1. Introduction, Methodology and Scope

This report provides a snapshot of Canada's media arts sector in 2003, including significant information about media artists, media arts organizations and funding organizations involved in the media arts sector. The report includes a brief summary of media arts funding, a profile of media artists and media arts organizations, a summary of some key impacts of the media arts, an identification of challenges and needs in the media arts, a data development strategy, and an analysis of priorities for action.

The Hill Strategies research team was commissioned by the Canada Council for the Arts and the Department of Canadian Heritage (with the participation of the Independent Film and Video Alliance) to undertake a study of the media arts sector in Canada in order to:

1) Provide those who work in the media arts, including organizations such as the Independent Film and Video Alliance (IFVA), the Conseil québécois des arts médiatiques (CQAM) and other organizations across the country, with the information they need to demonstrate the importance of this sector in both artistic and economic terms.

2) Provide government agencies with substantial information to assist them in understanding the media arts sector and the differences between the media arts sector and media industries. This information is intended to help departments and agencies develop or review programs and policies affecting the media arts.

3) Help develop the ability to track and monitor the media arts sector over time. A specific goal outlined for this study is the preparation of a framework and plan for the development of an ongoing database on the media arts in Canada.

This study should be seen as the first phase in a longer research project on the media arts, with a second phase focussing on data development and analysis in the media arts. Please note that the terms of this study did not include specific recommendations on the programs and services of the project partners.

The steering committee for this project consisted of representatives from the Canada Council (Claire McCaughey, Research Manager, David Poole, Head of Media Arts, and Zainub Verjee, Media Arts Officer), the Department of Canadian Heritage (Elizabeth MacKinnon, Senior Policy Advisor) and the Independent Film and Video Alliance (Peter Sandmark, National Director).

The following definition of media artwork, used by the Canada Council for the Arts, helped delineate the scope of the study:

Media artwork is defined as film, video, audio and new media that is created and produced by artists/directors who maintain complete creative and editorial control over their work. This distinguishes media arts from the cultural industries of film, television and new media where producers, broadcasters, distributors and funders have the right to approve the creation and production phases of a work. Media artwork encompasses documentary, experimental, drama, and animation work as well as interactive installations, performance-based work, robotics, web work, etc.

The project steering committee identified that the media arts are a very under-researched segment of the arts in Canada. Most knowledge about the media arts is anecdotal, which does not allow for the depth of understanding demanded by policy or program development. It also makes it difficult to articulate the real cultural and economic importance of the sector. The need for improved quantitative data has been identified by various interests at the federal level as well as by many in the sector itself. This project was undertaken to begin to rectify this situation by contributing to a better understanding of the current realities and functioning of the media arts sector in Canada and by assessing quantitative and qualitative data needs.

One exception to the anecdotal nature of information about the media arts sector is a recent study which was undertaken by Conseil québécois des arts médiatiques on the media arts in Quebec (*État des lieux des art médiatiques au Québec en 2001*). The CQAM study, which contained qualitative and quantitative components, was also undertaken in part to address a visible lack of statistical data on the media arts.

Most of the research team's time was spent organizing and conducting interviews with 71 artists, organizational representatives and funders involved in the media arts sector. The interview process was qualitative, with the objective of gaining knowledge of the significant characteristics of the media arts sector rather than determining quantitative information about interview respondents. As such, the interviews were not designed to be a survey of the sector, and this report does not provide significant statistical results about the media arts. However, as outlined above, a goal of the study was to outline a process for collecting and analyzing quantitative data about the sector.

The list of interview respondents was developed jointly by the research team and the project steering committee. Significant efforts were made to ensure that interview respondents covered a wide range of representational issues, including artists, organizations, medium, genres, region, gender, cultural diversity, Aboriginal peoples and both official languages.

The bulk of the report is based on the 71 interviews conducted between January and March 2003. The research team is indebted to the many artists and arts organization representatives who participated. All

were extremely forthcoming with their thoughts and generous in sharing their time. Clearly, the media arts community was interested in this research process. A list of the respondents is included in Appendix 1 of this report.

Unfortunately, the tight timeframe for this project meant that many potential respondents could not be contacted as part of the study. Others were contacted, but, due to various commitments and scheduling conflicts, the research team was not able to coordinate an interview with them during the study period.

In addition to the interviews, the research team also examined other studies and reports pertaining to the media arts, including the recent CQAM study and a number of background documents from the IFVA and the Canada Council. The team also examined administrative and granting files from the Canada Council. This background research served in part to confirm the project partners' hypothesis that there is a relative lack of current statistical data on the media arts sector.

2. Media Arts Funding

The main source of federal support for the media arts sector is the Canada Council for the Arts. The Department of Canadian Heritage, whose funding programs are generally focussed on the media industries rather than the media arts, has some programs that fund media arts organizations.

Provincial government support for the media arts varies across the country. Some provinces, particularly Quebec, have more generous public support for media arts and for the arts in general. The availability and levels of municipal funding also varies significantly across the country. In some communities, media artists and organizations can access funding from all levels of government, while others do not have the same range of public funding available.

This section gives an overview of the current funding situation for the media arts by the Canada Council for the Arts and the Department of Canadian Heritage. A fuller investigation of public and private support for the media arts is beyond the scope of this study.

Canada Council

In 2001/02, media arts organizations and media artists received $12.4 million in grants through the Media Arts Section of the Canada Council. A total of 700 media arts grants were awarded from a total of 1,796 applications. The $12.4 million represented 10% of total Canada Council funding ($123.8 million) in 2001/02. This amount includes $1 million transferred from the Department of Canadian Heritage as part of the Canadian Feature Film Policy which was announced in October 2000.

Canada Council's media arts funding was split between grants to individual artists ($5.4 million in 2001/02 or 44% of total Council media arts funding) and media arts organizations ($7 million or 56%). Funding to organizations included $2.9 million in support to media arts production organizations (or 23% of total media arts funding) and $4.1 million in support to dissemination organizations (33%).[1]

According to Canada Council's 2001/02 Annual Report, the granting amount of the Media Arts Section places it 6th among Council sections. The breakdown of Canada Council grants by section in 2001/02 (in millions of dollars) is as follows:

- ➢ Music $26.6 million
- ➢ Theatre $23.8
- ➢ Writing and Publishing $20.3
- ➢ Visual Arts $18.0

- ➢ Dance $14.9
- ➢ Media Arts $12.4
- ➢ Public Lending Right Commission $9.7
- ➢ Cultural Diversity $1.8
- ➢ Interarts $1.7
- ➢ Outreach $1.2
- ➢ Other $2.9

As of 2001/02, the Media Arts Section at the Canada Council had been in existence for 20 years. Funding through the media arts section nearly quadrupled between 1983 and 2001, increasing from $3.3 million (or 5% of total Canada Council funding) when the section was created in 1983 to $12.4 million in 2001/02. In comparison, Canada Council's overall parliamentary appropriation increased just over two-fold between 1983/84 and 2001/02, from $65.6 million to $150.1 million. Prior to 1983, film and video artists and organizations were funded through Canada Council's Visual Arts Section.

More recently, Canada Council funding for the media arts has grown from $7.7 million in 1997/98 to $12.4 million in 2001/02. This 62% increase is the largest percentage increase of any Canada Council section during this time. As one measure of "demand" for media arts funding, the increase in media arts grant applications during this time was 16%.

Department of Canadian Heritage

The Department of Canadian Heritage is involved in the media arts through policies and programs in three areas: arts, film, and Canadian Content Online.

The Department's four main arts programs – Arts Presentation Canada, Cultural Spaces Canada, the Canadian Arts and Heritage Sustainability Program and the National Arts Training Contribution Program – all support media-related arts activity. Because Canadian Heritage is not organized by disciplines, it was somewhat difficult to ascertain the amount of funding for the media arts through Canadian Heritage's programs.

The Arts Presentation Canada Program supports arts festivals and series or season presenters of live professional performances. Since its inception in 2001/02, this program has provided approximately $1.2 million in funding to film, video, audio, new media and performance-related media festivals.

The Cultural Spaces Canada Program supports the improvement, renovation and construction of arts and heritage facilities. The program also supports the acquisition of specialized equipment and the

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[1] More information about Canada Council's media arts granting programs can be found at www.canadacouncil.ca/grants/mediaarts.

undertaking of feasibility studies. The program received a three-year funding commitment (2001/02 through 2003/04). To date, media arts and media-related project funding has totalled about $4.8 million. About half of this amount has gone to organizations involved in the media arts, while the other half has been allocated to multidisciplinary organizations undertaking media upgrade projects, such as the establishment of a screening room in a museum.

To avoid overlap and duplication, the Cultural Spaces Canada Program signed a memorandum of understanding with the Media Arts Section at Canada Council for a one-time transfer of funds to Council for equipment purchases in the media arts sector. This transfer also provided funding for research in the media arts sector.

The objective of the Canadian Arts and Heritage Sustainability Program is to support modern management and greater financial stability in arts and heritage organizations. This program attempts to strengthen the environment for cultural organizations in Canadian communities. Also a three-year program, the CAHSP has provided nearly $500,000 in funding to seven media arts organizations since its inception.

The National Arts Training Contribution Program supports independent, non-profit, incorporated, Canadian organizations that train Canadians for professional national or international artistic careers. The program provides about $250,000 in support to two media arts training organizations, the Banff New Media Institute and the Indigenous Media Arts Group.

The Canadian Culture Online section of the Department attempts to ensure that Canadian content is provided through the internet. Although organized as an industrial strategy, some of the section's programs relate to media arts activity. For instance, the Canada New Media Fund, available to companies or professional associations through Telefilm Canada, aims to further the development, production, marketing and distribution of high-quality, original, interactive or on-line Canadian cultural new media works, in both official languages. The New Media Research Networks Fund aims to foster and mobilize Canada's research talent in the private, academic, public and non-profit sectors by facilitating and encouraging partnerships in new media research.

The Department of Canadian Heritage also develops and administers policies and programs in the arts and cultural industries, including film and video policies and tax credits.[2]

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[2] More information about the Department's programs and activities can be found at www.pch.gc.ca.

Possible areas for further investigation include an analysis of Canadian Heritage funding and its impact on the media arts sector as well as an examination of the structure of and relationship between various federal and provincial funding programs for the media arts.

3. Media Arts Profile

Introduction

This section of the report summarizes 71 interviews conducted by the research team between January and March, 2003. The interviews covered a wide range of issues. Although slightly different questions were devised for artists, arts organization representatives and funding organization representatives, many questions were similar between the different types of respondents. For example, the interview team asked about artists' and organizations' activities, their revenue sources, their backgrounds, the technology and equipment needs in the media arts, and the exhibition and presentation of media artworks. Respondents were also asked what they considered to be their most important achievement and what effects their location may have on their work. Issues of identity and cultural diversity were also addressed in many interviews. Respondents were asked to think broadly about the impacts of the media arts and the challenges they and the media arts are facing.

It is impossible to recreate the full insight, humour and nuance of one-on-one conversations in a report such as this. The summary below hopefully captures many of the major points made by respondents. The media arts profile section is divided into four main parts, dealing with: the definition of the media arts; media artists and their work; media arts organizations' activities; and a focus on issues surrounding the distribution, exhibition and presentation of artists' work.

Definition

It is challenging to define media art even for those who know it best – those who create, produce, distribute, present and exhibit it. The very attempt to define media art was considered problematic for some respondents. One respondent asked: "In what other discipline do people have difficulty defining the scope of their own activities?" Most respondents did not have ready definitions for the media arts and/or new media, and many preferred to give examples of the types of works included in the media arts (film, video, audio and new media) or in new media (web, computer-based, interactive, digital work). In general, these examples reflect the Canada Council definition of the media arts.

More specific responses outlined the types of work done in each area of the media arts. Types of film works included fiction, experimental film, documentary, shorts, medium-length or feature-length works. Examples of the kinds of productions done in video format included single and multi-channel video works, video integrated into performance works, and video integrated into installation pieces. Audio work included audio and electronic production, music or sound events, radio and web-based broadcasting. New media productions included robotics, interactive installation, computer animation, web-based projects, software development and network-based artwork. These lists are not exclusive. Media artists

are constantly experimenting with new tools and technologies, combining media tools and disciplines, adapting existing tools or inventing other technologies.

When respondents did not describe the media arts by way of examples, they offered a range of definitions, including "experimental work of moving images", "creative artistic expression through the moving image in all its forms", "electronic time-based work" and "works that understand the potentials of technology". A fuller definition was offered by one respondent: "The media arts can be defined as the process and product resulting from the use of video, audio, film, computer or integrated technologies, sometimes in conjunction with performance, environments, or other technologies."

Because of the fast-paced change in new media, it is especially difficult to establish precise definitions and boundaries around this type of work. Some respondents questioned the usefulness of the term "new", pointing out that it has the same difficulties as the word "modern". Some respondents referred to the use of computer or digital technologies. One offered the definition "new media is media that uses new technology".

Media art is historically rooted in technology, in the emergence of film, video and other technological means applied to the production of creative work. These new or contemporary technologies are changing constantly which has led to some expectation that media art, especially new media, should reflect change, necessarily engaging with technologies that support interactivity, new electronics, robotics, computer programming or the web. Change is an important characteristic of media art.

While the research team found active communities in each area of the media arts, the largest volume of work in the sector is being done in the film and video areas. The film and video areas were also found to be quite separate from the audio and new media areas, with limited crossover of artists between film or video work on one hand and audio or new media work on the other. Some respondents noted that audio and new media works do not have the same references and constraints as film and video, pointing to different practices, history and aesthetics. For example, the steps involved in creating interactive web-based animation software are completely different than those involved in creating and presenting a film or video work. It was not surprising therefore to find that some of those working in new media saw themselves as outside of the media arts, which they felt was defined by film and video. Some even saw themselves as outside all the conventional art streams, as independent creators working beyond current definitions.

Some respondents pointed out that film and video also have distinct histories and theories but are blending more and more because of the increasing use of digital technologies.

Relationship of the media arts to other disciplines

Many respondents believed that an increasing number of artists are working in the media arts. In particular, some respondents noted how media arts techniques are being adopted by artists working in other disciplines, such as visual arts, theatre, dance and music. This combination of disciplines has led to a hybridity of practices in the media arts. Some respondents felt that this hybridity would lead to the media arts changing the arts in general, but some fears were expressed about the media arts being engulfed by other disciplines.

The line between media art and visual art is not always clear. Some artists from the visual arts stream are working with the same tools as artists working in the media arts. For example, some installation artists are using video, and some painters or sculptors are using media tools to pursue their artistic vision. In such cases, the distinction between media art and visual art generally has to do with contextual factors such as the artist's training, the exhibition context they choose for their work, and the distribution systems for their works. Many visual and media artists may have similar overarching principles that they explore in their work, but the manner in which artists choose to explore these principles and the manner in which the idea is transformed into artwork is what points to the difference between media art and visual art.

Relationship of the media arts to the media industries

The many uses of the term "media" make it difficult to define the media arts. Some respondents noted that media art exists in relation to broader cultural definitions of "media" or the media industries, which usually means commercial film, broadcast television and radio. Many respondents emphasized the independence of media art from the media industries. When asked to distinguish between art and industry, artists spoke of pursuing a language of their own corresponding to a set of aesthetic imperatives that do not have to do with the dictates of commerce and popularity. Research and exploration were also seen to be part of a unique, individual means of expression.

Where it was discussed in interviews, there was a general acceptance of the concept of "artist-driven" or "artist-controlled" work as the defining line between art and industry. In some cases, this meant that artists could control their focus and sensibility. Some artists said that they chose to sacrifice aesthetic quality to focus on the substance of their works. In other cases, moving away from the industry model freed artists to articulate an aesthetic sense that they felt would only be accepted in the art world.

Although the process of creating a media artwork often mirrors the production processes of the media industries – scripting, camera crews, actors, producers, editors, distributors, etc. – it was noted that media artworks are distinct. On a process level, artists are often engaged in media art creation on many levels, conceptually and practically, often producing, writing, directing and editing their work. Media art also

generally operates on a different scale than popular film, television and radio. In addition, non-profit artist-run centres are central to media arts production, distribution and exhibition, while for-profit firms dominate the media industries.

Media art also differs from the media industries because of personal, intimate or experimental approaches to content. In particular, media art may be focussed on particular socio-political issues. Some respondents observed that media art, especially film and video art, has contributed significantly to the critical discourse around race, gender and sexuality in the past 30 years. Media art's engagement with political and theoretical discourses may be overt where artists see themselves as "sarcastic", "angry" or intent on "upsetting the applecart", but it need not be overt. Some respondents viewed their contribution to discussions about race not so much in terms of a polemic measured against a mainstream as a reflection of more personal, local experience, something that the broadcast or media industries appear not to strive for or are rarely able to achieve. Many media artworks contribute to democratic discourse by broadening the range and diversity of voices that are heard and the stories that are told. Works by culturally diverse, gay and lesbian artists often speak to members of these communities in ways that the mainstream media cannot.

There was a strong expectation among many respondents that media art would be critically engaged with technology and its impact on society. As one respondent put it, "critical analysis of, and interaction with, [broader] media culture is often a strong aspect of media arts practice". For example, some artists have used the tools and techniques of surveillance systems to critique the omnipresence of surveillance in our society.

New media artists were also aware of a relationship to a larger, popular mainstream, including the web, commercial software development, teleconferencing and gaming.

Some artists saw their work as speaking directly to a small, well-defined audience whose experiences are not reflected in the media industries. In contrast, other respondents said they were drawn to media art partly because of its potential to reach a wider audience through broadcast TV and movie theatres. Artists working in new media spoke of the potential of broadband networks to carry artistic work to a larger audience but also noted the presence of audiences especially attuned to their work.

Funding categories
The many subtleties and difficulties in defining media art influence the public funding of media art. More than one respondent despaired that they have to fit their work into existing categories in order to find support. It is difficult to categorize some works, especially where there is a crossover between a traditional category like dance or theatre. Some artists indicated that they have sometimes felt pushed by

funding agencies to apply in one category rather than another, instead of making their own assessment of where their work best fits. This leads to uncertainty for artists about where they are to apply for support and how they are to explain their work.

Some respondents believed that traditional disciplines (such as music and dance) are better-funded yet do not succeed in funding innovative work involving media arts elements. Respondents indicated that many artists seek funding from the media arts for works that are, in essence, music or dance pieces, because of the perception that innovative work is poorly understood in the context of traditional disciplines and is better received in the media arts. Respondents wished to see the traditional disciplines better accommodate and recognize the contribution of new media and the media arts within the evolution of their own disciplines.

Respondents also noted that federal and provincial funding systems run parallel but have some important differences in criteria and definitions that artists have to sort out in order to fit their work in as best they can. This gives rise to concerns that the work will not be properly understood and that support will fall short of what is needed to produce the work.

Key characteristics

In conclusion, the interviews made it clear that media art cannot be easily defined, and even that definition in the sense of categorization is problematic and sometimes undesirable. This suggests two things. First, it suggests that efforts to better understand media art should not have as their objective stricter definition. What is needed is a more inclusive approach. Second, media art is not merely about new technology or innovation. That artists choose to work with popular media is significant but not what defines their practices. Rather the definition of media art begins to have substance only when the aesthetic, historical, theoretical and political implications of artists' choices to work with popular media tools are factored in.

The interviews highlighted the following key characteristics of media art:

Media art is created by individuals who generally identify themselves as artists. There was even some ambiguity in this, however, as not all of those interviewed identified themselves as artists. This was true for some working with new media, such as Flash programmers who develop technologically innovative and interactive work. These individuals do not position themselves relative to the art world.

Media art is characterized by the use of technology, where "technology" means contemporary digital, mechanical, acoustic or electrical devices. Media art is often innovative and experimental in relation to the

technologies, which also helps to distinguish it from the media industries.

New media is characterized by the use of digitally-based technology that post-dates film, television and radio or by the use of technology that is still in development. New media works are often interactive.

A lot of media art is characterized by experimentation and innovation. For some, this meant experimentation and innovation in tools and technology. For others, experimentation was less directly tied to technological innovation and more to experimentation in content and approach. The content of media art may be distinguished by its personal, local, political or theoretical bases and also by its non-traditional or experimental treatment. Content may be synthesized with the media that are used to the extent that a new kind of message emerges. Like much other artwork, media artwork often endeavours to affect our understanding of the world and the nature of our experiences.

Artists

As noted above, the range of artists' work in the media arts is very broad. Some media artists interviewed by the research team indicated that they also had other art production experiences, including painting, photography, writing, performance and dance.

Production tools / technology

Clearly the biggest change in the sector in the last ten years has been the development and adoption of digital technologies. Respondents noted that lower costs of digital equipment and software have made it easier to create media works with the result that more works are being created. Although media art production is often a collaborative effort, involving technicians, actors or production assistants, access to digital tools has to some extent brought about a "pyjama revolution"; artists can and do work more on their own, often at home. The accessibility of digital tools has also made it possible for artists to work regularly and intensively with the tools of their craft, which some respondents believed to be essential to the development of strong work. However, the increased ability to do more work on their own also raises the risk of artists becoming more isolated.

This trend toward working in isolation is mitigated by other factors. For instance, the research team's interviews revealed that, despite the accessibility of some digital technology, only a minority of artists own their own equipment. Equipment ownership is more common in video, audio and new media than in film. In addition, respondents indicated that artists often self-produce up to a point and then require access to more sophisticated and costly systems in order to complete their work. At this point, artists often use the systems and services available at media arts centres. Some respondents expressed a need for even more specialized technical support services and more extensive help with distribution.

Respondents told the research team that the shift to digital technologies has also had an important impact on the way they approach their work and on its subject matter explored in works. Many artists have used digital technologies to explore the relationship between art, science, technology and society. The predominance of technology in media art caused some respondents to ask whether media artists do not sometimes become preoccupied with technological questions to the detriment of philosophical or artistic questions.

It is difficult for both artists and media arts centres to keep up with the constant advances in media equipment. It is also challenging and costly to deal with frequent upgrades in software. Media arts centres have to upgrade their equipment and expertise in order to provide relevant services. Agencies have to be aware of changes to ensure that their programs are relevant and adequate to the costs of production.

Artworks that are produced in media such as film and video raise other issues as well. Artists expressed concern about the stability of the media with which they work. Tape and film formats become rare and more difficult to access as the equipment required to project them becomes dated.

Age and experience

The artists with whom the research team spoke have up to 25 years of experience in the field and have produced anywhere from one to 25 or more works. Over time, many artists have explored a broad range of media, choosing the ones they feel work best in a given piece of work.

Many respondents noted significant differences between younger and older artists. Young artists, who appear to be somewhat more likely to self-identify as "media artists", are quite willing to engage with technology in a variety of ways. Many young artists see their work as ephemeral and transient, whereas older, more established artists have serious concerns about archiving and the permanency of their work. The absence of media arts history was also noted more commonly by older artists.

Respondents suggested that many younger artists do not appear to be particularly interested in the community aspect of access centres. They often see artist-run centres as institutions, which they generally mistrust.

Interviews also revealed that younger artists appear to be more influenced by commercial models of production than older artists. Younger artists are less likely to approach access centres until the very end of their productions and will then approach centres on a business-like fee-for-service model. Some younger artists – used to business models – expressed misgivings about the services and efficiency of some media arts centres.

Costs of work / Income sources

The costs of media artists' projects varied widely, ranging from short films or video works that cost very little to feature films that cost millions of dollars.

Revenues obtained through grants, sales, rentals and exhibition of work do not provide artists with sufficient income to sustain their work. Artists with whom the research team spoke indicated that the revenues from their last work varied greatly, from $150 to $10,000. Revenues near the high end of this range were the exception to the norm and were often cumulative amounts from multiple screenings, related speaking engagements and other activities. Steady and adequate income from the media arts is rare and usually comes only after many years – and then only for the most prolific artists who have a large body of work in circulation.

Not surprisingly, media artists generally pursue larger-budget works only if they receive grant funding. Artists also indicated that grant funding also allows them to pay their collaborators and to create more polished works. Some artists noted the significant boost to their careers from the receipt of funding. One respondent noted that, although she didn't really understand peer approval at the time of receiving a grant, she later recognized the importance of being recognized by her peers in the grant assessment process.

Respondents noted that many grants only cover a portion of the true costs of a work. For one respondent, the estimated cost of production amounted to $300,000, only $60,000 of which was covered by grants. Many artists who have not received funding still manage to make works. Artists not receiving funding or receiving only a portion of the costs of a work are exceptionally resourceful, volunteering their time, borrowing equipment and bartering time and equipment with others. However, a number of respondents indicated their growing discomfort with the frequency with which they are forced to ask others to volunteer their labour or submit to deferrals.

Other artists indicated that there are hidden post-production costs that are either not covered or only poorly covered by funding, including the time involved in researching festival opportunities as well as the costs of packaging and mailing to a number of different festivals.

Given the expense of producing and distributing work, revenues from grants, sales, rentals and exhibitions may only cover hard costs associated with a work. Artists are rarely paid for the time invested in a project. Most respondents indicated that they invest heavily in their own work, using income from other sources such as full-time, part-time and contract work, teaching or family support. One respondent indicated that "no one can survive on the media arts; it means having to take on jobs doing other things."

Many artists indicated that they have jobs in the non-profit sector, and some said that they occasionally do work in the media industries. However, most artists have only limited involvement with the industry, and engagements in the industry are often seen as occasional opportunities to pay rent and other necessities. Some artists work in the industry in areas that are not related to their artwork. Of course, opportunities to work in the media industries are less frequent outside of major urban centres where there is only a limited amount of industry media production.

Some respondents expressed concern that artists who develop skills working on art projects and then go to work on commercial projects will not return to artistic activities, lured away by the promise of a decent living.

Many media artists interviewed indicated that they are time-stressed, juggling full-time, part-time or contract work with artistic projects that demand concentration and time. Few jobs are flexible enough to allow artists significant blocks of time off to concentrate on their artworks. One respondent observed that many of the artists who have been able to sustain a career are those who have been able to teach, especially in university settings. But there are very few tenure track positions, and even fewer occupied by culturally diverse or Aboriginal artists.

The lack of clear blocks of time can affect artworks themselves. Respondents indicated that research and other preparation are usually the first to suffer from a lack of time, leading to concerns that the works are being compromised.

Financing is particularly challenging for media art because of the expense of technologically-based production. Modes of production, technical systems, equipment and standards are constantly changing. Artists have to cope with the obsolescence of media formats and constant software upgrades. Some respondents indicated that the development of new media is lagging because of a lack of money to support exploration.

Perhaps a symptom of the complexity of and rapid change in the sector, respondents identified a need for arts councils to be more sensitive to the definitional challenges faced by artists when submitting a grant application. Some respondents expressed the desire to obtain more support from grants officers in identifying ways to find support for their work whether or not it fits neatly into one category or another.

Grants officers bring together juries that have significant impacts on artists' careers. A few respondents expressed concern that grants officers did not have the appropriate knowledge to deal with the wide range of practices in the media arts and, specifically, to bring together balanced juries with in-depth knowledge of the wide range of practices. This would put some applications at a disadvantage in the peer

assessment process. Given the complexity of the sector, funding organizations face a range of important organizational and professional challenges in supporting the media arts.

Furthermore, some artists perceived the role of grants officers to include the presentation and contextualization of grant applications when applications are discussed by juries. Arts council representatives noted that the presentation of applications is not part of officers' roles and that, in fact, artists present their works themselves through their grant applications. There appears to be a misunderstanding of the role of grants officers by some artists interviewed.

Diversity

Many respondents indicated that the production and exhibition of works by culturally diverse artists are key to the development of the media arts. But the research team also found that the ways in which artists' works focus on race, diversity and identity vary considerably. Many respondents said that they see their culture, heritage and experiences as integral to their work. One indicated that he wished to tell "stories that wouldn't get told otherwise". Others indicated that their works are sometimes, but not always, inspired by their cultural background. Some respondents spoke of the universal reach of their works and the universal humanity that is present in their works. Another wondered whether, in feature film production specifically, the stories that culturally diverse artists or Aboriginal people wish to bring to the screen could achieve the mass appeal necessary for commercial success.

Respondents believed that systemic barriers in production have been addressed in a fairly satisfactory manner, in that the percentage of culturally diverse applicants receiving grants is good. The efforts of Canada Council, in particular, to support the works of artists of diverse backgrounds was lauded by a few respondents, some of whom contrasted this with the lack of progress in some other funding agencies. Many culturally diverse artists also indicated that they were involved in media arts centres.

Some culturally diverse artists interviewed by the research team felt that they have opportunities that are similar to other artists. Some felt that their difficulties and frustrations were typical of artists and were not specifically race-based. One respondent noted that, "when looking at race and ethnicity … the issues are more specific and more intense, but the fates of artists of colour are interlinked with the fates of other media artists."

On the other hand, some felt that opportunities once available to culturally diverse artists, such as racial equity funds, were no longer available. Some spoke of the decline of cultural diversity and representation as an issue in programming.

Other artists expressed concern about backsliding from the overt political positions and strategies over race and identity that were developed during the eighties and nineties. One respondent argued that "the thrust for voice has died down".

The research team heard that service organizations dedicated to promoting and supporting the work of black media artists, such as the Black Film and Video Network, have ceased to exist. Much importance was placed on the growth and development of new organizations, such as the Iced in Black Film Festival, which is based in Toronto and has developed a national tour.

An Aboriginal perspective

The Aboriginal artists interviewed by the research team stressed that Aboriginal people approach the media arts from a distinct perspective. Awareness of a connection to popular media was highlighted by many working in Aboriginal communities. The research team was told that Aboriginal youth, especially in isolated communities, have little experience with the more traditional fine arts and are often exposed mainly to mainstream forms of entertainment like television, movies, music and video games. Because of this, the ambitions of artistic Aboriginal youth often focus on the media arts. The media arts were seen to constitute "one of the hottest areas of Aboriginal youth attention". Other respondents noted that the media arts constitute a natural area of endeavour for Aboriginal people because of strong Aboriginal storytelling traditions.

The research team was also told that Aboriginal people are using media art "as a new way to express where they are from and how they were brought up. Art is a part of the person in Aboriginal culture."

Some respondents noted that there is limited artistic training offered to young Aboriginal people. Many Aboriginal media artists and organizations were attempting to address this by offering mentoring opportunities, workshops and courses in the media arts. Many artists and organizations were concerned with providing opportunities for Aboriginal participation in the media arts.

A number of Aboriginal artists, like other media artists, indicated that it is difficult for them to find sufficient exhibition and presentation opportunities, something one respondent suggested could be addressed in part through stronger mentoring from those with more experience. Mentoring was also mentioned as an important mechanism to encourage and train younger artists in media art and to develop interest in the media arts.

Some respondents noted that the creation of the Aboriginal Peoples' Television Network was a singular development for many working in Aboriginal media arts. APTN has provided a showcase for Aboriginal culture and an opportunity for media artists and technicians to work in the industry.

One respondent pointed out that Aboriginal people in Canada enjoy strong connections with indigenous peoples around the world, and that strengthening these connections will always be a priority to them. Another respondent noted that many Aboriginal people do not recognize the border between the U.S. and Canada and pursue their careers as though it did not exist.

Geographic location

The research team asked respondents how their location affects their work. Most artists were aware of differences between working in the countries' largest cities and working outside of Toronto, Montreal and Vancouver. Respondents working in smaller centres such as Moncton, Halifax, Winnipeg or Calgary were clearly proud of their ability to have built and sustained a viable media arts community. Still, some artists leave smaller communities for more populous regions, which makes it more challenging to develop and maintain a viable media arts community. The ability to travel, to see the work of artists in other locations and to bring artists in from other locations were all seen as vitally important.

Respondents in Toronto, Montreal and Vancouver talked about a "critical mass" of people and resources that is both stimulating and supportive. They emphasized other aspects of their locations: the desire to ensure access by being located in the heart of the city; the need for differentiation between centres that might otherwise be seen as competing with each other; and the need for improved facilities and expanded programs to meet what they believe is a growing audience hungry for alternatives to the mainstream media.

Respondents working in Toronto, Vancouver and Montreal clearly feel advantaged, in that there is a substantial industry backbone in these centres. This makes it easier for artists to supplement their income by working in the industry. Some observed, however, that the potential for industry work is a double-edged sword, that the industry can swallow up artists leaving them with no time for their own projects. One respondent speculated that when the industry is busy and artists are relatively flush with cash, the quality of their work suffers.

Respondents expressed some concern about disparities in funding based on where they are located. Respondents from smaller centres said that they have to overcome scepticism about their work based only on the fact that they are not working in a larger centre. On the other hand, another respondent speculated that artists in the larger centres may actually be disadvantaged by the amount of high-quality competition for funding support. This respondent also expressed misgivings about the quality of work produced in smaller centres that are isolated from the dominant critical discourses and have fewer experienced and skilled artists.

For some respondents, the choice to work in one region or another was based on factors having to do with "fit" or receptivity to the type of work that they do.

Research

Respondents were very pleased to hear that Canada Council is developing an overview of the sector, some remarking that it is long overdue. At the same time, most respondents are time-stressed and focussed on their art. Research for them usually means following the work of their peers, keeping up with advances in technology and developing their craft and sensibilities.

Media arts organizations

Scope of activities

Media arts organizations are involved in the production, exhibition, distribution, promotion and archiving of materials related to film, video, audio and new media. Organizations are also active in promoting and maintaining a discourse about the media arts, including some publishing efforts. Most of the organizations in the sector are artist-driven, with artists having a key role on boards of directors and in many staff positions. This section of the report focuses on artist-run production centres, while the next section deals with artist-run distribution and exhibition organizations in the context of a broader discussion of the exhibition and presentation of artists' work.

Professional development is an important aspect of the mandates of many media arts centres. This is especially true for Aboriginal centres, many of which have a particular focus on training Aboriginal youth. Workshops, artist-in-residence programs and free access to equipment are all ways in which centres encourage and foster the development of artists' skills. In fact, many centres believe that they make a significant contribution to the development of a highly skilled pool of workers. Organizations indicated that this is especially important in certain locations, such as Halifax, where this kind of professional development is seen to have a crucial impact on both the artistic and commercial sectors because other industry players are missing. In Halifax, the Centre for Art Tapes' professional development activities assist other organizations such as the CBC in having access to qualified personnel.

Media arts centres also provide access to expertise. This is especially apparent with new media centres, where access to expertise may be even more important than access to equipment.

Some organizations do outreach with communities generally perceived to be voiceless in mainstream media, including queer youth, urban Aboriginal people, ethnocultural communities and economically-challenged communities. In Calgary, EM Media has attempted to generate interest in the production of media works in Aboriginal and rural communities in Alberta by taking a mobile digital editing system to communities that otherwise would not have access to this technology.

A less measurable benefit of artist-run centres is the creation of a community of like-minded people. Access centres are poles of activity and function as crucial hubs in developing and maintaining personal and professional relationships that can have important impacts on artists' careers.

In addition to facilitating the production of work by artists, some centres have become producers of work, by finding financing and organizing many aspects of a piece's production. Many of these centres have developed an artistic direction with regards to producing work.

Some centres have also implemented programs to develop audiences and knowledge of the artform. In Vidéographe's Cinebicycletta program, two cyclists strapped a DVD player and a disk on their bikes and cycled to various municipalities in Quebec to show some work from Vidéographe's collection. In Alberta, Metro Cinema and the Alberta Media Arts Alliance Society collaborated on a travelling show of video work. The work was curated by Metro Cinema and travelled to many locations in Alberta that would not normally have access to independent media artworks.

Membership

Artist-run production organizations' memberships ranged from only a few people to several hundred. Centres stay in touch with their community via e-lists, newsletters and various mailings. Media arts centres are greatly concerned with offering artists a professional level of facilities and services. All attempt to respond to their members' needs, although given the wide range of media arts work and limited budgets, not all needs can be accommodated by the centres.

Interviews revealed that some centres have experienced changes in their membership. One centre noted that its overall membership was stable, but that the individual members had changed. Another indicated that it had seen its membership more than double over the past two years, with an infusion of younger members. Given the qualitative, not quantitative, focus to the interviews, the research team was not able to identify a consistent trend in membership.

Budgets and revenue sources

Organizations' budgets range from under $100,000 to over $1,000,000. Overall, the main source of revenue is government grants. Many organizations apply for different types of government assistance, including operating grants, equipment grants, special project funding and employment program assistance.

Self-generated revenues range from 10% to 90% of budgets. Self-generated revenues above 50% of total budgets are quite rare. The main sources of self-generated revenues are equipment rental, sales of

supplies and services, ticket sales, bar sales, fundraising initiatives and even contracts for event coordination. A few media arts organizations receive funding from private foundations.

Public funding for the media arts varies across the country. In some communities, organizations can access funding from federal, provincial and municipal government agencies, while other organizations do not have access to the same range of public funding. Provincial levels of arts support and support for the media arts also vary significantly.

Interviews revealed that organizations' budgets are generally insufficient to meet their aspirations, and therefore organizations curb their activities to fit within their budgetary means. One respondent went so far as saying: "The government and others still think artist-run galleries should operate on nothing, breeding the culture of poverty and mediocrity."

Other respondents pointed out the burden of having to depend on project funding to sustain their operations. They noted that when revenues come in per project and without any guarantee, there is a great deal of financial risk involved, limited flexibility and limited ability to plan.

Human resources

Media arts organizations, like other organizations in the cultural sector, face a range of difficult human resource issues.[3] Most centres expressed the need for additional staff. Many staff members interviewed by the research team felt overworked and underpaid and expressed serious concerns about burnout of current staff given difficult working conditions. One respondent noted that centres "are constantly compromised, the salaries are dismal, there are no benefits and these conditions lead to burn out." Another centre administrator noted that, in order to pay wages comparable to other artist-run centres, the organization had to forego having a public office, instead housing the office in the administrator's home.

Another respondent pointed out that "health care benefits, RRSP contributions and other employment benefits are not being addressed and yet there's a need for them."

Since staff salaries and benefits are low, it is difficult for organizations to develop a stable team of employees. In addition, providing staff with on-going professional development is a challenge. Given these factors, it is hard to keep experienced staff as they get older and are faced with very pragmatic concerns of earning an adequate wage while trying to support a family. Many leave the sector for the better salaries, benefits and development opportunities in the media industries or the education sector.

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[3] For an overview of issues in the entire cultural sector, see the recent report by the Cultural Human Resources Council *Face of the Future: A Study of Human Resource Issues in Canada's Cultural Sector*.

One respondent put it this way: "Sometimes I'd like to leave this job because the salary is so low. What keeps me here is the opportunity to do programming. I have a vision."

Many organizations rely on volunteers to coordinate and/or staff certain activities. The management of volunteers is an important and sometimes onerous task. Many centres attempt to minimize costs by employing individuals through short-term employment programs, which can compromise staff and centre development over the long term.

Technology and equipment

Equipment appears to be reasonably accessible in most cities across the country. In fact, some respondents raised the question of equipment duplication, specifically in Montreal. Others felt that Montreal media arts organizations have substantially different mandates and clientele. Basic questions were raised concerning the degree to which organizations should specialize or provide a wider range of services and equipment. Interviews revealed a lack of consensus on this question. Some respondents believed that there is a need to strategize and provide pan-Canadian centres that excel in very specific areas. Others did not share this view.

Some respondents acknowledged that there are pressures on centres to buy the best gear and the latest hi-end format, while others were critical of what they see to be industrial pressures being applied to non-industrial productions, many of which do not require such high-end industrial standards. The cost factor, the research team was told, is often what drives an artist's production decisions and is of primary importance in decisions related to equipment and usage.

The move to digital technologies has changed the nature of services provided by many access centres. Given the intricate languages of technology, there is an increased need for expertise rather than simply equipment. Although many artists have a good working knowledge of some software or equipment, they might not be able to solve the numerous problems that come with producing a piece from beginning to end. The learning curve is still steep, especially for high end equipment. Many artists would prefer to call upon experts to help them realize their creative vision. Many centres are attempting to respond to the changing needs for access to expertise.

The advent of digital technologies has had other major impacts on media arts organizations. Respondents frequently cited the incessant pace of change, obsolescence and upgrades as well as the difficulty of networking equipment and training staff on a range of software and hardware platforms. Many centres are concerned about the possibility of a fundamental shift in technology, such as broadband internet, which could create many opportunities but which would also raise a host of cost and service concerns.

Some centres started out in a specific field (e.g., video) and have seen their activities evolve to include a wider range of practices (e.g., new media or audio). Many organizational respondents spoke to the issue of cross-platforming and saw it as part of the ongoing changes that transform the sector. Centres have attempted to be flexible and responsive to artists' needs and desires to explore new ways and new tools to articulate their artistic vision. Some centres in this situation lamented the fact that public funding has not kept up with the expanded mandate.

Media organizations and emerging artists

Media arts organizations are very keen on nurturing emerging talent. Much organizational energy is spent supporting the work of emerging artists through residencies, grants and employment programs. Many organizations include work produced by emerging artists in exhibition initiatives, as does Charles Street Video through its collaborations with the Images Festival and the Inside/Out Festival. Many creative ways are found to help emerging artists along the initial path of their careers, in the process helping to revitalize organizations. These means are often informal and range from free access to equipment without fulfilling membership requirements to renting equipment for events at cost. Ironically, the research team has heard that young artists are often wary of artist-run centres, seeing them as institutions, yet considerable energy is expended by the centres to welcome, even mentor, young artists. One young artist pointed out the major impact of a particular centre in the fostering of his career. The centre facilitated equipment access and the rental of a location so that the artist could organize performances. The centre's personnel is also helping him organize and submit his first grant application.

Location

In response to the research team's question about location, most organizations indicated that they could only operate where they are, be that Moncton, Montreal, Toronto, Calgary or Vancouver. Location lends a certain quality – a certain personality – to many organizations. Quebec City, for example, was characterized by a strong interest and involvement in multidisciplinary work. Montreal was seen as offering opportunities in new media unavailable elsewhere in the country. Toronto was described as having more of an underground attitude or culture than other cities. Whether real or perceived, these nuances colour how media organizations see themselves as part of a local cultural ecology.

One organization involved in presenting audio performances pointed out that it could *only* be located in a large metropolitan area, because it needs to have a critical mass in order to have a sufficient audience for the kind of specialized programming it puts on.

In large metropolitan areas, organizations generally saw the clustering of organizations in one building as having a positive influence on their ability to network and collaborate. Clustering was seen to create

"value added" by altering the landscape of a community and bringing a spirit to the neighbourhood. Organizations in cluster buildings also believe that there is an increase in public visits, as people who come to the building often visit a range of different centres. The proximity of colleagues and friends was also seen to have the potential disadvantage of added work disruptions.

The mandate of some organizations affects their location. For example, distributors need significant space to store works. This restricts them to areas where rents are lower. These areas are generally further away from the downtown core, sometimes not as easily accessible as downtown sites.

Some organizations expressed a desire to set down permanent roots, instead of having to move periodically because of rent pressures. This instability poses real challenges for organizations that are already stretching their human and financial resources. For some centres, the ability to purchase a space has been a definite boon to their existence.

Finally, location creates specific challenges for media organizations situated in different regions of the country. Smaller cities and rural areas often see artists leave their regions for larger metropolitan areas where a wider range of services and opportunities are available. Some regions are more isolated than others and therefore not as connected to the larger Canadian artistic community. However, some organizations indicated that their relative isolation gave them the time and space required to focus on the work at hand. Others felt that there is greater cross-disciplinary interaction in smaller cities.

Collaborations

Many new media centres work collaboratively with a range of organizations to amplify the impact of their programming as well as to increase the interconnections between the artistic, scientific, academic, corporate and public domains. The research team was told of a collaboration between a new media centre and private software development companies to test new products. Other organizations noted their collaborations with research centres inside and outside of the university context. For example, in Quebec City, Avatar and Robert Lepage's *Ex Machina* are collaborating with Laval University on a research project to develop sound and image software adapted for stage presentations. In Montreal, Hexagram is another example of a multifaceted effort to combine research and artistic application. One respondent pointed out: "People from the education *milieu* are interested in the work being done in the artistic *milieu* because it is what moves research forward." These examples point to the crucial role centres play in pushing forward research and development and why collaborations with universities and other educational organizations are key to the advancement of the sector.

Some centres expressed a desire for more industry players to be more actively involved in research laboratories, believing that industry support could make the labs powerful venues for the advancement of the media arts.

Professional associations

Most organizations belong to one or more professional association. The wide range of associations mentioned underlines the complex web of relationships that media arts organizations maintain in order to address networking, representation, educational and technical issues. However, some new media organizations indicated that they did not feel adequately represented by existing service organizations.

The most frequently cited service organization to which media arts organizations belonged is the Independent Film and Video Alliance. Others include the Alberta Media Arts Alliance Society, Association des cinémas parallèles du Québec, Calgary Professional Arts Alliance, Canadian Artists Representation, Canadian Association of Cultural Studies, Canadian Electro-acoustic Community, Canadian Conference of the Arts, Canadian Library Association, Canadian Museum Association, le Conseil québécois des arts médiatiques (CQAM), Cultural Human Resources Council (CHRC), Culture Montréal - Événements unis Montréal, Ontario Association of Art Galleries, ISEA, International QuickTime VR Association, NAMAC, Plains Artist Run Centres Association, Regroupement des centres d'artistes autogérés du Québec (RCAAQ), Rhizome, and Tourisme Montréal.

Profile of administrators and artists

The research team asked most respondents about their educational background and found that the vast majority of administrators and artists have completed at least a bachelor's degree, often in Fine Arts, Film Production, Music, or Communications. Some have a master's degree, often in Fine Arts.

Many have taken additional training for a variety of purposes through community colleges, universities, artist-run centres and the Banff Centre for the Arts. Some expressed an interest in ongoing professional development, including a better understanding of business practices and training in specific computer-related software, technology (such as web streaming) or hardware.

Administrators working in media arts organizations have worked in the field for lengths of time ranging from under one year up to 25 years. The research team was struck by many respondents' long involvement in the media arts – often even with one organization. Some respondents pointed out that the average age of administrators is higher now than it was 15 or 20 years ago.

The majority of respondents had a number of different roles in the arts beyond their artistic or administrative work in the media arts. These roles include teacher, mentor, technician, writer and volunteer (usually as a board member for another organization).

Distribution, Exhibition and Presentation of Artists' Work

Artists show their work through galleries, museums, festivals, programming collectives, cinémathèques, cinemas, web databases, websites, television, biennales and educational networks. Artists are often involved in organizing events to present their own work and have given rise to an infrastructure of artist-run organizations to distribute and show media works. These artist-run organizations, including festivals, cinémathèques, programming collectives and distributors, are an integral part of the media arts sector.

Despite the artist-run distribution and exhibition system, respondents indicated that distribution and exhibition are the sector's greatest challenges. A number of respondents wished to see a better-structured, cross-country exhibition circuit for media artworks. The potential markets for media artworks have not provided artists with sufficient exhibition and income opportunities. However, a minority of artists interviewed by the research team indicated that they have not had difficulties in getting their work shown in Canada or internationally.

Markets

Artworks in film and video are competing within a larger marketplace that includes feature film and television, which raises specific challenges in terms of marketing. There is a complex web of markets, with the primary market being screenings and exhibitions at festivals, in galleries, through programming organizations, or in other venues. These activities may be bundled with speaking engagements or residencies. Secondary markets include distribution to schools, universities, community groups, unions, archives and web broadcasting.

It is challenging for artists to identify all the opportunities, make the necessary contacts and negotiate deals with so many players. Many artists felt that they did not necessarily have the right skills for these tasks, yet they noted a general weakness in this area even within media arts production and distribution organizations.

Although one might think that film and video would find a natural market in digital TV, broadcast opportunities have not materialized in the way artists may have hoped. Artist-driven work does not easily fit into the commercial broadcasting agenda, notwithstanding specialty programming such as the Independent Film Channel, ARTV or ZeD. Some artists felt broadcasters did not genuinely care about quality programming.

The research team heard that documentaries, once a staple of television programming, have been negatively affected by the proliferation of digital channels. The pressures of filling programming grids combined with the relatively low revenues from digital subscribers have exerted downward pressures on documentary budgets. Digital channels have very limited budgets to commission the production of documentaries or purchase existing documentaries. This has translated into a reduction of time in which to produce work, and respondents felt that this has had an adverse affect on the quality of documentary productions.

The web has changed the dissemination of information about artists' work and exhibition opportunities, but few media organizations have the resources and technology to use the web as a broadcasting platform. Until broadband internet is more widely available, the exhibition of media work though the internet is still seen as problematic.

Some respondents noted that commercial movie theatres and repertory theatres do not generally show independent films because of box-office imperatives. Although alternative cinemas or programming organizations exist in various locations across the country, many respondents believed that their activities have not created an adequate and wide-reaching exhibition network for media works.

An important change in the sector has been the collapse of secondary markets in film and video. The educational sector is reluctant to purchase works, preferring to rent or asking for cheaper video versions of films. Community groups do not have the funds to rent or purchase work. This has had a serious impact on distributors.

Distribution

In general, the research team was told that the distribution network is uneven across the country, with no distributor of media artworks in the Atlantic region. Some respondents complained about a poor distribution system in Canada and raised questions about the ability of artist-run centres to market artworks. Marketing requires specialized expertise not necessarily found in artist-run centres, including the ability to negotiate secondary markets and navigate contractual complexities such as webcasting opportunities. Some respondents asked how organizations can be expected to do serious marketing work on their tight budgets.

In addition, some artists considered media arts distributors to be passive compared to industry distributors, because media arts distributors are not seen to be actively promoting works at festivals, fairs or other events. Some respondents believed that media arts distributors see their role simply in terms of making works available, by including them in their catalogue, rather than actively promoting them.

Distributors are sometimes frustrated by artists who, wanting to distribute their work at all costs, will deal direct and undercut the work done by distributors. Distributors also expressed equipment and support difficulties with regard to both disappearing formats (e.g., 16mm, S8, open-reel, 3/4") and new formats (e.g., CD-ROMs and DVDs). Generally, distributors are not eligible for equipment funding, except for special project funding. Many do what they can to find older equipment. Some distributors indicated that they would like to support audio works, but they recognized that they do not have the knowledge of the appropriate markets or venues in which to showcase the works.

Distributors lack sufficient funds to produce catalogues as often as they would like, to update their web sites or to produce other promotional materials for their large lists of titles.

Exhibition environments

Some artists expressed concerns about the ability of exhibitors to properly show new media works. The costs of installation and maintenance of technology-rich media works, especially new media works, are significant. Although museum and gallery settings seem a natural fit for presenting work, many galleries do not have the appropriate equipment, expertise and physical plant to support new media works. The long exhibition schedules of museums and galleries mean that technically-sensitive work, such as new media work, is prone to technical breakdown. Some new media artists told the research team that they have more opportunities to show their work in Europe where media works are more consistently programmed and facilities are better.

Video installations suffer a similar fate: many galleries do not have adequate facilities to properly show the work. In some cases, artists felt pressured to show documentation regarding the installation instead of the actual work.

Audio works also face specific challenges in dissemination and presentation. There is a very limited number of independent labels that produce and distribute audio work. Music stores generally stock popular titles that sell in relatively large quantities and are reluctant to stock independent productions, making it hard for audiences to discover new works. On the other hand, the web has helped some audio artists market and sell their works.

Exhibition environments for media art are changing. One respondent noted that some filmmakers are bypassing the festival circuit and turning to galleries to show and sell their work. This trend has been identified as "going from the black box to the white cube".

Audiences

Despite these exhibition and presentation difficulties in the sector, respondents noted that the popularity of many independent film and video festivals indicates that there is a significant audience for media artworks. Some artists have built their careers through festival opportunities. However, festivals are short-term, loosely networked events that do not necessarily constitute a structured exhibition circuit. In addition, many festivals have very specific mandates. Film and video artists indicated that it is difficult to assess which festivals are most suited to their particular work, and it can be expensive to submit work to a range of festivals because of the costs of duplication, mailing and entry fees. Many respondents expressed the need for more permanent venues to show media artwork, such as the Manitoba Cinémathèque in Winnipeg, Blinding Light in Vancouver and Metro Cinema in Edmonton. Festival organizers expressed their vulnerability to staff and volunteer burnout given the effort required to stage such events.

Artists told the research team that networking, including knowledge about which programmers and curators may be most receptive to particular works, is essential to increasing exhibition opportunities. They also lamented the lack of support they receive to deal with the promotion and distribution of their work.

Audience development in the media arts remains fragile. Although there is a sophisticated audience for many media works, many respondents believed that audiences could be larger. Other respondents noted that audience development requires knowledgeable and skilled staff and that long-term staff development is compromised because many initiatives are funded on a project basis.

Programmers

Artists told the research team that young programmers have had an important impact on the sector in the last ten years. Many young programmers are finding new work and new artists and presenting them to audiences that may not be large in number but are perceived to be influential. These programmers are affecting festival programs and bringing new artists to the attention of galleries and other larger institutions.

Critical discourse

Respondents also noted a lack of critical discourse about media art. There are few critics who understand the field well and very little publication about media art. Magazines and newspapers are a vital part of the artistic milieu and an important vehicle to educate and inform the larger public. However, these publications generally only provide reviews of Hollywood films or American independent films. Journalists who are interested in Canadian media artwork and understand the context in which it is produced are rare. Furthermore, magazine and newspaper editors have to be persuaded that there is an audience for

Canadian media artwork and that journalists should be covering it. Respondents indicated that they had much larger audiences at screenings, installations and events that were covered in the cultural pages of newspapers. While many Canadian media artists have gained recognition outside of Canada, they find that without knowledgeable critics and curators, their work and media arts generally does not get the attention it deserves at home.

4. Impacts of the Media Arts

Respondents told the research team that media art is a very modern and current form - "the art of our time" according to one. Media art appeals to youth, who were brought up in an environment that involves media such as TV and gaming. Respondents indicated that young artists are turning towards the media arts in significant numbers. Media art is also seen by media artists as the artform closest to popular culture, placing it in a unique position. Recent Canadian successes at art fairs and biennales are seen as having had an enormous impact on Canadian art, culture and society. There is much curiosity about media arts and media tools, and artists told the research team that the media arts provide a challenging and interesting way to explore intellectual and creative pursuits.

Although many respondents were concerned with audience numbers and public knowledge of the artform, many also noted that the impact of the media arts cannot and should not be measured in quantitative, "box office" terms. Some artists indicated that it is the work itself that matters much more than the audience numbers. Many indicated that the real impact is qualitative; media works create opportunities for reflection and dialogue. As one respondent stated, media art "needs to be digested by the people, encourage discussion, and have the opportunity to instruct, enlighten or entertain an audience." The media arts are seen as having an educational aspect, affecting public attitudes and understanding. A distinction is often made between art and industry: the goals of art are often social and/or political in nature, not simply entertainment.

Interviews reiterated the importance of this broad reflection on culture and society. "Art" implies space for artistic freedom and freedom of speech, thereby contributing to the democratic process. The media arts are seen to have an impact on all aspects of political dialogue, including the questioning of technology, media, culture and society. Specifically, respondents told the research team that media artists are examining and grappling with issues related to the omnipresence of technology in everyday life. Media artworks also examine globalization and the world economy, which are themselves influenced strongly by technological innovations. Respondents noted that the media arts provides an alternative and counterbalance to industry-dominated culture.

The media arts exist at the crossroads of art, science and technology. Respondents noted that media art often exerts influence on the direction of culture and new uses of technology, even functioning as part of the research and development infrastructure of technology in general.

The media arts are also seen to have an impact on business. Many respondents noted that innovative techniques, technology, formats and perspectives pioneered in the media arts have been appropriated by mainstream TV, advertising and commercial film. Impacts and interactions are not unidirectional,

however, as some respondents indicated that work done in the industry can also influence media artworks.

Media works – especially in video – have also been used to document social issues and to work toward social change. This is especially true in some organizations' work with disadvantaged and marginalized groups, including youth and Aboriginal people.

Aboriginal respondents felt that media art is a direct reflection of Aboriginal culture and makes Aboriginal culture more accessible to the world in general. The media arts are seen to be an important outlet for artistic endeavour in Aboriginal communities.

There were also a few comments regarding the role of media arts in the economy. One respondent felt that the media arts make significant economic contributions to society, especially through festivals. Another respondent noted that, in a content and knowledge-based economy, media art is essential.

Some media artists suggested that the media arts sector offers interesting models of labour, cooperation, industry and entrepreneurial spirit. Media artworks presents unique insights and perspectives, and media art production involves distinct processes and experiences not easily replicated in the media industries. Like other contemporary art disciplines, media art offers insights or ways of understanding and coping with contemporary life, its difficulties and complexities.

5. Challenges, Needs and Gaps in the Sector

Distribution and Exhibition

Many respondents identified distribution and exhibition as a large gap within the sector. Respondents noted that many media artworks are not reaching their full potential audiences. Specifically, some respondents indicated that a number of Canadian media artists have strong international reputations but are relatively unknown at home, because of a lack of appropriate exhibition opportunities for their work. Respondents spoke specifically of the "incredible quality of Canadian new media work" and lamented the fact that this work is generally not known to Canadians. Even in a large centre like Toronto, the research team heard that there is a shortage of appropriate venues for this type of work.

Many respondents indicated that, through better distribution, Canadian media artists could have more exhibition opportunities and greater impact nationally and internationally.

Given the significant volume of activity in the media arts, many respondents were disappointed with the fact that museums and larger galleries were not programming many media works. Programming at these institutions was seen to be narrowly focussed on better-known artists. Furthermore, institutions are confronted with equipment and technical difficulties in presenting media artworks, especially new media works.

Many respondents expressed a need for increased funding for exhibition. Some indicated that new and innovative strategies are needed to help works reach larger audiences. There was a strong feeling that significant money and effort should be devoted to expanding audiences for artist-driven work. Some respondents also noted that programming organizations play a key role in the sector, and that their exhibition activities need to be strongly supported.

Some respondents noted that marketing and audience development are highly specific endeavours for which few people in the sector have the appropriate training. Given the human resource issues with which media arts organizations are grappling, this is not an easy problem to solve.

Many respondents noted the absence of the necessary infrastructure to adequately support the presentation of work in film, video, audio and new media. This issue is especially critical in audio and new media where venues are inadequate (new media) or almost non-existent (audio). In film and video, there are challenges in the fact that there are no ongoing venues to show work. This makes it difficult to sustain audience development activities.

Other respondents noted that the media arts sector does not have active agents or dealers marketing works, such as in the visual arts sector.

Visibility, education, literacy, discourse

Many respondents spoke of the need to improve the visibility of the sector. Some respondents indicated that more media literacy work needs to be done in schools, universities and museums to educate younger generations. Others noted that art history courses should include instruction on media works. Some saw a strong need for more media artists to be included in arts education programs and activities. Many saw a need for youth to be educated that media artworks are not quite like popular TV programs.

Respondents also pointed out that recognition by larger galleries and museums could lead to increased public recognition and legitimacy for media works. However, some questioned the support for media works from the museums sector, because of a limited investment of resources and a lack of media arts curators in the museums sector. Because of these factors, the collections of many museums and galleries are very limited.

Some respondents argued that a new media arts institution was required to raise the profile of media art.

Many respondents expressed a desire for more discourse about media works. There are few critics who have the knowledge and expertise to critique media works. This is a perceived gap in both print and electronic media. There are few magazines devoted to discourse about media artworks.

Markets

The economic model of the sector is not readily apparent. There are few opportunities to show works and even fewer opportunities to sell works. Broadcasting opportunities in general have not turned out to be what was hoped for 10 or 15 years ago. The new digital TV channels have not proven to be a significant source of income for artists, as was hoped. The educational market for media works is also weak.

Interviews revealed disagreement in the sector over the potential of the large home entertainment market. Some feel that media artworks will never significantly penetrate the home market (through TV and broadband internet), while others feel that programming opportunities could and should be developed, through both TV and the internet.

There is a need in the sector for better distribution networks and more exhibition outlets with adequate means to pay artists' fees. Currently, artists' fees paid by events such as festivals are relatively small.

Money

Despite the recent additional funding for the media arts through the Canada Council, one area of common agreement is that more funding is needed to combat a variety of problems, from human resource and staffing issues to the overall financial instability of many organizations. In one organization, the "human resources deficit" was so acute that the administrator noted that the main staff function is grant-writing.

One respondent wondered how the private sector might be enticed to invest in the media arts. Given the limited revenue-generation capabilities of most media arts organizations, private investment would be helpful. But respondents noted that it is time and energy-consuming for them to raise funds. Many artists feel ill-suited to this kind of development work, which takes away from creation and reflection.

Increased political support was also a fairly commonly expressed need. Some respondents expressed frustration at the constant need to educate audiences and others and the endless demand for justification of their activities.

History and archiving

Some in the sector wish to see a concerted effort to preserve the vanishing history of the media arts. This would require an infusion of time and money. Some archival and historical information does exist in the sector, but there is a need for this information to be better preserved and better known. Organizations fulfilling these functions expressed a need for specific funding for their custodial activities to allow them to upgrade and update their archives and equipment.

There are also issues around the archiving and preservation of disappearing media such as 3/4", open-reel and 16mm film. This raises philosophical and practical concerns for filmmakers and for film service organizations.

Aboriginal challenges and needs

Aboriginal respondents expressed a desire for funders to have a better understanding of the special challenges and needs of the Aboriginal community. One respondent whose organization serves Aboriginal people in an urban setting noted that her members generally have very low income and therefore "need everything". Organizations in this situation cannot generate revenues from members. One organization noted that while they do have state of the art equipment, they only have one of everything, which limits equipment availability for their members.

Media art in Aboriginal communities is in an emerging state, and a number of organizations are experiencing staffing problems. Organizations do not have adequate staff to ensure comfortable growth

but rather are overworking their current employees. Organizational leaders are concerned about the possibility of employee burnout. Money issues were also frequently cited by these organizations.

Mentoring

A number of Aboriginal artists and organizations spoke of the need for mentoring to develop interest, expertise and activity in the sector. Other artists, including some culturally diverse artists, also expressed a need for mentoring.

Diversity

Some of the concerns and issues expressed by culturally diverse and Aboriginal artists were strongly related to concerns expressed by other artists. For instance, some expressed concern for the opportunities for culturally diverse artists to sustain careers in the media arts. An example of this was the excitement felt about ten years ago over the emergence of film directors of various cultural backgrounds. Now, only a few have managed a career as feature film directors. This situation also points to the general problem of developing an audience for Canadian cinema.

Some respondents believed that the general absence of curators in the media arts sector is felt even more acutely in the exhibition of works by culturally diverse artists. Criticism of representation on race and ethnicity was also found to be seriously lacking.

One respondent noted that the access to culturally specific work, workshops, seminars, programming, exhibitions and discourse is uneven across the country, even in large urban centres.

Some respondents mentioned the need for mentorship programs and workshops for diverse youth to expose them to various aspects of the media arts. Media literacy was also noted as crucial to the development of a viable media arts community.

Networking challenges

Media artists and organizations expressed a desire for more networking, collaboration and even possibly some sharing of resources. Respondents stated that they wanted to know more about what others were doing and what resources they possessed. Artists and organizations in more isolated regions also expressed a need for information and exchange, including more opportunities to travel to other communities and to bring in national and international artists to their own communities. Aboriginal respondents also expressed a need for more networking among both Aboriginal and non-Aboriginal media artists and organizations. Since most of the organizations the research team spoke to were struggling with staffing problems, they felt that they did not have enough time to network.

Some artists expressed the desire to connect to networks and key players that could have an impact on the exhibition opportunities for their works.

Some respondents indicated interest in a national media arts conference, which could be an important step in the creation of a climate conducive to the development of the media arts in Canada.

Organizational challenges

In an effort to remain relevant to their communities, some artist centres' mandates have evolved, allowing them to pursue new areas of endeavour, such as audio or new media production, rather than simply film or video. This has led to some discussion of potential overlaps between organizations in the sector.

Artist-run organizations are publishing, distributing and disseminating information and artwork, in part because others are not doing so. However, these efforts have been insufficient to raise the profile of the sector to the level of recognition desired by many artists.

The research team was told that many artist-run organizations are broadening their roles in the sector beyond simply providing equipment and access, in some cases acting as producers of works. In other cases, media arts centres are seen to be places to access expertise even more than equipment. In this model, organizations need to provide knowledgeable staff with the expertise that artists need to get their works done.

The changes in centres' roles modify the landscape considerably and have caused some tension in the sector. Some new media centres, in particular, believe that the film and video access centre model should not be the predominant model upon which the new media sector is built. Centres that do not have a major role in providing equipment feel that their contributions, based on the expertise of their staff, are not being adequately recognized.

The increase in the number of artists owning their own equipment has led to the sense of a more scattered community. This is a challenge for artist centres in a couple of ways. First, it is harder to attract members that have their own equipment. Second, the sense of community and the networking opportunities that centres can provide are diminished if artists are less willing to participate.

A specific challenge for many organizations is reaching younger artists – bridging any existing "generational gaps" – thereby renewing the organizations and ensuring that their services remain relevant. Many respondents described a need to find ways to engage younger people in the artist-run centres, to provide them with a better understanding of the potential there is to produce significant art

through collaboration. From the other perspective, however, some younger artists expressed misgivings about the services and efficiency of some media arts centres.

Many organizations in the sector are struggling to find funding for equipment which can quickly become outdated.

One interviewee pointed out ongoing challenges with governance issues in cultural organizations, such as recruiting knowledgeable and involved board members who will help ensure that organizations are well-run and adequately financed.

6. Media arts data strategy

Information and data needs

The need for communication within the sector was a clear theme among interview respondents. Many spoke of the need for discussion and collaboration within the media arts. Others indicated a need for networking and information-sharing.

Specific information needs include:

> ➢ grants and funding available;
> ➢ artists and organizations working in the media arts (names, locations and activities);
> ➢ exhibition and presentation opportunities (including festivals); and
> ➢ a history of the media arts, especially while early works are still accessible (due to changing equipment).

Some respondents noted a need for research and information that could be used to raise the profile and demonstrate the cultural value of the media arts in Canada. This information is also important to government and representative groups in the sector. The Canada Council, the Department of Canadian Heritage and the Independent Film and Video Alliance have identified a need for qualitative and quantitative information on the media arts to help them achieve the goals of raising the profile of the sector with financial decision-makers and the broader community. These organizations, and others in the sector, need sector-wide data to inform policy development, program development, service delivery and advocacy initiatives. They also require the ability to track and monitor the media arts sector over time. This report provides significant qualitative information on the sector, and this section contains recommendations for the development of statistical capacity.

Lack of data

As identified by the project partners and the recent CQAM study on the media arts in Quebec, quantitative data is clearly lacking in the media arts. In contrast, four annual Statistics Canada surveys examine various parts of the media industries. Statistics Canada also provides information on the economic and employment impact of the broad arts sector in Canada. However, it is clear that these figures understate the true impacts, as many cultural activities are excluded or poorly captured, including the media arts and media artists.[4] Media artists are also poorly captured in the Standard Occupational

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[4] Statistics Canada's economic impact methodology groups media activity into the general area of cultural industries. The media components of this data are broadcasting and the film industry. Although new media is also included as a component of cultural industries, no data on this topic is currently available from Statistics Canada. There is also no distinct category for media artists similar to that for visual artists or for craftspersons. Other than being included as visual artists, the only location where media artists could be captured in economic and employment impact figures is if they were involved in the advertising industry.

Classification categories. There is no category for "media artist" or even "filmmaker"; the closest categories are "Producers, directors, choreographers and related occupations" (which includes a number of artforms), "Film and video camera operators" and "Painters, sculptors and other visual artists". Other categories related to media activities are dominated by those who work in the media industries rather than the media arts sector. These inadequacies mean that media artists are not reflected in labour market statistics, including employment and income levels.

Focus on exhibition and sale of artists' work

Much work needs to be done to fill information gaps about the financing and activities of the sector. Given the needs in the sector concerning the exhibition, presentation and sale of artists' work, data on these aspects of the sector is seen as the top additional information need.

The media artist survey, a draft of which is included below, will help fill some of these information gaps. The survey is designed to provide information on media artists (location, language and demographics), the areas in which they work, their personal income (and sources of income), media artworks completed, and significant information about their most recent media artwork. This information can be used to track and monitor this important component of the sector, with the goal of improving opportunities for works to be shown.

The collection and dissemination of data on media arts organizations, also outlined below, will provide significant information on key activities and finances of organizations in the sector. Given the needs concerning exhibition and presentation of artists' work, data on audiences is seen as the most important piece of additional information from organizations. The research team therefore recommends that Canada Council collect audience figures in a more systematic manner. In addition, other pieces of statistical information, such as works produced and membership, could also be collected to provide a broader picture of the sector and enhance the ability of Canada Council to track trends in the sector. This data should be analyzed and communicated back to the community in summary form, respecting the confidentiality of individual applications.

Some centres told the research team that they need data and tools in order to improve their own services and activities. However, others expressed concerns about the capacity within their organizations to collect and submit more information. This is an important concern, especially given the sector's lack of human resources (discussed in other sections of this report). The research team believes that the data strategies outlined in this section must be integrated with a series of measures to improve distribution and exhibition.

The research team also heard that audience work is not just about "bums in seats" and that centres could be concerned that they would be evaluated by the Canada Council too strongly on the basis of their attendance figures. Specifically, some media arts organizations noted during the research team's interviews that much of the activity in the sector cannot be adequately quantified and, furthermore, that the most important aspects and impacts of the sector can only be understood in qualitative terms. Qualitative information on the sector is extremely important and lines of communication should be available to gather and discuss conditions in the media arts sector.

The Canada Council will have to make it clear that evaluation is not just about "bums in seats" but that the measurement of exhibition opportunities is an important step in the process of enhancing those opportunities. The project partners should clearly communicate to the sector that the collection of this information will help them achieve the goals of raising the profile of the sector with financial decision-makers and the broader community.

A national media arts conference, along the lines of a Media Arts Summit, could help to improve qualitative and quantitative information-gathering. A conference, larger in size, scope and profile than the current IFVA conference, would provide a significant opportunity for communication between government, service organizations, media arts organizations and media artists. Many artists and media arts organizations told the research team about their need for more information and networking. A wide-ranging national conference would start to bridge that gap. The conference could also be used as a launching-pad for the media artist survey and an opportunity to discuss the importance of collecting and analyzing data on the sector.

Another means of helping to bridge the networking and information gaps in the sector is the establishment of a broad-based website with significant information and links to resources in the media arts. Information pieces that could be put on this site include a map of Canada Council-funded media organizations, with a brief description of their activities. This, too, would contribute to networking and information-sharing in the sector.

Media artist survey
Canada Council currently obtains significant information regarding organizational finances and activities through the grant application process. For individuals, the data collected generally pertains to the use of a grant in the production process. This does not provide information about what happens to a work after its production is complete. For this reason, the research team recommends that Canada Council take the lead in establishing a survey of media artists to collect data on the exhibition and presentation of artists' work from as many artists as possible.

In order to ensure feedback from media artists and to foster links between media artists and media arts centres, the research team recommends that the media artist survey be implemented using existing media arts centres as the main contact point. Canada Council should provide funding and training for centres to hire or allocate staff to administer a survey of artists in their area. Contacts could be made by telephone, ideally with a follow-up in-person interview. The research team believes that media artists would be more likely to respond to requests for information through personal contact with others within the media arts community. For media arts centres, the survey would be another opportunity to keep in touch with media artists in their communities (both members and non-members). Centres will also gain insight into the needs and priorities of arts funders in making the case for the media arts. These benefits, along with the funding and training noted above, will hopefully ensure the voluntary participation of a number of centres in the survey process.

The Canada Council, through its Public Affairs, Research and Communications Division, should take the lead in the process of questionnaire development, piloting and data analysis related to the media artist survey. In a pilot phase, a limited number of centres could test the survey instrument. The survey could then be revised as necessary and rolled out to all participating centres. At this roll-out stage, a process will have to be established to allocate survey contacts in communities with more than one participating centre.

The contact list of artists could be developed by using Canada Council grant applications, other funding organizations' grant applications (including provincial arts councils and local arts funders) and the membership lists of member-based organizations (mainly media arts production centres). The privacy of arts council grant applicant information will have to be respected, and arts councils may need to develop procedures to obtain the approval of grant applicants in the survey process.

Draft of media artist survey

Brief explanation of survey, why it's important, use of results.

Artist name, location, male/female, age
Aboriginal / visible minority
Most common working language (E/F/other _____)
Area in which you most commonly work   film   video   audio   new media   other _____
For how many years have you worked in the media arts (post-graduation)?

Number of media artworks completed in past 3 years _____
(must have had creative control over work)

Please estimate your overall average yearly income over past 3 years $ _____
Please estimate your average yearly income from your artistic activities over past 3 years $ _____
What have been your main sources of financial support for your artistic activities in the past three years?
       -government arts agencies _____ %
       -earned through media arts projects (i.e., sales, exhibition, etc.) _____%
       -other media-related work (e.g., jobs in industry/commercial media) _____%
       -personal contribution _____ %
       -support from family _____ %
       -other _____ %

Please fill out the following information for your most recently-completed work.

Type of work: film   video   audio   new media   other _____
Year work completed   _____

Exhibition and distribution
Number of times this work has been shown
_____

Where was this work shown? (please check all that apply)

	In Canada	Outside Cda
festival	_____	_____
gallery/museum	_____	_____
media arts programming organization	_____	_____
web	_____	_____
TV	_____	_____
movie theatre (excl. festivals)	_____	_____
other venue	_____	_____

Who distributed this work?
Yourself   _____
Artist-run distributor   _____
Other distributor   _____

Are you satisfied with the exhibition of this work?
Yes No

Why or why not? (briefly)

_____
_____
Finances and production
Cost of the work $_____
Sales of the work $_____

To whom was this work sold?
_____   _____
_____   _____

Was this work made with the help of an artists' centre?   Yes No

Was this work made with the help of volunteer workers? Yes No

Sources of financing for this work *(please estimate %)*:
All government sources   _____%
All earned (i.e., sales,
      exhibition, etc.)   _____%
Personal contribution   _____%
Other private donors   _____%

Did you personally make any money from this work? Yes No
If yes, how much? $_____

Data strategy for organizations

Digitization and analysis of current data

Canada Council currently obtains significant information regarding organizational finances and activities through the grant application process. To date, this information has remained on paper, which does not allow for data interpretation and analysis to be reflected back to the media arts community. This information could be collected, data-entered, analyzed and fed back to the community to provide insights into the state of organizations in the media arts sector. Although this data does not cover the full range of organizations in the media arts sector, it does cover a wide range of organizations, and it is a readily-available source of data.

The research team therefore recommends that Canada Council investigate means to input, interpret and analyze this important source of data. There are a number of firms that specialize in data entry or statistical analysis, and Canada Council may wish to consider contracting with one as a means of making the data that is currently on paper available and accessible for the project partners and the media arts community. The Ontario Arts Council has implemented some aspects of this process, with some success.

The research team further recommends that Canada Council share information about this project with other funders to attempt to ensure that data for organizations funded by other federal, provincial or local organizations (but not funded by Canada Council) be captured.

Below is a summary table of the data currently included on Canada Council's financial forms in their media arts annual activity programs.

Media arts financial forms	Cinémathèques	Distribution	Festivals	Production	Programming
Revenues					
Earned	x	x	x	x	x
Fundraising	x	x	x	x	x
Grants	x	x	x	x	x
Equipment acquisition (production equipment only)				x	
Total revenues	**x**	**x**	**x**	**x**	**x**
Expenses					
Administration	x	x	x	x	x
Collection	x				
Distribution		x			
Interpretation and documentation			x		x
Marketing, audience development and outreach	x		x		x

Other organizational activities	x			x	
Presentation	x				x
Production equipment				x	
Programming			x		
Programs and services				x	
Promotion		x			
Publication	x				
Reference library	x				
Total expenses	**x**	**x**	**x**	**x**	**x**
Net surplus (deficit)		**x**		**x**	
Accumulated surplus (deficit)				**x**	
% of festival expenses related to presentation of Canadian independent media artworks			x		

Additional information about funded organizations

In order to make a compelling case for the media arts to financial decision-makers and the broader community, more information about media arts organizations in the sector is also important. Given the challenges in the sector concerning exhibition and presentation of artists' work, data on audiences is seen as the most important piece of additional information from organizations. The research team therefore recommends that Canada Council collect audience figures in a more systematic manner.

In addition, other pieces of statistical information should also be collected to provide a broader picture of the sector and the ability for Canada Council to track trends in the sector. As just one example, data on membership figures at centres would be helpful, especially given the changes in the sector due to the digital revolution. Other data elements that would be of interest include: works produced at centres, works produced *by* centres, screenings, exhibitions, installations, artists' talks, workshops and publications. With this data, Canada Council would have the ability to analyze and report summary data concerning organizations' activities in the media arts sector.

This data could be collected by the addition of brief statistical information to the standard financial pages used by Canada Council applicants. Outlined below are the key elements of statistical information that could be captured, at least for an organization's most recently completed fiscal year.

Summary statistical information from media arts organizations

Statistics on media arts organization activities	Number	Attendance
Works produced		
Film / video / audio / new media works produced by members of your organization		███████
Other film / video / audio / new media works produced at your organization		███████
Works produced by your organization		███████
Public activities		
Screenings		
Exhibitions		
Installations / Performances		
Artists' talks		
Workshops		
Publications (excluding newsletters)		███████
Membership		
Individual members		███████
Organizational members		███████

Data collection by organizations

A key issue is the capacity of organizations to fulfill this additional requirement, especially given the concerns that the research team has heard about lack of human resources in the sector. To alleviate this concern, the research team recommends that organizations be given appropriate tools to deal with this. These tools could include the following:

➤ Money: A small "bonus" amount could be allocated to organizations specifically to set up an information gathering strategy and pay for the time involved in gathering the data. The research team suggests that an amount in the order of $5,000 be made available to help organizations set up a data gathering strategy.

➤ Techniques: The research team has heard that not all organizations collect audience statistics, and some that do collect these figures do not do so all of the time. Some "best practice" techniques could be shared among organizations in the sector to help them collect these figures more consistently. Techniques could be as simple as the distribution of tickets, buttons or bracelets at events.

Organizations that wish to develop a full-fledged audience development strategy should be strongly encouraged to do so.

Information about unfunded organizations

Ideally, information about unfunded organizations could be collected to provide a broader picture of the sector. However, the research team believes that it is unlikely that unfunded organizations would voluntarily complete a detailed questionnaire on their finances and activities. For this reason, the research team does not recommend attempts to collect data from organizations not funded by the main funding organizations in the sector.

Strengths and weaknesses of the approach outlined here

The research team believes that the approach recommended here is feasible and cost-effective. In terms of feasibility, the research team believes that the strategy is clear and achievable. Both the media artist survey and the data collection on media arts organization activities make use of available information and means to achieve the goal of having more information on the media arts.

The media arts organization strategy builds on information that some organizations in the sector already capture for their own use or for submission to other funders. Ontario-based organizations are currently required to report very similar figures to the Ontario Arts Council.

The approach outlined above should be cost-effective. The collection and analysis of data on media arts organizations should not be particularly expensive. More resources would be required to implement the media artist survey, but the survey process should achieve a number of goals beyond the collection of data. An important goal would be increased communication between artist-run centres and media artists in their communities.

The data strategy outlined here will not allow the Canada Council, the Department of Canadian Heritage and the Independent Film and Video Alliance to capture all of the information that one might want to know about the media arts sector. Specifically, the data strategy will not establish definitively how many artists work in the media arts sector nor how many also work in the media industries. Nor will it establish the exact number of organizations involved in the media arts sector. It would be very expensive to implement a full-scale survey of all media artists or organizations in the sector, and this type of survey would best be handled by Statistics Canada.[5] Given that it is highly unlikely that Statistics Canada will implement this type of survey, the research team believes that Canada Council would be best suited to take the lead on the data strategy components outlined here.[6]

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[5] However, the research team believes that response rates from individual artists would likely be low in this type of survey process.
[6] Canada Council may wish to undertake discussions with Statistics Canada on the categorization of media artists in existing surveys.

A difficulty with any survey of media artists is ensuring broad participation. The research team believes that the means recommended here will build interest in the survey process, and will give Canada Council, Canadian Heritage and Independent Film and Video Alliance staff the opportunity to show the merits of this process. Attempts should be made to conceive of innovative "media arts" ways of generating interest in the data strategy and its results.

7. Priorities for Action

To conclude the report, this section provides the Canada Council, the Department of Canadian Heritage and the Independent Film and Video Alliance with some recommendations regarding short, medium, and long-term priority areas for action to improve the state of the media arts sector in Canada. The priorities outlined in this section flow directly from the challenges, needs and gaps identified through the research team's interviews. The different priorities outlined below are by no means isolated. In fact, most of them are strongly intertwined and can be seen as a set of improvements that will make a significant impact on the media arts sector.

Specific recommendations on how to act on these priorities – other than the data strategies outlined in the previous section – are beyond the scope of this study, but some suggestions will be provided.

Many of the priority initiatives outlined here will require partnerships with key players, including broadcast and digital TV partners, the museums and galleries sector, the private sector, the educational sector, different levels of government, and others.

Short-term

Distribution and Exhibition

The top priority for immediate action is the development and implementation of an integrated package of activities to improve the distribution and exhibition of media artworks in Canada and, in the case of distribution, internationally. The research team clearly heard from many artists that they wish that more people could have seen their works. The research team was also told that Canadian artists need more opportunities to show their works, and that the Canadian distribution system needs to be improved to facilitate these opportunities. The data strategy outlined in the previous section is one component to this. By providing the project partners with greater information about exhibition opportunities, the data strategy should allow them to make their case for the improvement of distribution and exhibition of Canadian media artworks.

Another important component is strong support for exhibiting and presenting organizations that wish to undertake audience development strategies. Given the complexities of audience development, many of these organizations would need to develop their expertise and human resources to achieve this goal. Past successes in this area could be shared among organizations.

Many artists expressed frustration at the relative lack of coverage of their works – and indeed any media artworks – on TV. Others spoke of the potential for reaching audiences through the internet. Another component of the effort to improve exhibition of Canadian media artworks is the development of

partnerships with broadcast and digital TV partners to ensure that Canadian media artworks have a place on TV. Similarly, opportunities to show more works through the internet should be developed.

To improve distribution and exhibition through museums and galleries, education and development work should be implemented, ideally in conjunction with key players in the museums and galleries sector including, for example, the Canadian Museums Association.

Information Sharing and Networking

Another short-term need in the media arts sector is for information sharing and networking among artists, arts organizations, service organizations, and funding organizations. Many artists and organizations interviewed for this study spoke about their need for information sharing and networking. These activities are also crucial in providing feedback of qualitative information to funders about the state of the sector and about funders' programs and services.

Two possible mechanisms for improved information sharing and networking were outlined in the data strategy section. First, a large national media arts conference, along the lines of a Media Arts Summit, could be convened to provide a significant opportunity for communication between media artists, media arts organizations, service organizations, government organizations, and others interested in the state of the media arts sector. It is important that this conference be targeted to the broadest possible range of players in the media arts community. This type of wide-ranging conference could also provide the project partners with an opportunity to promote the data strategy and its intended impacts.

Second, a website with broad-based media arts information and links to resources in the media arts could be developed. It is important that this website not be seen as functioning solely for the sake of grant applicants nor for service organizations' members. This speaks to the need for a collaborative effort, as does the need for wide-ranging information that no single organization has. (A generic site for the media arts could be registered, such as www.media-arts.ca. One respondent spoke of the value of an analogous portal with wide-ranging information for Aboriginal peoples, www.aboriginalcanada.gc.ca.)

Useful information that could be put on this site include a map of Canada Council-funded media organizations, with a brief description of their activities. This could help, for example, an emerging media artist find out about resources in her field or in her local community. Links to other sources of information on the media arts, including topics such as the sector's history, practical guides (e.g., how to integrate media arts in education; what resources and networks are available for culturally diverse artists) and successful practices (e.g., on touring media artworks), could also be developed for and maintained on the site.

An additional activity that would help in both the exhibition of works and networking in the sector would be expanded funding for tours and travel. Many in the sector, especially those in more isolated regions of the country, saw a need for more opportunities for works to tour and for artists and organizational representatives to travel. The travel component could include opportunities for artists and organizational representatives to see works and activities in other parts of the country and abroad, as well as opportunities to bring national and international artists into their communities.

Money

Many artists and organizations in the sector spoke of their need for increased financing for their activities, staffing and services. The Media Arts Section of the Canada Council should do its utmost to ensure that these needs are met through increasing funds for the Section. If a redistribution of Council media arts funding needs to take place, the media arts sector should be consulted fully in this endeavour.

Many in the sector also thought that initiatives could be undertaken to encourage the private sector to contribute to the media arts. A number of organizational representatives shared with the research team the impacts that they see their activities having on the media industries and other technologically-based companies. They wished to see this impact recognized and translated into more resources to improve their services. Many believed that this would be mutually beneficial. They expressed the need for information, tools and assistance in doing so.

Part of the challenge in raising money is making the case for the media arts to financial decision-makers in government and in private-sector companies. Some of the information and tools provided in this report should allow the Canada Council, the Department of Canadian Heritage, the Independent Film and Video Alliance and others involved in the sector to make an effective case for the media arts.

Medium-term

The priorities outlined in the medium-term and long-term sections are not necessarily lower priorities than the preceding activities. They are, however, priorities which cannot be achieved over a short time frame, due to the need to strategize, plan, consult, communicate and integrate a range of activities.

Managing the Landscape

The research team heard that production centres are fairly accessible across the country. Some respondents specifically lauded the Canada Council's efforts in helping to achieve this goal. However, the research team also heard that many centres are dealing, for example, with serious human resource issues. Ways of managing the landscape, addressing competing priorities, and managing such a varied and diverse set of practices within the sector should be developed by stakeholders and Council. For example, Council has to attempt to accommodate the funding needs of a range of centres for both

equipment and expertise. Interviews were split on how to achieve this, which speaks to some tensions in the sector with regards to the possible duplication of services or overlap of mandates.

In addition, some respondents, mostly from new media, felt poorly served by the current structure at Council. Discussions and feedback about these concerns should be undertaken.

Long-term

Profile and Recognition of the Sector

Although all of the activities above would contribute to the profile and recognition of the sector, it should be noted clearly that the most important long-term developmental activity is a concerted effort to raise the profile and recognition of the sector. Many artists and organizations lamented the lack of recognition of the media arts sector, both within the arts and in broader Canadian culture.

Initiatives such as a collaborative effort between the Ontario Arts Council and TVOntario to showcase works funded by OAC were seen as a great way to increase the profile for film and video works. More initiatives such as this should be considered, and other initiatives should be developed for audio and new media works.

Artist-run organizations are publishing, distributing and disseminating information and work in part because others are not doing it. However, these efforts are insufficient to raise the profile of the sector to the level desired by many artists. Other means of disseminating information about the sector should be explored, such as developing compilations of works with accompanying curriculum. Specifically, partnerships with all levels of the education sector could be developed to improve media literacy and knowledge of the contribution of Canadian media artworks to Canadian culture and society.

In addition, a high-profile national media arts conference or other event would help to connect media artists and organizations and create a synergy to move the media arts forward.

Artists' Work and Remuneration

Many media artists told the research team that, despite substantial productivity, they were not able to make a living from their artwork. Many artists expressed the desire for significant efforts to be made to attempt to improve artists' remuneration through a greater commitment to artists, a commitment that must be reflected in greater recognition of artists' work and more substantial financial support.