artisans and technicians, has acquired a solid reputation and good international sales. Another example is the ceramics and glass sector where large workshops have emerged. These are still maintaining a capacity for producing original pieces and high quality standards. (Groupe de management stratégique, 2000b).

2.3 Getting on With a Definition

Perhaps the most promising way to proceed to a working definition of the crafts sector is to avoid the question by including everything and allow data users to select the segments of the industry they find most appropriate. In some industries where there is a debate on what is and is not included, they have chosen to define their industry in concentric, overlapping, or adjacent rings. The core is the part of the industry that everybody clearly recognizes as in, and adding in circles where there is clearly related economic or cultural activity.

For the crafts sector, the core may be full-time professional craftspeople engaged in one-of-a-kind or studio production work. A related ring could consist of those who produce in large workshops and large quantities, and another ring could include those who manage crafts galleries or outlets, or engage in other forms of crafts sales, marketing or distribution. Another ring may consist of part-time, and still another amateur or hobby producers. Without getting into all the details here, the idea is to include all possible craft-related activity so the full scope of the industry is understood, but gather and identify it in such a way that allows people to include or exclude activities as appropriate to the context. Being inclusive but careful to categorize will also assist in tracking how sector evolves and to follow how firms or individuals move from one segment of the crafts sector to another.

This method of proceeding to gather and categorize data has the virtue of being maximally inclusive, while allowing users to define the crafts industry in ways that suits particular purposes.

3 Part 3 - Working Together to Develop the Crafts Sector

The Canadian crafts sector consists of a large group of skilled artisans that have yet to find an effective means of working together for their common economic benefit. One could argue that the difference between crafts and manufacturing is that crafts has never developed the economic organization required to effectively place their products in competition in larger crafts or regular markets. Now with advances in trade and technology it has become easier and cheaper to reach promising markets further away, without having to expand to mass production. In other words, opportunities to market craft products globally have expanded, without losing the essential character of crafts production. Artisans now have an opportunity to market products globally without losing control of marketing costs. For most artisans, however, it will require some collective action to take advantage of emerging opportunities.

The material in this section is meant to provide a basis for discussion among crafts and government representatives on how the crafts sector might usefully combine resources to maximize the impact of their efforts. The discussion is informed by the preceding overview of the literature and brief interviews with a number of provincial crafts representatives, but it should not be taken as a fully-worked out and endorsed proposal of the CCF/FCMA nor any of its constituent councils.

From an economic point of view, the reasons for the lack of development of the crafts sector are not difficult to guess. As small, even distinct producers, there is no great advantage to be gained by any one producer actively working to develop markets on behalf of the whole group. There are, however, advantages to collectively organize local fairs and shows, partly because the show itself can generate fees and revenues for the organizers and can be seen as a self-standing line of business. Nevertheless, Few producers are large enough to recoup the costs of developing an extensive distribution network for products that take their value from their originality and quality.

The crafts sector is not alone among sectors of the economy with these general characteristics. For example, the farming community shares the characteristics of a large number of relatively small-scale producers compared to the size of the markets in which they deal. While the problems of small-scale farmers are regularly in the news, the response of farmers to earlier crises was to band together in marketing and purchasing co-ops to gain some of the advantages of scale in the market without losing their control over how they ran their farming business.

Perhaps a more pertinent specific example may be found in the Canadian wine industry, where each winery retains its own brand and niche products, but the industry has banded together to form the Vintners

Quality Association (VQA) both to assure quality and to promote Canadian wines domestically and abroad. There are obviously other examples or models where sectors which a relatively large number of small producers have formed associations or other joint organizations to jointly promote the sector or their products. The craft sector faces an ongoing challenge of adopting or adapting a model that suits the particular needs of the artisan and craftsperson community.

3.1 Background

The CCF/FCMA is currently functioning as a volunteer organization. It has no employees or support staff. Operations are funded out of small contributions of cash from provincial councils and donated services of provincial crafts council employees.

The CCF/FCMA is, in effect, the successor to the Canadian Crafts Council, which enjoyed federal government funding but ceased operations in the mid 1990s when that funding was withdrawn. The CCC could be seen as a *national*, as opposed to *federal* crafts organization, since it lacked accountability to existing provincial crafts organizations. As a result, the CCC was not well connected with provincial crafts councils, and seemed to work in isolation with its own agenda. The wave of fiscal restraint of the 1990s swept away the government funding for the CCC, and the organization ceased operations in 1996.

The notion of a Canadian body representing the crafts industry was on life support in the late 1990s until the provincial councils agreed to band together in May 1998. The current structure of the CCF/FCMA reflects the scarce funding resources. As of March 2001, however, The Canada Council for the Arts, through a new National Arts Service Organizations program, has initiated funding assistance to the CCF/FCMA. The support is currently nominal, but it will help the organization to move forward on some of its most urgent operational needs.

The current structure also reflects sensitivity to perceived weaknesses in the predecessor organization. The provincial crafts councils currently prefer a truly *federal* model. This term has lost some meaning in current Canadian usage, but the original meaning refers to the coming together of different jurisdictions for consensus building, rather than a strong centralist organization directing regional extensions.

The current organizational structure has 10 seats with representatives appointed by each provincial craft organization. An executive of five is elected by the provincial representatives, including positions of President, Past President, Vice President, Secretary, and Treasurer. In addition, there is provision for five additional seats on the federation board. Consideration might be given to also include representatives on the

CCF/FCMA board from national groups representing the major crafts disciplines such as clay, wood, metal, glass, and textiles.

The mandate of the CCF/FCMA is reproduced on the following page. For a consultant outside the crafts community, the lack of reference to a common economic purpose in the mandate conveys an impression that crafts is more a hobby or leisure activity than a viable, professionally driven economic pursuit. Though the mandate includes the terms "enhancing the professional environment for craftspeople," there is no explicit reference to a goal of expanding economic opportunities for craftspeople through promotion of the Canadian crafts products either domestically or abroad. If the sector is interested in developing and promoting high value-added economic activity --- through the development of skills, promotion of quality, appreciation of fine craftsmanship, and a world reputation for producing fine craft objects -- that should be clearly communicated in the mandate of the organization.

Under current conditions, the sector seems to have difficulty gathering the financial resources needed to promote its products, partly because its goals are not stated in terms in which governments can justify spending taxpayer money on economic development initiatives. In recent years, fiscal restraint appeared to have reduced the appetite of governments to spend on cultural or heritage activities. The May 2001 announcement by the federal government indicates, however, that there is a renewed interest in developing and promoting cultural industries. Included in the total $500 million investment "in the growth and development of Canadian culture," there is $75 million for the Canada Council for the Arts, and another $32 million to encourage export of cultural products and services in partnership with the Department of Foreign Affairs and International Trade and explore new markets for our artists (Canadian Heritage, 2001).

If the crafts sector wants to secure government support for its activities it must be recognized as a legitimate cultural and economic sector that requires some collective action to overcome the natural advantages of scale in mass production enterprises. Collective action will require some collective resources. The crafts sector has been unable to generate these resources because of generally low incomes and the difficulty of demonstrating that this pooling of resources will provide a return to an individual investor. The recent federal funding announcement for Canadian culture suggests, however, that there is a new opportunity for partnership between governments and craft sector organizations.

3.2 Agenda and Priorities

Representatives of provincial councils agree that the CCF/FCMA ought to focus its activities on those things that provincial councils are unable or unsuited to do on their own. For most sector representatives, this involves a focus on securing the same sort of federal support for activities as enjoyed by other sectors with a clear cultural dimension, including recorded music, publishing, and the fine arts. For members of the CCF/FCMA a key question is, “What will it take for the federal government to realize that the cultural and economic impact of the crafts sector warrants a level of support and cooperation equal to other cultural industries?”

Mandate of the Canadian Crafts Federation / Federation canadienne des metiers d'art

The Canadian Crafts Federation/Federation canadienne des metiers d'art is a national, non-profit arts service organization and a registered charity, whose members are the ten provincial crafts councils. With the aim of enhancing the professional environment for craftspeople in Canada, the CCF/FCMA acts through advocacy, policy initiatives and programs. As the only organization working exclusively for the crafts at the national level, the CCF/FCMA completes Canada¹s comprehensive crafts infrastructure, which extends from local to international levels.

CCF/FCMA is Canada¹s official liaison with the World Crafts Council and other international agencies concerned with craft such as UNESCO.

A continuing aim of the CCF/FCMA is to encourage and facilitate communication between all levels of the craft community, and to improve the crafts information network by working toward accessing and distributing information through advanced communications technology.

In its present mode of operation, CCF/FCMA is focusing its efforts on

1. Co-ordinating and delivering information of interest to the crafts community at a national level;

2. Co-ordinating and facilitating communications to, from, and between provincial crafts councils;

3. Working together with the provincial crafts councils on strategic projects of mutual interest;

4. Providing a forum for both formal and informal consultations between Canada¹s crafts community and the federal government;

5. Intervening on advocacy initiatives concerning crafts issues with departments and agencies of the federal government and in concert with other national cultural sector organizations;

6. Representing Canadian crafts interests to the World Crafts Council, foreign crafts organizations and UNESCO.

The crafts sector is seeking access to the same programs, resources and types of support available to other cultural sectors, but it believes those resources would be more effective if deployed in a decentralized fashion rather than concentrated in a central organization. For the crafts sector, an appropriate level of support would provide resources sufficient for provincial organizations to pursue their own priorities as well as participate in common efforts to promote Canadian crafts domestically and abroad, according to the current working model of the CCF/FCMA. The CCF/FCMA model allows for a more rapid development of programs, solutions, and initiatives by eliminating the cost and delay of developing a large centralized organization.

With this preferred mode of organization in mind, the following list of key priorities for the CCF/FCMA emerged from recent planning documents as well as interviews conducted in the preparation of this report.

1. The crafts sector requires the capacity to represent itself to relevant ministers in the federal government, including Heritage Canada, DFAIT, and, perhaps Industry Canada. Efforts need to focus on ensuring that the crafts sector receives support similar to that of the publishing, recording, and fine arts sectors, based on both the cultural significance of the work as well as its important economic contribution.
2. There is a need for an inclusive, updated and more precise crafts industry profile including consistent information on employment, economic activity, sales, value-added, and trade statistics. This information should be grouped according to themes and mediums such as musical instruments, art-to-wear, jewellery, “art de la table”, religious objects, functional art for the home, including furniture and decorative objects in a variety of materials like wood, ceramic, glass, metal etc.
3. Both domestic and international markets for Canadian crafts products need further development. Domestic markets could be expanded through programs of education, and quality improvement and recognition. Participation and attendance at crafts shows, including theme and medium shows need to be expanded.
4. International efforts could focus on improved access to foreign markets, including expanded access to US crafts shows, improved websites and internet-based commerce, and trade promotion, domestic and international prestige exhibitions, and participation in world exhibitions.

The key barrier that most interviewees cited is lack of resources to promote the crafts sector and to participate in existing government industry and trade promotion programs. Some noted, however, that the organization had not yet found a very effective means of pooling resources and working together.

A number of interviewees also noted that the current organization of the CCF/FCMA seemed to achieve only slow progress toward common goals. The councils are quite united in a vision of the organization and its activities, but some see this slow progress toward goals as a consequence of the current operational structure of the CCF/FCMA

3.3 Operational Structure

The current operational structure consists of a network of provincial crafts councils, with one council acting as a coordinating hub through which much of the federation's communications and correspondence flows. For the past three years, the Ontario Crafts Council has assumed this voluntary hub function. Initiatives of mutual relevance and benefit that require the involvement and input of other members are undertaken by individual member councils. For example, the CMAQ has assumed the lead role in this study project, and CABC is coordinating the US Market Study for Fine Canadian Crafts. Provincial councils, depending on their ability, interest, and resources, assume such coordinating functions for specific tasks or projects. Until there is a permanent hub with dedicated paid staff and adequate resources to represent the sector in a systematic and credible way with the federal government, the present operational model, slow and intermittent though it is, is likely the only viable alternative.

This operational model was adopted partly in light of lessons from experience and partly due to necessity. Most provincial councils have barely enough resources to sustain their own activities, let alone contribute toward resources for a national hub organization. Working out an equitable contributory system appears to be a daunting task under current circumstances.

At the same time, the varying financial circumstance of provincial councils results in significant differences in both priorities and the ability to realize priorities at the provincial level. Some crafts organizations receive significant money from provincial governments; some receive next to nothing. This results in a significant variation in staffing, and vastly differing capacities to conduct activities at the provincial level and similar limitations in contributing to national initiatives.

There is a clear opportunity here for a constructive federal/provincial partnership. The crafts sector is currently relatively weak and disorganized relative to most other industries, but evidence from the US industry and the promise of a sector profile in Canada should demonstrate that this is an important area for government support and individual investment. What the industry needs, however, is some seed funding from governments to allow the required networks and relationships to form and mature.

The crafts sector can advance some very legitimate and appealing arguments to secure additional government support:

- Rural Development: Crafts enterprises have the advantage of not requiring large-scale production found in larger centres or larger projects. High quality, high skill products can be made in relatively remote areas with relatively small investments of public funds.

- Tourism: Crafts and tourism have a long history of association, and the development of the craft sector is clearly a complement to the development of tourism in Canada as a sustainable industry.

- Export: A number of countries have developed markets in fine crafts industries such as Waterford Crystal from Ireland, or Faberge eggs from France, and Inuit carvings from Northern Canada. Canada has an international image that can be both used and enhanced through the development of foreign markets for Canadian craft.

This does not mean compromising on design or quality, but it does mean a concerted effort to develop an international "brand" or image that associates Canadian crafts products with something desired by people throughout the world.

3.4 Conclusion

The crafts sector in Canada stands at a clear crossroads. There is an opportunity to further develop the sector into both an engine of growth for the economy, including rural development, as well as a treasured source of cultural expression and human creativity. Historical circumstances, fiscal restraint, and organizational barriers have kept most of this potential from being realized.

Today, however, new information on the size of the US crafts market, growing consumer taste for high-quality, uniquely designed and hand-crafted products, and a recognition of the value of small scale enterprises in economic development combine to present governments and producers with an opportunity to take a different road. There are too many potential benefits to allow this sector to remain ignored and underdeveloped. The nature of the sector means, however, that it will take an investment on the part of governments to make it happen.

Appendix A: List of French Job Titles in Crafts

- bijoutiers
- bijoutier-damasquineur
- calligraphes
- céramistes
- céramistes-designers
- chapeliers
- chausseurs
- ciriers-sculpteurs
- couturiers
- couturiers-stylistes
- décorateurs
- ébénistes
- émailleurs
- estampiers
- facteurs d'instruments
- ferronniers d'art
- fourreurs
- gainiers (moulage du cuir)
- graveurs
- imprimeurs sur soie
- imprimeurs textile
- joailliers
- joailliers-horlogers
- joailliers-sculpteurs
- jouettiers
- lissières
- marbreurs
- maroquiniers
- marqueteurs
- marqueteurs-tabletiers
- matelassiers
- menuisiers
- métaliers
- modeleurs
- modeleurs-céramistes
- modistes
- mouleurs
- papetiers d'art
- peintres
- peintres animaliers
- peintres sur soie
- peintres sur tissu
- peintres-verriers
- porcelainiers
- potiers
- potiers d'étain
- relieurs
- relieurs d'art
- sculpteurs
- sculpteurs-céramistes
- sculpteurs-modeleurs
- sérigraphes sur tissu
- souffleurs de verre
- tisserands
- tisserands-couturiers
- tourneurs sur bois
- tricoteuse
- vannier
- verriers
- vitraillistes

Appendix B: Crafts Media Categories

Source: Ontario Crafts Council (2001) *Portfolio of Makers*.

Ceramics • Slip Casting • Earthenware • Porcelain • Raku • Stoneware	**Glass** • Hot • Cold • Lamp work • Stained Glass • Fused	**Metal** • Hollowware • Ironwork • Enamel • Flatware	**Wood** • Carving • Turning • Marquetry • Furniture
Fibre • Knitting • Basketry • Clothing • Soft sculpture • Quilting • Batik • Embroidery • Felt • Weaving • Sewing	**Jewellery** • Precious • Semi-precious • Non-precious • Fashion	**Paper** • Papier maché • Handmade • Book arts • Cards	**Other** • Painting
	Leather • Shoes • Clothing • Accessories	**Sculpture** • Carving • Molded • Cast • Assemblage	

Appendix C: Interviewees

1. Anne Manuel, Executive Director, Crafts Council of Newfoundland and Labrador
2. Susan Hanrahan, Executive Director, Nova Scotia Designer Crafts Council
3. Yvan Gauthier, Directeur Général, Conseil des métiers d'art du Québec
4. Louise Chapados, Directrice du développement des services et de l'exportation, Conseil des métiers d'art du Québec
5. Robert Jekyll, President, Canadian Crafts Federation/Federation canadienne des métiers d'art
6. Rosalyn Morrison, Executive Director, Ontario Crafts Council
7. Alan Lacovetsky, President, Manitoba Crafts Council
8. Tom McFall, Executive Director, Alberta Crafts Council
9. Jane Matthews, Executive Director, Crafts Association of British Columbia

Appendix D: Key Organizations in the Canadian Crafts Sector

Organization	Mandate, Mission or Objective	Contact Names and Phone Numbers	Address
Alberta Crafts Council	To support "the development of Alberta crafts and the Alberta crafts industry"	Simon Wroot, Chairman, and Tom McFall, Executive Director (780) 488-6611 ext. 228 or 1-800-362-7238 Fax (780) 488-8855	10186 - 106 Street Edmonton, Alberta T5J 1H4 tmcfall@albertacraft.ab.ca acc@albertacraft.ab.ca www.albertacraft.ab.ca
Atlantic Canada Opportunities Agency (ACOA)	"To improve the economy of Atlantic Canadian communities through the successful development of business and job opportunities"	(506) 851-2271 or (800) 561-7862 Fax (506) 851-7403	Blue Cross Centre, 3rd Floor 644 Main Street P.O.Box 6051 Moncton, New Brunswick E1C 9J8 www.acoa.ca
Atlantic Crafts Trade Show	To organize a wholesale crafts trade show sponsored by the four Atlantic Provinces	Bernard Burton, Show Manager, or Peter Giffin, Show Director (902) 424-8609 Fax (902) 424-5739	Nova Scotia Department of Economic Development Investment and Trade Section World Trade and Convention Centre Suite 520, 1800 Argyle Street Halifax, Nova Scotia P.O. Box 519 Halifax, Nova Scotia B3J 2R7 Acts@gov.ns.ca Burtonb@gov.ns.ca Giffinpl@gov.ns.ca
Burlington Art Centre	To provide "an ideal home for the many visual art and crafts guilds that had been active in Burlington since the 1950s. There are seven guilds that have fully-equipped studios at the Centre. The guilds include Fine Arts , Handweavers and Spinners , Hooking Craft , Photography , Potters , Quilting , and Sculptors and Woodcarvers" .	(905) 632-7796	1333 Lakeshore Road Burlington, Ontario L7S 1A9

Canada International Crafts Industry Ltd	To represent the China crafts industries in North America	Jimmy Zhang, General Manager (604) 278-0928; 1-877-978-0928	115-3757 Jacombs Road Richmond, BC V6V 2R3 jpzhang@ibm.net
Canadian Ceramics Society	To provide "information exchange for career and business advancement to individuals and organizations who are, or ascribe(aspire) to be involved in research, development, manufacturing and application of ceramic materials"	(416) 491-2886 Fax (416) 491-1670	310-2175 Sheppard Ave East Willowdale, Ontario M2J 1W8 www.ceramics.ca
Canadian Clay and Glass Gallery	To collect and display works in ceramic, glass, stained glass and enamel from across the country and internationally.		25 Caroline Street North Waterloo, Ontario
Canadian Crafts & Hobby Association	To "foster industry awareness, interests, growth and prosperity by developing and implementing first rate programs, events and activities"	888-991-0559	#24 1410 40th Ave NE Calgary, Alberta T2E 6L1 ccha@cadvision.com
Canadian Crafts Council	Predecessor organization to the Canadian Crafts Federation.		
Canadian Crafts Federation/ Federation canadienne des metiers d¹art	To enhance the professional environment for craftspeople in Canada	Robert Jekyll, President (416) 408-2294 Fax (416) 408-2310 Jan Waldorf, Past President (905) 845-5357 Fax (905) 845-0935 Sarah Maloney, Vice President (506) 450-8989 Fax (506) 457-6010 Susan Hanrahan, Secretary (902) 423-3837 Fax (902) 422-0881 Ben Parker, Treasurer (204) 488-1483	c/o Ontario Crafts CouncilDesigners Walk170 Bedford Road, Suite 300Toronto, OntarioM5R 2K9 Rjekyll@arvotek.net Jwaldorf@home.com Nbcrafts@nbaibn.com Susan@nsdcc.ns.ca Bencraft@mb.sympatico.ca

Canadian Crafts Museum	The Canadian Craft Museum exhibits and preserves fine craft and demonstrates the social relevance of craft for the public		639 Hornby Street, Vancouver BC V6C 2G3. Telephone: (604) 687-8266, Fax: (604) 684-7174.
Canadian Museum of Textiles	To provide " the opportunity to experience the traditions, skills, and creative genius that make the textile arts such an important visual expression of contemporary and historical concerns"	(416) 599-5321 Fax (416) 599-2911	55 Centre Avenue Toronto, Ontario M5G 2H5
Conseil des métiers d'art du Québec (CMAQ)	To market crafts products and services inside and outside Quebec; to defend craftsperson's professional interests; to offer services aimed at developing quality and excellence in production	Chantal Gilbert, President, Yvan Gauthier, Executive Director (514) 861-2787 Fax (514) 861-9191	Marché Bonsecours 350 St-Paul Est, bur. 400 Montréal (Québec) H2Y 1H2 yvan.gauthier@metiers-d-art.qc.ca www.metiers-d-art.qc.ca
Corporation des artisans en métiers d'art du Saguenay-Lac-Saint-Jean	To determine the orientation of the industry in the region	Alma (418) 662-9255 Jonquière (418) 542-0245 Fax (418) 662-1071	414, rue Collard Ouest, bureau 101, Alma (Québec) G8B 1N2 http//www.culture.sagamie.org/associations/metiers_art
Crafts Council of Newfoundland and Labrador	To advance and promote excellence in crafts for the cultural and economic benefit of Newfoundland and Labrador by ensuring a strong and supportive crafts community and by playing a leadership role in the growth of a thriving crafts industry	Barbara Wood, Chairperson and Anne Manuel, Executive Director (709) 753-2749 Fax (709) 753-2766	Devon House Crafts Centre 59 Duckworth Street St. John's, Newfoundland A1C 1E6 Amanuel@craftcouncil.nf.ca www.craftcouncil.nf.ca
CraftLink Tours	To provide a bus and walking tour highlighting several Winnipeg crafts galleries"	(204) 487-6114	
Crafts Association of British Columbia	To develop excellence in BC crafts by providing communication channels for crafts people, opportunities for members education, business skills development and export opportunities	Anne Mauch, President and Jane Matthews, Executive Director (604) 687-6511 Fax (604) 687-6711	1386 Cartwright Street Granville Island Vancouver, BC V6H 3R8 Cabc@telus.net www.cabc.net

Cultural Human Resources Council		Jean-Philippe Tabet, executive Director 613-562-1535	jptabet@culturalhrc.ca www.culturalhrc.ca
Department of Foreign Affairs and International Trade	Assist national associations and individuals with their international marketing efforts by providing market reports, intelligence, trade development tools and by organizing trade missions.	Anne Delaney, Trade Commissioner Arts and Cultural Cultural Industries Promotion Division (ACA) 613-995-0674	anne.delaney@dfait-maeci.gc.ca www.dfait-maeci.gc.ca/arts
Escape		Claudia Bergen	Cbergen@escape.ca
Gardiner Museum of Ceramic Art		(416) 586-8080 Fax (416) 586-8085	111 Queen's Park Toronto, Ontario M5S 2C7 Mail@gardinermuseum.on.ca
Harbourfront Crafts Studio	To assist "emerging craftspeople to establish professional careers while at the same time exposing the public to the world of contemporary craft"	(416)973-4963 or (416) 973-3000	York Quay Centre 235 Queens Quay West Toronto, Ontario
Industry Canada		Jan Tremblay, Industry officer (416) 973-5075	Tremblay.jan@ic.gc.ca
Labour Market Development Agreement (PEI)	To provide "opportunities for unemployed people, with an emphasis on sectors considered key to the province's economic development"	800 O-CANADA	161 St. Peters Road Charlottetown, PE C1A 5P7 www.gov.pe.ca/infopei/onelisting.php3?number=46836
Labrador Crafts Marketing Agency	To foster the growth of the Labrador crafts industry	Jim Garland, General Manager (709) 896-2121	P.O. Box 1715, Stn. "B" Happy Valley-Goose Bay, Labrador A0P 1E0 labcraft@hvgb.net
Manitoba Crafts Council	To encourage excellence in fine contemporary Manitoba crafts by supporting and promoting craftspeople and increasing community awareness.	Alan Lacovetsky, President and Margaret Anne Fehr, Executive Director (204) 487-6114	390 Academy Road Winnipeg, Manitoba R3N 0B8 Info@craftspace.org

		Fax (204) 487-6115	www.craftspace.org
New Brunswick Crafts Council	To provide opportunities and support to members by developing, promoting, and fostering an appreciation of excellence in crafts	Martin Altken, President and Sarah Maloney, Executive Director (506) 450-8989 Fax (506) 457-6010	87 Regent Street P.O. Box 1231 Fredericton, N.B. E3B 5C8 nbcrafts@nb.ainb.com
Newfoundland and Labrador Department of Development & Rural Renewal	There is a section in this department whose mandate is to assist in the development and marketing of the Newfoundland crafts industry	Pete Barrett Crafts Industry Development Consultant (709) 653-2244/2223 Fax (709) 653-2298	26 Sandy Point Norris Arm, NF A0G 3M0
Newfoundland and Labrador Department of Development & Rural Renewal	There is a section in this department whose mandate is to assist in the development and marketing of the Labrador crafts industry	Jim Spearing Crafts Industry Development Consultant (709) 896-2400 FAX (709) 896-0234	Happy Valley-Goose Bay, Labrador A0P 1E0
Nova Scotia Arts Council	To foster artistic excellence and encourage "creative expression by funding activity in the arts, and ensuring equitable access to granting programs for professional Nova Scotian artists from all practices, from all parts of the province, and cultural backgrounds, including Black, Mik'maq and Acadian artists "	(902) 422-1123 Fax (902) 422-1445	1660 Hollis St., Suite 302, Halifax, Nova Scotia B3J 1V8 nsartscouncil@ns.sympatico.ca
Nova Scotia Centre for Crafts and Design	To promote crafts and design-related industries in Nova Scotia	(902) 424-4062 Fax (902) 424-0670	Nova Scotia Department of Tourism and Culture PO Box 578 683 Barrington Street Halifax, Nova Scotia B3J 2S9 craft-design@gov.ns.ca
Nova Scotia Cultural Network	To promote "broad-based cultural development and indigenous cultural expression throughout the province of Nova Scotia"	Andrew David Terris, Executive Director (902) 423-4456 Fax (902) 423-4248	The Nova Scotia Cultural Network 1657 Barrington Street, Suite 511 Halifax, Nova Scotia B3J 2A1 network@culture.ns.ca www.culture.ns.ca
Nova Scotia	To promote Nova Scotia	(902) 424-8920	World Trade Centre,

Department of Economic Development	Economic Development		Floors 5, 6 and 7 800 Argyle Street P.O. Box 519 Halifax, Nova Scotia B3J 2R7 econ.comm@gov.ns.ca www.gov.ns.ca/ecor
Nova Scotia Designer Crafts Council	"To encourage and promote crafts in Nova Scotia, and to increase the public awareness and appreciation of crafts products and activities"	Bonnie Baker, President and Susan Hanrahan, Executive Director (902) 423 3837 Fax (902) 422-0881	1113 Marginal Road Halifax, Nova Scotia B3H 4P7 Office@nsdcc.ns.ca www.nsdcc.ns.ca
Nunavut Arts and Crafts Association	To promote the work of Nunavut artists and craftspeople	Beth Beattie (867) 979-6880	Iqaluit, NT
Ontario Crafts Council	To promote crafts by providing "information, services and programmes linking crafts professionals to designers, educators, collectors, the business community and the general public"	Pat James, President and Rosalyn Morrison, Executive Director (416) 925-4222 Fax (416) 925-4223	Designers Walk 170 Bedford Road, Suite 300 Toronto, Ontario M5R 2K9 Rmorrison@craft.on.ca www.craft.on.ca
PEI Crafts Council	To promote the economic development of the PEI crafts sector	Doug Cranford, President and Irene Renaud, Administrative Assistant (902) 892-5152 Fax (902) 628-8740	156 Richmond Street Charlottetown, PEI C1A 1H9 Irenaud@hc.itas.net
Potters Guild of British Columbia	To pursue excellence in ceramics	Jane Matthews, General Manager, Gallery of B.C. Ceramics, (604) 669-5645 Fax (604) 669-5627	Bcpguild@intouch.bc.ca www.margaretdesign.com/pguild
Prince Edward Island Department of Development and Technology	"To facilitate the development of the rural areas of the Prince Edward Island economy"	(902) 368-4244 Fax (902) 368-4242	5th Floor, Shaw Building 105 Rochford Street P.O. Box 2000 Charlottetown, PEI C1A 7N8 www.gov.pe.ca/development
Prince Edward Island	To ensure "equitable opportunities for lifelong	Lisa Dennis, Communications	Second Floor, Sullivan Building 16 Fitzroy Street

Department of Education	learning”	Officer (902) 368-4600 Fax (902) 368-4663	P.O. Box 2000 Charlottetown, PEI C1A 7N8
Prince Edward Island Department of Tourism		Sherry McDougall, Communications Officer (902) 368-4801 Fax (902) 368-5277	P.O. Box 2000 Charlottetown, PE C1A 7N8 www.gov.pe.ca/phone/index.php3?number=1120
Saskatchewan Crafts Council	"To promote a committed approach to craft, both as a career and recreation, and to promote an appreciation by the public and government for quality crafts by developing education, marketing, exhibitions and communications activities for craftspeople and the public that will create an environment in which crafts flourishes as a creative and economically successful activity"	Gale Steck, Chairperson and Sandra Grismer, Director of Operations (306) 653-3616 / 5239 Fax (306) 244-2711	813 Broadway Avenue Saskatoon, Saskatchewan S7N 1B5 saskcraftcouncil@home.com www.saskcraftcouncil.org
Signatures Crafts Shows Ltd	To produce six Christmas and two Spring crafts shows in major facilities across Canada	1 (888) 773 4444	shows@signaturescanada.com
SODEC (Société de développement des entreprises culturelles)		514-841-2200	215, rue Saint-Jacques Ouest Montréal, Québec, H2Y 1M6 www.sodec.gouv.qc.ca
The Canadian Crafts Show Ltd.	To organize the One of A Kind trade shows in Toronto and Edmonton	Patti Stewart, Director (416) 960-3680 ext. 25	21 Grenville Street Toronto, Ontario, Canada M4Y 1A1 patti@oneofakindshow.com
World of Crafts Ltd.	To organize the Western Canada Butterdome Crafts Sale	(780) 436-6666	Box 4265 Edmonton, Alberta T6E 4T3 info@worldofcrafts.ca
Circle Crafts in Vancouver		Paul Yard, 604-329-8006	
Uniquely Ontario etc.	"Join the thousands of home-based entrepreneurs who have successfully marketed their products to the wholesale gift marketplace through the	Barbara Mowat, Project Director Toll-free: 1-800-672-0103, Fax: (604) 854-3087,	ImpactCommunications Ltd. E-mail: ICLCanada2@aol.com, www.HomeBusinessReport.com/uniquely.html

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