

Culture in Montréal: Economic Impacts and Private Funding

November 2009



Chambre de commerce
du Montréal métropolitain
Board of Trade of Metropolitan Montreal

A study conducted by the Board of Trade of Metropolitan Montreal thanks to the financial support of the Ministère de la Culture, des Communications et de la Condition féminine du Québec and the participation of Culture Montréal and the Conseil des arts de Montréal. Economic and statistical data were compiled and processed by Carole Deniger, Consulting Partner for Secor Consulting.

Table of Contents

Message from the President and CEO	1
Highlights	2
What is Montréal's cultural sector?	3
I. Culture at glance: A statistical profile	5
General observations	5
Statistical profile of a diverse sector:	6
II. The economic importance of culture	8
Job creation	8
Booming growth	9
High added value	10
III. Private funding of the arts sector	12
Funding for the arts organizations	12
Survey: Contribution from the business community	15
Testimonials from patrons of arts	18
IV. Conclusion	22
Appendix	23
Sectors included in the definition of cultural sector	23
Results of the on-line survey	26

With the financial support of:



With the participation of:



Following the Rendez-vous:



Chambre de commerce
du Montréal métropolitain

Board of Trade of Metropolitan Montreal

380, Saint-Antoine Street West, Suite 6000, Montréal (Quebec) Canada H2Y 3X7 ☎(514) 871-4000 📠(514) 871-1255 www.artofbusiness.ca

Message from the President and CEO of the Board of Trade of Metropolitan Montreal



By Michel Leblanc

Without a doubt, the soul of our society is driven by that intangible quality called “culture,” which both weaves our social fabric and defines our collective identity.

Culture is also a tremendous lever of economic development and wealth creation.

Montréal definitely has large reserves of cultural capital, as we have a creative, vibrant and open metropolis. Thanks to this cultural expansion, and fostered by its unique history and linguistic situation, Montréal has an enviable international reputation, a source of tremendous pride for all Montrealers and for the Board of Trade of Metropolitan Montreal.

The first goal of this study is to document this observation. For example, we can see that the cultural sector employs 96,910 people in Greater Montréal and generates direct spin-offs of about \$8 billion, or 6% of the GDP of the metropolis. This is no small contribution!

It is not surprising that cities around the world increasingly understand this reality. Culture is therefore a part of the systematic integration of creativity and innovation into sectors that are considered more traditional, with the result being high added value. For these cities, the economy of knowledge and creativity becomes an engine for enhancing cultural wealth.

While our cultural sector is economically vibrant, its “creative core” is still fragile. This is the second finding of this study.

In the cultural sector, artists have the most precarious jobs. Although this is nothing new, we now have data that document this situation.

Finally, the third finding of the study is that the involvement of private sector companies with artistic organizations, although generous, has not yet reached its full potential. In particular, the private funding of culture is very unequally distributed, and certain organizations, often the smallest, struggle to obtain essential private support so that they can fully develop and achieve a certain degree of longevity. We need to find mechanisms to correct this problem.

Of course, many companies have already contributed to a number of promising initiatives in this regard. Fortunately, Montréal can rely on the generosity of major philanthropists from the business world, who are incredibly dedicated to supporting our artists and creative minds. Their commitment can often make all the difference. But are there enough of them? Could the bridges between the worlds of business and the arts be reinforced? And how do we ensure that organizations that have achieved excellence have the means to share our cultural creativity beyond our borders?

One thing is certain: we cannot ignore culture or downplay its impact on our social cohesion, our identity, or our economic development. This study both provides evidence of the economic fervour of our cultural sector and represents a call for business people to help this sector flourish. We should cherish this unique treasure and develop reinforcement strategies so that our cultural expansion can develop even more and fully contribute to wealth creation for both artists and society as a whole.

Highlights

- The cultural sector is experiencing strong growth in the metropolitan region of Montréal. In 2008, there were 96,910 direct jobs in this sector for an annual growth of 4.6% over a ten-year period, or almost three times the total average of the labour market, which is 1.7% over the same period.
- Montréal's cultural sector is over-represented compared with the rest of Quebec: 69% of the jobs in the province are in Greater Montréal compared with an average of 49% for all Quebec industries
- **The average annual salary of cultural sector workers is \$44,000**, which is slightly below that of other industries (\$48,547). However, this sector is characterized by a significant salary disparity.
 - **The average salary of artists, authors and performers is \$24,400.** These jobs are the lowest paid of the cultural sector, or barely more than half (55%) of the average salary.
 - In contrast, certain sectors such as architecture, radio broadcasting, television broadcasting, and interactive games offer salaries that are well above the average at \$60,000.
- The overall economic annual spin-offs (direct and indirect) of the Montréal cultural sector have been calculated at \$12 billion. **The direct contribution to the economy is \$7.8 billion, or approximately 6% of the GDP of the Greater Montréal region.**
- **The cultural sector generates more indirect jobs** than the majority of companies in the service industry.
- The 294 artistic organizations supported by the Conseil des arts de Montréal **receive 21% of their funding from the private sector**, which includes 14% in donations and 7% in sponsorships. These percentages vary a great deal depending on the organization's budget and field of activity.
 - While organizations with an annual budget of less than \$500,000 only obtain between 8% and 12% of private funding, organizations with more than \$500,000 for their annual budgets receive between 15% and 27% in private funding.
 - The fields of literature (3%), dance (10%) and theatre (13%) receive much less in the way of private funding than the fields of music (24%), the visual arts (25%), and festivals (38%).
- One quarter (25.5%) of businesses surveyed by the Board of Trade contribute to the private funding of artistic organizations.
 - Culture comes in fourth in terms of the sectors in which business people become financially involved, after health, social exclusion, and education.
- 23% of the companies surveyed by the Board of Trade are involved in the cultural sector through non-financial means.

What is Montréal's cultural sector?

The scope of this study includes three main components: **geographical region**, **cultural sub-sectors** and the **links in the value chain**. For the purposes of this study, these components are defined as follows:

1- **The geographical region studied** is the Census Metropolitan Area (CMA) of Montréal. This vast territory, commonly called "Greater Montréal," is inhabited by 3.6 million people and represents half of Quebec's GDP. It includes the cities of Montréal, Laval, Longueuil as well as 79 municipalities.

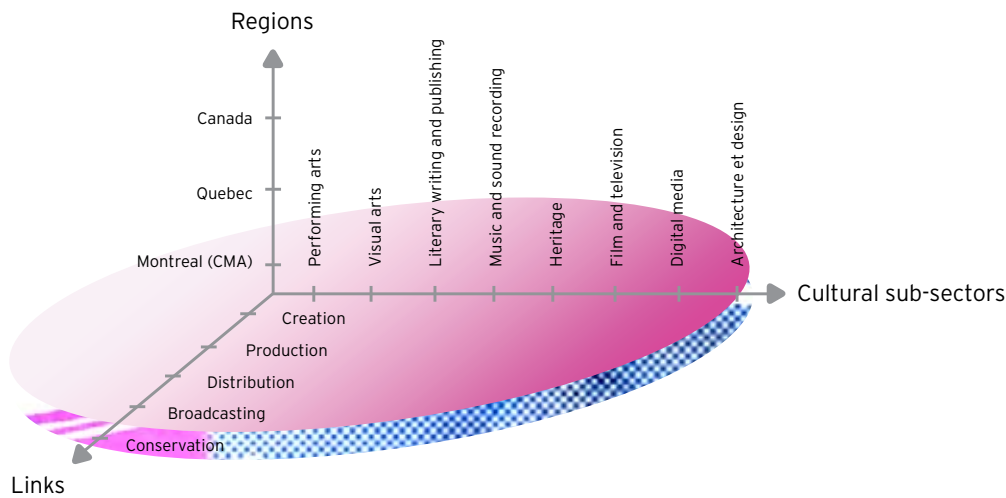
2- **The sub-sectors** included in the cultural sector are the performing arts (dance, theatre, circus arts, etc.), the visual arts, creative literary writing and publishing, music and sound recording, heritage, cinema and television, advertising, architecture and design. The cultural sector, although highly represented by the arts, is not limited to this field alone. Our definition of the cultural sector is therefore closer to what is commonly known as the "creative economy."

3- Within the cultural sector, the **value chain links** analyzed in this study are creation, production, distribution, broadcasting and conservation. The sub-sectors of manufacturing, which include printing, manufacturing, and the production of magnetic and optical media, have been excluded even though they are related to the cultural sector. The reason for this exclusion was to make the study as representative as possible.

This narrow definition was necessary for this study, as its scope was limited to sectors directly related to creative activities. At the same time, it is important to note that this study should not be compared directly with others on the cultural sector, as each study has its own criteria for defining this sector.

Cultural sub-sectors

- Book, newspaper and music stores
- Publishing (except over the Internet)
- Film and video industries
- Sound recording industries
- Radio broadcasting and television broadcasting
- Pay and specialty television
- Publishing, radio broadcasting and television broadcasting over the Internet
- Satellite telecommunications
- Cable television distribution and other activities for distributing television programs
- Other information services
- Specialized design services
- Advertising and related services
- Performing arts companies
- Promoters (broadcasters) of arts and sports events or similar events
- Agents and representatives of artists, athletes and other public personalities
- Artists, authors and independent performers
- Heritage institutions
- Architects and landscape architects
- Interactive games



I. Culture at a glance: A statistical profile

In terms of the economy, culture is a heterogeneous world. The characteristics and conditions of cultural workers vary a great deal from sub-sector to sub-sector.

General observations

Half of all cultural jobs in the metropolitan region of Montréal are concentrated in four sub-sectors: the film and video industry (14%), specialized design services (12%), the advertising sector (12%), and artists, authors and independent performers (12%).

The average income of workers in the Montréal cultural sector is \$44,000 a year, which is 10% below the income average of all industries in Montréal at \$48,547. However, the average salaries within the different sub-sectors vary a great deal.

On the one hand, sub-sectors such as architecture (\$65,000 per year on average), publishing (\$64,000), radio broadcasting and television broadcasting (\$62,500) and interactive games (\$60,000) considerably increase the average salary. On the other hand, the lowest paid sub-sectors are agents and representatives of artists (\$38,800), specialized design services (\$37,600), sound recording (\$36,100) and book, newspaper and music stores (\$30,000).

At the bottom of the list are the 11,200 artists, authors and performers—those we consider as the “creative core” of the Montréal cultural industry—with an average annual income of \$24,400, or half (50.3%) of the average income in Montréal and 55% of the average income in the cultural sector. This average takes into account all sources of income, including any from a job outside of the cultural sector that artists may need to take on. In other words, while artists represent Montréal’s cultural core, they reap the fewest economic rewards for this kind of work.

Methodological note:

The data on job numbers come from the 2008 Labour Force Survey and from the 2006 Census for certain sectors. The data on the average income, education level and job category come from the 2006 Census. The data for the cultural sector as a whole correspond to the weighted average of the sub-sectors.

In terms of schooling, we can see that cultural sector workers have a high level of education. In fact, the cultural sector has a higher percentage of college (26%) and university (42%) graduates than all industries in Greater Montréal (19% and 31% respectively). However, once again, there is not an equal distribution in all sectors: radio broadcasting and television broadcasting, Web publishing, architecture, and the artistic and heritage sectors significantly raise this average, as between 50% and 60% of their workers are university graduates.

In terms of gender, men (53%) and women (47%) are represented more or less equally in this sector. However, the ratio of men to women varies greatly from one field to the next. The same is also true of the average income for both genders. Overall, men who work in the cultural sector earn an income that is appreciably greater than that of women.

In fact, men make up most of the workforce in the five highest paid cultural sub-sectors. This is particularly the case in the fields of interactive games (85%) and architecture (69%), for which the annual incomes are \$60,000 and \$65,000 respectively.

In contrast, four of the six sub-sectors in which women form the majority are below the average income for the cultural sector. These sub-sectors are agents and representatives of artists (62%); heritage institutions (60%); book, newspaper and music stores (56%); and specialized design services (53%). The annual incomes for all of these fields fall below the average income for the cultural sector as a whole.

“While artists represent Montréal’s cultural core, they reap the fewest economic rewards for this kind of work”

More than one quarter of workers in this sector are self-employed. This proportion is particularly high in certain sub-sectors: artists, authors and independent performers (75%), sound recording industries (58%), specialized design services (49%) and agents and representatives of artists (40%). The percentage of self-employed workers in the cultural sector is more than twice that for all industries in Montréal (11%).

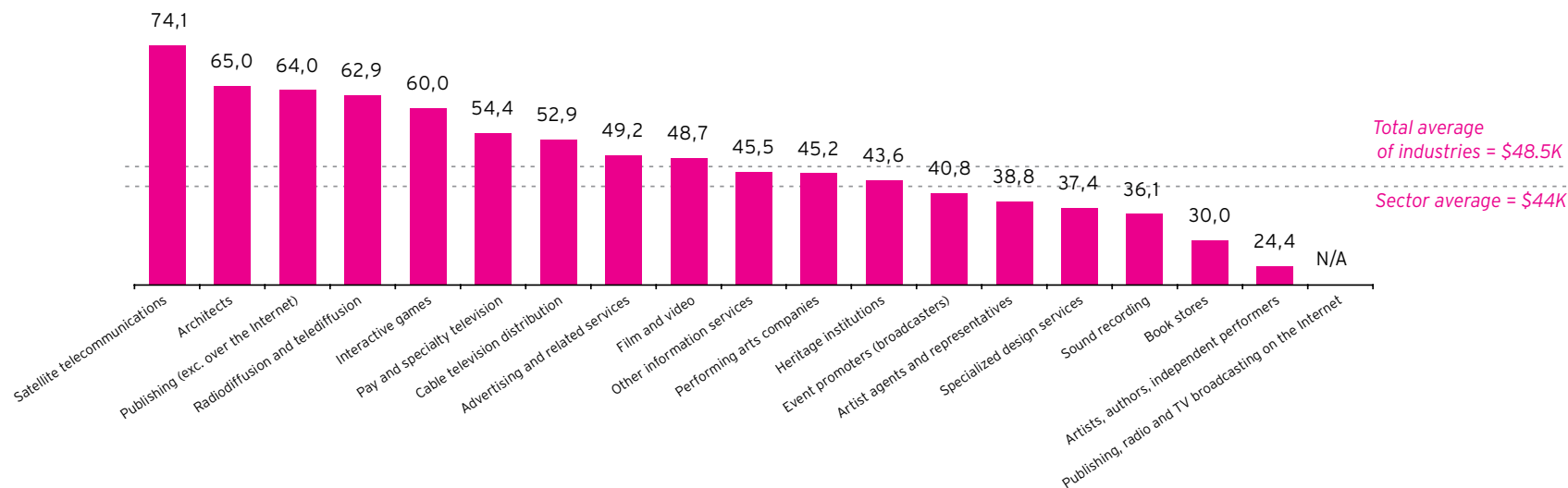
Statistical profile of a diverse sector

Data on the cultural sector

Sub-sectors	Average income in thousands of \$	% college graduates	% university graduates	% men	% women	% self-employed workers	Hours worked	Number of jobs	% sector total	CAGR ¹ 1998-2008
Film and video industries	48.7	26%	41%	56%	44%	21%	38.2	13,400	14%	7%
Advertising and related services	49.2	19%	45%	47%	53%	21%	38.1	11,790	12%	3%
Specialized design services	37.4	33%	41%	47%	53%	49%	37.2	11,400	12%	6%
Artists, authors and independent performers	24.4	20%	50%	58%	42%	75%	32.5	11,200	12%	14%
Radio and television broadcasting	62.9	31%	49%	54%	46%	12%	39.6	7,600	8%	-1%
Publishing (except over the Internet)	64	13%	33%	53%	47%	4%	35.8	6,600	7%	-2%
Performing arts companies	45.2	27%	43%	51%	49%	27%	36.8	6,500	7%	8%
Cable television distribution and other activities for distributing television programs	52.9	30%	34%	66%	34%	4%	39.3	5,600	6%	4%
Heritage institutions	43.6	22%	58%	40%	60%	4%	35.4	4,000	4%	9%
Book, newspaper and music stores	30	27%	33%	44%	56%	7%	32.7	3,800	4%	7%
Video games	60	48%	50%	85%	15%	5%	40	3,600	4%	23%
Architects and landscape architects	65	20%	60%	69%	31%	16%	40.1	2,500	3%	0%
Other information services	45.5	24%	51%	29%	71%	1%	31.9	2,400	2%	5%
Sound recording industries	36.1	36%	32%	75%	25%	58%	41.7	2,100	2%	-2%
Agents and representatives of artists, athletes and other public personalities	38.8	28%	39%	38%	62%	40%	39.4	650	1%	0%
Pay and specialty television	54.4	47%	27%	71%	29%	3%	41.3	400	0.4%	0%
Satellite telecommunications	74.1	21%	51%	63%	37%	5%	39.1	260	0.3%	0%
Publishing, radio broadcasting and television on the Internet	N/A	27%	61%	73%	27%	27%	38.4	210	0.2%	0%
CULTURAL SECTOR AVERAGE/TOTAL	44	26%	42%	53%	47%	28%	35	96,910	100%	4.6%
AVERAGE/TOTAL OF ALL INDUSTRIES	48.5	19%	31%	52%	48%	11%	38.3	1,900,100	100%	1.7%

¹ CAGR: Compound annual growth rate.

Average income of individuals working full-time, all year long
(Montréal CMA, 2008, in thousands of \$)



A fragile creative core

The sub-sectors of artists, authors and performers, who form the core of Montréal's cultural expansion, are generally in a precarious position. These workers have incomes that are well below the average, and three quarters are self-employed. They often take on other jobs, and it is not uncommon for them to slowly abandon creative endeavours for economic rather than artistic motives.

II. The economic importance of culture

Not only is the cultural sector a major source of jobs, it is also experiencing strong growth in Montréal's economy.

Job creation

The cultural sector holds a prominent place in the economic activity of Montréal and Quebec. With 96,910 direct jobs in 2008, the cultural sector is one of Montréal's main industries and today represents 5.1% of overall employment in the metropolis.

In comparison to other "knowledge sectors", culture comes in second after information technology, a sector that employs approximately 130,000 people. By employing one out of 20 workers, the cultural sector wins out over two other major Montréal industries, the aerospace industry and life sciences, which together employ 42,000 and 41,000 people respectively.

"Montréal generates about 70% of Quebec's cultural sector jobs"

In terms of job creation, culture is a prime engine of economic development in Montréal. It is also interesting to note that 69% of jobs in Quebec's cultural sector are found in Montréal. This percentage is well above Montréal's number of jobs out of the entire Quebec labour market, which is 49%.

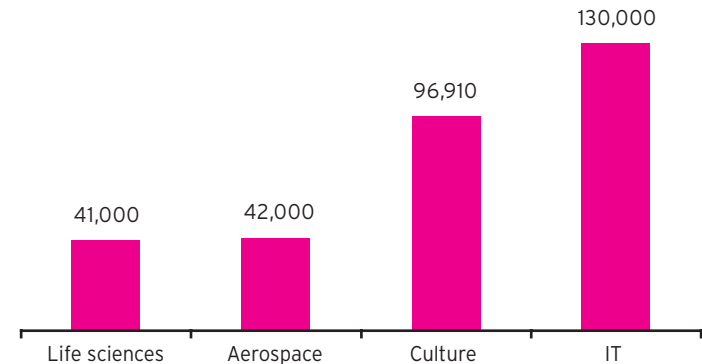
Greater Montréal is therefore the economic engine of the cultural sector, and its influence extends not only to the four corners of Quebec but well beyond the province's borders.

Methodological note:

The data used come from Statistics Canada. The economic impacts were calculated using the intersectoral model of the Institut de la statistique du Québec. The impacts were calculated from the number of full-time jobs included in each sub-sector, therefore based on each sector's output.

The economic output generated by visits to cultural institutions were excluded from the calculation of the economic impacts in order to exclude expenses that could have been made in another sector and that are therefore not directly attributable to the cultural sector.

Total jobs—Economic sectors
(Montréal CMA, 2008, in no. of jobs)



Booming growth

While the number of jobs in Montréal grew by 1.7% on a year-to-year basis between 1998 and 2008, cultural sector jobs in the metropolis increased by 4.6% per year. In terms of jobs, the cultural sector is expanding almost three times faster than all industries combined. It has therefore helped to continuously improve the Montréal labour market during this period.

Of course, growth within the cultural sector itself has been very unequal. It is not surprising that the sub-sector of interactive games has experienced phenomenal expansion, with an annual average growth of 23% over ten years. During the same period, the number of artists, authors and performers also increased (+14% yearly). Next are heritage institutions (+9%), performing arts companies (+8%), film and video (+7%), book, newspaper and music stores (+7%), and the design sector (+6%). The artist-driven “creative core” therefore increased in terms of jobs, just like certain sub-sectors.

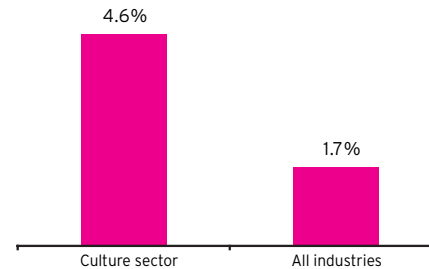
At the same time, a number of sub-sectors experienced zero growth, while three of them even recorded a decline: radio broadcasting and television broadcasting (-2%), sound recording (-2%) and publishing (-1%). These declines are however not uncommon in the context of major transformations—notably technological changes—in certain sub-sectors, starting with television, radio and the disc industry (sound recording).

“The number of jobs in the Montréal cultural sector grew by 57% over ten years”

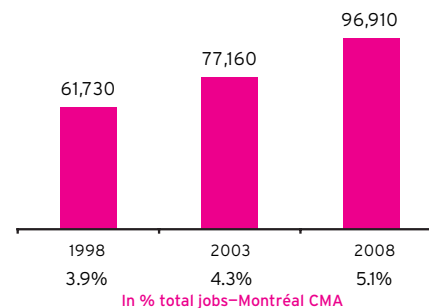
On the whole, culture employed 61,730 people in 1998 (3.9% of total employment), 77,160 people in 2003 (4.3% of total employment) and 96,910 people in 2008 (5.1% of total employment). This is incredible progress and an impressive gain of more than 35,000 jobs in ten years, which represents overall growth of 57% during this period.

These figures attest to the structural transformations of the Montréal and Québec economies over the last decade. While major job losses occurred in traditional sectors such as the manufacturing sector, other jobs were created in other areas of the economy, such as the service industry, cutting-edge technology sectors and, of course, the cultural sector.

Annual job growth rate
(Montréal CMA, 1998-2008, as a %)



Total employment—Cultural sector
(Montréal CMA, 1998-2008, in no. of jobs)



High added value

Beyond its strong capacity for job creation, the cultural sector also generates major economic spin-offs. Culture therefore has a total added value of about \$12 billion per year. Out of this amount, about two thirds (\$7.8 billion) stem from direct expenses in the sector, or about 6% of the GDP of the Montréal CMA. The other \$4.1 billion corresponds to indirect effects from the purchase of goods and services from suppliers. Salaries represent 54% of this total added value, at about \$4.5 billion.

“Culture has an added value of about \$12 billion per year, including \$8 billion in direct economic impacts, or approximately 6% of the GDP of the Montréal CMA.”

Economic impact of the cultural sector
(in thousands \$, 2008)

Catégories	Direct effects	Indirect effects	Direct and indirect effects
Added value	\$7,842,050	\$4,117,199	\$11,959,250
Salaries and remuneration (excluding benefits)	\$4,463,067	\$1,971,065	\$634,132
Net revenue of individual companies	\$271,109	\$1,95,722	\$466,832
Other gross earnings before taxes	\$3,107,873	\$1,950,411	\$5,058,285
Labour force (person-years) ²	96,910	60,798	157,708

It should also be noted that the amount the cultural sector contributes to Montréal's GDP (6%) exceeds the number of jobs it contributes to the labour market (5.1%). Moreover, in addition to its 96,910 direct jobs, the cultural sector represents about 60,798 indirect jobs. This sector therefore has a total of 157,708 direct and indirect jobs.

With such intense economic activity, the cultural sector generates \$1.1 billion for the Government of Quebec and \$700 million for the Government of Canada, for \$1.8 billion per year in government revenue. Out of this amount, \$919.4 million goes towards taxes (taxes on salaries and wages, sales tax, duties and other taxes) and \$843.5 million in incidental taxation (QPP, health services fund, CSST, employment insurance).

Impact on the revenues of the Canadian and Quebec governments
(in thousands of dollars, 2008)

Categories	Direct effects	Indirect effects ³	Direct and indirect effects
Taxation	\$654,185	\$274,249	\$919,435
Incidental taxation	\$503,472	\$339,981	\$843,452
Annual total	\$1,148,657	\$614,230	\$1,762,887

² This data is expressed in “person-years,” meaning based on the equivalent of a full year of work.

³ The indirect effects are calculated for all of Quebec, since the spin-offs from the Montréal cultural sector often exceed the city's borders.

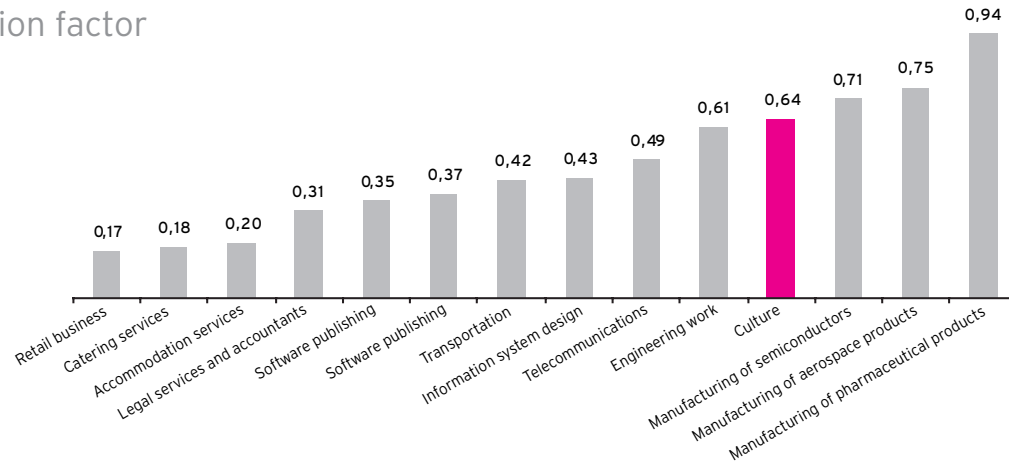
This sector has major economic spin-offs in terms of jobs, taxation and economic activity.

In fact, when the employment multiplier factor is taken into account, the economic spin-offs of the cultural sector are well above those of many other comparable sectors, such as the entire service industry.

“The indirect spin-offs of culture make it an economic sector with high added value”

In fact, the cultural sector has an employment multiplication factor of 0.64. This means that for each 100 direct jobs created in this sector, another 64 indirect jobs are generated. This high rate of indirect spin-offs makes it a sector with high added value. In fact, only the manufacturing and cutting-edge technology sectors have a greater economic impact than the cultural sector.

Employment multiplication factor



An exceptional economic asset

These data attest to the economic vitality of the cultural sector and its valuable role in terms of wealth creation. It is a growing, dynamic sector that contributes to the prosperity of Montréal. However, we must not become complacent. Montréal’s artist-driven “creative core” is quite fragile. The precarious situation of artists—and the artistic organizations that employ them—affects the potential for Montréal’s cultural sector to extend beyond its borders. As a result, the business world’s contribution to and investment in culture can make a tremendous difference. In most cases, artists need private sector support in order to succeed.

III. Private funding of the arts sector

Private funding for culture is substantial but unevenly distributed. Arts organizations receive donations and sponsorships to highly varying degrees depending on their size and sector. At the same time, corporate involvement is extremely variable.

Funding for arts organizations

Overall, Montréal arts organizations receive 45% of their funding from the public sector and 34% from independent revenue. Private funding accounts for one fifth (21%) of the revenue from private sources in the form of donations (14%) or sponsorships (7%). Therefore, \$53.6 million of the total \$256.2 million budget of the arts organizations supported by the Conseil des arts de Montréal (CAM) come directly from the business community.

Note that among these organizations, two thirds (66%) receive donations and 46.9% have private funding agreements. This means that certain organizations do not receive any private funding and depend entirely on independent revenue and public funding.

"21% of the revenue of arts organizations comes from private sources compared to 34% in independent revenue and 45% in public funding"

Furthermore, it is important to note that private funding is allocated very unequally among cultural organizations. Data from the CAM reveal that there are two major factors for this disparity: the size of the cultural organization and the specific arts sector.

First of all, it is clear that the budget of a cultural organization directly influences its ability to attract private funding. Larger organizations have a greater ability to obtain revenue from the private sector in donations and sponsorships. While smaller organizations (with annual budgets of less than \$500,000) only receive between 8% and 12% in private funds, organizations with annual budgets of more than \$500,000 receive between 15% and 27% in private funding.

Methodological note:

The data provided by the Conseil des arts de Montréal (CAM) are based on a study of the revenues of the 294 arts organizations that submitted a grant application in 2009. These data correspond to the real revenues of the last audited financial year, or 2007-2008 in most cases and 2006-2007 if data from 2007-2008 were not available.

All the organizations described in this section are non-profit and incorporated as such. Their main mandate is the creation, production or broadcasting of professional works of art. The major festivals as well as organizations from the publishing, popular music and comedy sectors are not part of the collected data.

For analysis purposes, amounts from the donation of art works were not considered, as they considerably distorted the percentages attributed to donations in the category of visual arts, media arts and film.

These gaps are extremely large, especially when considered in absolute terms: 15% of the most well-off organizations share 84% of private funding, or \$45 million out of a total \$53.6 million.

This reality can be explained by different factors. The greater the arts organization's budget, the greater it's ability to dedicate financial and human resources to finding donations and sponsorships. There is also the reputation aspect; organizations with more resources are better known by the general public—and business people. Again, this increases their chances of receiving private donations.

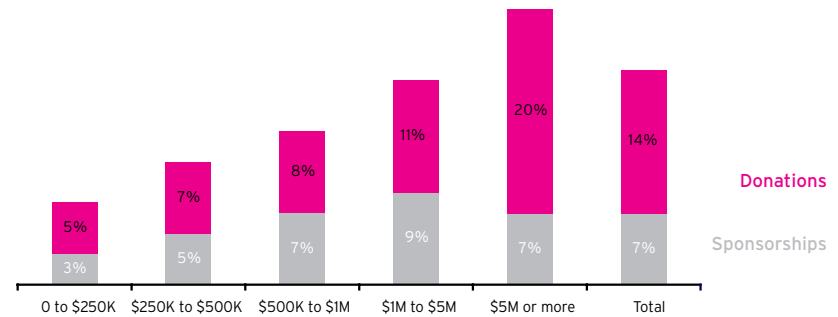
Secondly, the percentage of funding that an organization receives fluctuates tremendously depending on its artistic field. Literature (3%), dance (10%) and theatre (13%) suffer in particular from weak private sector support in terms of funding. On the other hand, the fields of music (24%), visual and media arts and film (25%), as well as festivals (38%) fare better in this regard.

“Larger organizations, festivals and organizations in visual arts and music receive more private funding”

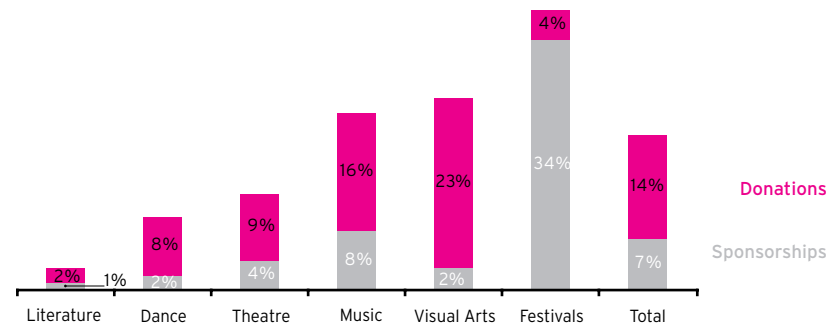
These data leave a lot of room for interpretation. Of course, the nature of an organization will shape its ability to attract donations and sponsorships. In this way, the numbers speak volumes: the sectors of music (8%) and festivals (34%) are more likely to attract sponsorships. As for donations, the most “spoiled” sectors are once again music (16%) as well as the visual arts (23%).⁴

Furthermore, organizations with the largest budgets are concentrated in the most “lucrative” artistic fields, meaning those that provide the most visibility and awareness in terms of sponsorships and donations.

Percentage of private funding according to budget (Organizations supported by the CAM-2008)



Percentage of private funding according to sector (Organizations supported by the CAM-2008)



⁴ In the case of the visual arts, this gap is attributable notably to donations of art works made to museums and art galleries, which are considered as a type of funding.

Financing of cultural organizations

Annual budget (in thousands of \$)	Type of funding	Visual arts	Music	Theatre	Literature	Dance	Festivals	Total
0-250	Independent funding	16%	41%	28%	29%	38%	18%	144
	Donations and sponsorships	7%	12%	7%	2%	9%	25%	
	Public funding	78%	48%	65%	69%	54%	57%	
250-500	Independent funding	26%	27%	23%	23%	34%	26%	65
	Donations and sponsorships	6%	28%	9%	3%	3%	32%	
	Public funding	67%	45%	68%	73%	62%	43%	
500-1000	Independent funding	54%	21%	31%	43%	31%	14%	41
	Donations and sponsorships	16%	27%	6%	12%	6%	37%	
	Public funding	30%	52%	64%	45%	63%	50%	
1000-5000	Independent funding	32%	37%	51%	33%	42%	29%	36
	Donations and sponsorships	18%	29%	19%	2%	7%	34%	
	Public funding	51%	34%	30%	66%	50%	37%	
5000+	Independent funding	26%	35%	47%	0%	41%	11%	8
	Donations and sponsorships	31%	24%	7%	0%	21%	60%	
	Public funding	43%	41%	46%	0%	38%	29%	
	Independent funding	28%	34%	43%	31%	38%	23%	294
	Donations and sponsorships	25%	24%	13%	3%	10%	38%	
	Public funding	47%	42%	44%	67%	51%	39%	
Total	Number of organizations	54	61	71	32	45	31	

The artistic disciplines compiled in this section of the study are the following:⁵

- Visual arts (media arts, museums and film)
- Dance
- Literature (This category is mostly made up of arts magazines.)

- Music (except songs and popular music)
- Theatre and new artistic practices (including multidisciplinary and transdisciplinary arts)
- Festivals (This category is made up of all festivals supported by the CAM all disciplines combined. The Jazz Festival, the Just for Laughs Festival and the World Film Festival are not part of this category.)

⁵ Note that all arts organizations are non-profit.

Survey: Contribution from the business community

There is little data on funding for cultural and arts organizations provided by Montréal region businesses. The Board of Trade of Metropolitan Montreal therefore surveyed businesses in the Greater Montréal area to measure the support they provide to Montréal's cultural sector.

Out of the 341 companies surveyed, 247 (72.4%) contributed to non-profit organizations⁶ through charitable donations, sponsorships, the purchase or exchange of goods and services, or the loan of employees.

For 46.56% of these companies, the total budget for their financial contributions remained more or less the same in 2008 compared with the previous year. It increased in 26.8% of cases and decreased in 15.6% of cases.

A third of the 247 donor companies (34%) have a department or an employee responsible for donations or sponsorships.

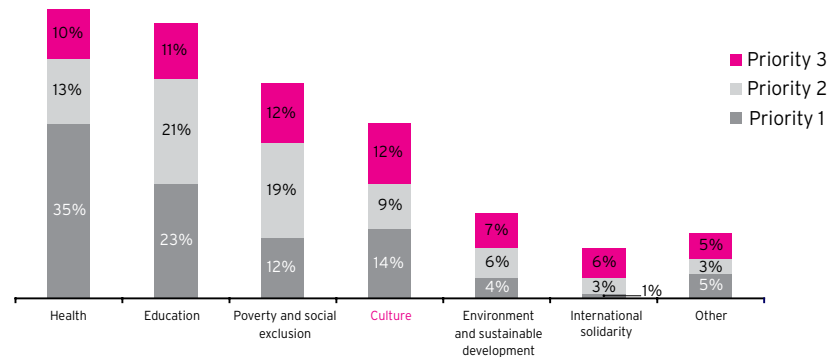
When business people were asked to name the three main non-profit activity sectors supported by their companies, they named health (58%), poverty and social exclusion (54%), as well as education (43%) as priorities. At 35%, culture came in fourth. More precisely, culture is a priority for 14% of donor companies. It is the second choice for 9% and the third choice for 12%.

Among the 247 companies, 87 (35.2%) contributed to a cultural organization. One quarter of the companies surveyed (87 out of 341 or 25.5%) therefore contribute to the cultural sector.

Methodological note:

The survey population was made up of companies registered in the database of the Board of Trade of Metropolitan Montreal, which includes both member and non-member companies. The survey took place on September 3, 2009 (member companies) and September 15, 2009 (non-member companies). A total of 12,633 people received an e-mail inviting them to respond to the on-line survey. Between September 3 and 24, 2009, 341 companies filled out the survey for a response rate of 2.7%. The survey results have a maximum margin of error of 5.2%, 19 times out of 20. The survey results cannot necessarily be extrapolated to all companies in the metropolitan region, as the sample was drawn from a database comprised mostly of businesses that are members of the Board of Trade of Metropolitan Montreal and the sample itself contained a high number of large companies. More precisely, among the surveyed companies that indicated their size, 64% have fewer than 50 employees, 21% have between 50 and 250 employees, and 15% have more than 250 employees. However, we can confirm that the results are representative of the study population itself.

Priorities of surveyed companies in financial contributions



⁶ Charitable, humanitarian, sports, and cultural organizations, etc.

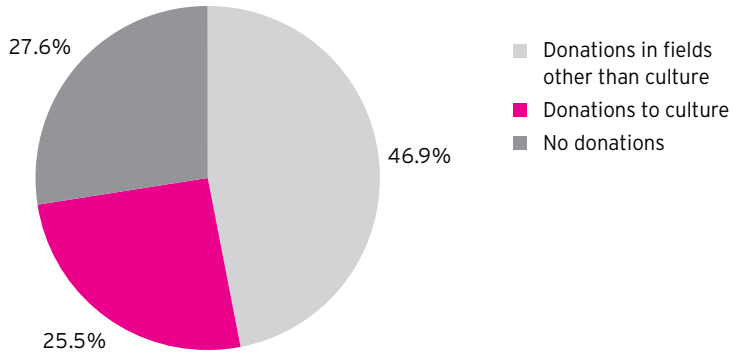
The total budget for financial contributions to cultural organizations remained more or less the same compared with the previous year for 60.1% (53) of these companies. It increased in 20.6% of cases and decreased in 19.5% of cases.

Two thirds (66.6%) contributed to between 1 and 4 organizations, while 20.7% supported between 5 and 9. Also, 19.5% of companies that contribute to culture have a social commitment policy that includes this sector.

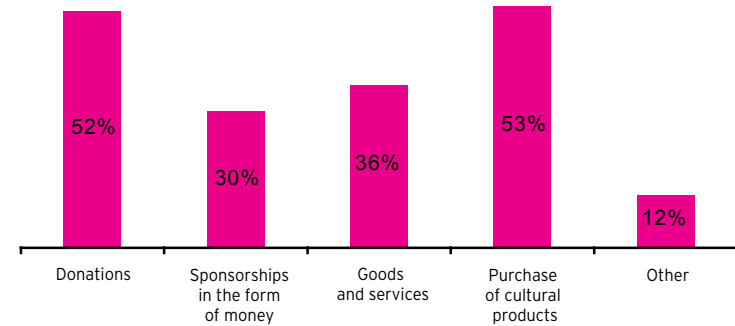
"A quarter of the companies surveyed contribute financially to the cultural sector. A fifth gets involved through non-financial means."

The purchase of cultural products for corporate purposes or for employees is the main way that companies support the cultural sector: 52.8% of companies (46 of 87) contribute in this way. Next come donations (52.1%), sponsorships in the form of goods and services (35.6%) and sponsorships in the form of money (29.9%).

Financial implications of surveyed companies

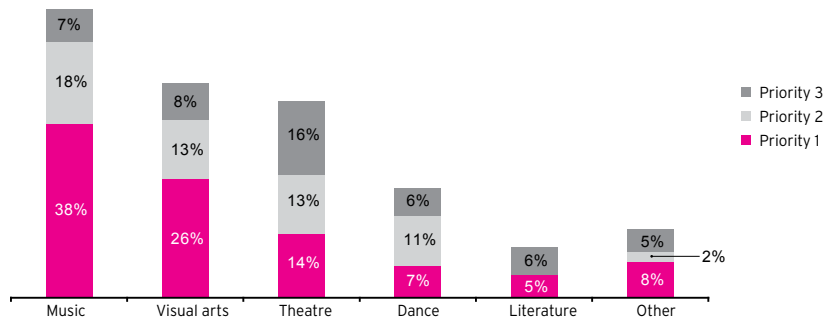


Ways that surveyed companies support the cultural sector



When those surveyed were asked to name the three cultural categories that their companies support, the most popular answers were music (63%), the visual arts (47%) and theatre (43%). These data are in keeping with the statistics provided for the Conseil des arts de Montréal (CAM): the fields of music and the visual arts receive the most support from companies with a mission to support the cultural sector.

Priorities of surveyed companies in financial contributions to artistic organizations



The main reasons that prevent companies from funding cultural organizations are a lack of money and resources (35.2%), financial commitments in other sectors (35.2%), and few ties with the cultural milieu (22.7%).

Also, a fifth of the companies surveyed (78 out of 341 or 19.7%) support the cultural sector through non-financial means. The most popular forms of non-financial assistance are non-remunerated services (50%), employee participation on boards of directors (43.6%) and participation in fundraising activities (34.6%).

Surveyed companies' non-financial support of culture



Considerable involvement with room for improvement

When it comes to culture, the private sector is already a major player. One quarter of the business people surveyed by the Board of Trade fund organizations and one fifth get involved somehow in this sector. Moreover, private funding contributes to 21% of the budgets of the cultural organizations in Montréal that are supported by the Conseil des arts de Montréal. However, commitments to the arts sector are often limited in scope. Funding is haphazard and unequal. The smallest organizations—and those from specific artistic fields—have more trouble finding sponsors. Our survey also reveals that a lack of awareness of the cultural milieu prevents many business people from contributing to this sector. This highlights major issues: How do we improve collaboration between businesses and cultural organizations? And do we make sure that the “creative core” is sufficiently and equitably supported by the private sector?

Testimonials from patrons of the arts

Artists: a source of inspiration for entrepreneurs

Peter McAuslan, President, McAuslan Brewing
Prix Personnalité Arts-Affaires 2008



“Artists inspire me! We can learn a lot from their courage and their determination. As entrepreneurs, they follow their instincts and take risks. For me, these people are true to themselves.” Peter McAuslan’s friendship with artists is not new: twenty years ago, musicians, painters and other avant-garde intellectuals were the first to adopt McAuslan products. “Riopelle drank Saint-Ambroise! I find that extraordinary; I love this fact!” said the President, laughing.

Peter McAuslan admits that he is indebted towards artists, who have acted as a veritable sales force for the brewery. In return, he now supports many cultural organizations and events in Montréal and Quebec, particularly in the music sector. McAuslan does not hesitate to partner with “riskier” projects, such as the Saint-Ambroise Fringe Festival—an attitude that is not very common among business people here. “This philosophy is consistent with the fact that we brew beers that are a bit special and a bit marginal,” he explained. McAuslan Brewing also opened a cultural centre next to its offices, where nearly 200 activities are presented every year.

Supporting arts and culture is also “a very direct way of reaching the public” and has major spin-offs for the business. “I am amazed that more companies do not support the arts. It is very surprising,” said Mr. McAuslan. His surprise is well-founded, as he seems to take true pleasure in interacting with artists, or those whom he considers to have “generous souls.” To hear him talk, he gets more out of his relationships with artists than they do out of their relationships with him...

Culture represents personal and collective wealth

Diane Giard, Senior Vice-President, Quebec and Ontario
Scotiabank

Member of the Steering Committee for Montréal, métropole culturelle



“Culture is a type of wealth: it opens new perspectives and contributes to personal and collective enrichment.”

Like other big organizations, Scotiabank is committed to giving back to the communities it serves. The company invests in many sectors according to the interests of local citizens. Hockey, our national pastime, is of course an inevitable choice. But arts and culture can also trigger different kinds of passions, as this sector is too often seen as marginal or elitist. Diane Giard deplores the gap between two extreme, and wrong-headed, positions. On the one side are economic stakeholders who have trouble seeing culture as an engine of development; on the other side are media and other players from the arts sector who are averse to having a theatre bear the name of its main sponsor.

“It is still hard to get people to understand that this marriage makes culture more accessible,” she pointed out. “Getting involved in culture is much more than simply handing over a cheque in exchange for a logo. The impact of culture is not only economic but also social. Developing culture and its accessibility helps keep society healthy.” Companies that provide financial support to the arts also get something back, and this return on investment is measurable. “It is a win-win situation,” she added.

Getting involved: a social must

Maurice Forget, Partner, Fasken Martineau
Special Award of Excellence, Prix Arts-Affaires 2007



“Young lawyers today have a much greater social conscience than the one instilled in my generation. A law firm that operates without a pro bono program does so at its own risk.”

Fasken Martineau is a leader and innovator in contributions to the cultural sector. The company has been committed to the cultural sector, particularly the visual arts, for thirty years. Its founder, Jean Martineau, chaired the Canada Council for the Arts. Many partners and employees at Fasken Martineau contribute to this mission. For the Prix Arts-Affaires 2007, Maurice Forget counted 47 associates who participated in administrating cultural organizations. Acting as patrons of the arts goes beyond simply giving a cash donation or sponsoring an event; it is based on true support in the form of time and expertise.

The contemporary art collection of Fasken Martineau is also widely recognized; the company allows both its employees and the community to benefit from these works through its loan program.

Maurice Forget argues on behalf of Montréal’s cultural specificity, the development of which depends on our ability to acknowledge and promote this cultural wealth, from our natural heritage to the talents of our architects. His message to other companies in the metropolis: “Get involved in culture; it’s easy and costs very little!”

Giving what you can

Jan-Nicolas Vanderveken, Partner, TP1 Internet 360
Prix Arts-Affaires 2007, SME



Giving to cultural organizations is not common among Quebec SMEs. Even less so when it comes to very young businesses, such as TP1 Internet 360, founded in 2005.

“You don’t have to be a multinational company like Bombardier or L’Oréal!” said Jan-Nicolas Vanderveken. “You simply need to give what you can; the impact is even greater when you do, because you stand out. And the impact is also huge for those we help.”

TP1 Internet 360 partnered with Le Pont Bridge, a multidisciplinary theatre troop with a playful approach. The company designed and continues to manage the troupe’s Web site. In return, the troupe provides it with visibility, particularly by including its logo in all of its communications.

The young company also contributed to the creation of the Montréal Arts and Business portal of the Board of Trade of Metropolitan Montreal, which promotes the creation of a business network.

Working on culture-themed projects is also a source of motivation for employees. Jan-Nicolas Vanderveken has been able to communicate his passion and natural affinity for the arts. He was introduced to the theatre and the opera when he was a child. “This sector benefits a great deal from patronage,” he believes. “We therefore contribute not only for the cause itself but also because this increases the stature of TP1 Internet 360.”

Investing in culture: a strategic advantage

Javier San Juan, President and CEO, L'Oréal Canada
Member of the Steering Committee for Montréal, métropole culturelle



"At L'Oréal Canada, we look for different ways of being a good corporate citizen and contributing to our society. There are many ways to be an active citizen, such as contributing to the development of culture."

This multinational company is a supporter of the arts across the globe: it supports many local initiatives that reflect their values, such as promoting the status of women, particularly in the sciences; human solidarity and dignity; as well as education and research.

L'Oréal Canada's head office is in Montréal, a city that indeed stands out through its profound cultural wealth. Supporting Montréal's cultural character means giving the city a competitive advantage over other world cities—which has strategic benefits for companies that set up shop here.

"There is clearly a will to help the City of Montréal so that it can become even more interesting and attractive for skilled professionals. These are resources for us too."

Giving back to the community

Elliot Lifson, Vice Chairman, Board of Directors, Peerless Clothing
On behalf of Alvin Segal, President and CEO of Peerless Clothing,
patron of the arts and founder of the Segal Centre
Prix Personnalité Arts-Affaires 2006



"There are three ways to give to the community. You can give and then measure advantages and assess your 'return.' You can also give because you are a 'good citizen.' But for me, the best reason for giving is because it's important. This is Mr. Segal's philosophy."

Like other business magnates, Alvin Segal comes from a modest background and had to take big risks to build his business and, finally, to succeed. The businessman never forgot his Montréal origins. "His roots are here; it's a way for him to give back to his community, to Montréal," explained the Vice Chairman.

Elliot Lifson describes the founder as a passionate man who is profoundly committed to Montréal artists and its community; he invests a lot of his personal time to these projects.

One year after the Montréal, métropole culturelle Rendez-vous in November 2007, Alvin Segal, together with his partners in this historical event, cut the ribbon on the brand new Segal Centre for Performing Arts, a meeting place for Montréal artists from all backgrounds.

"For us, diversity is not a question of strategy," Elliot Lifson made clear. "It is literally a part of who we are and a vital thread of our social fabric. Since diversity and creativity are such a valuable source of collective wealth, it is natural that we support the development of these qualities to the best of our ability."

Opening the door to a universal language

Phoebe Greenberg, Director and Founder,
DHC/ART Foundation for Contemporary Art



"The arts are an essential part of our humanity; it is a universal language. Education in the arts improves our society."

Artist, business woman and patron of the arts, Phoebe Greenberg carries a deep passion for contemporary art, a passion that she intends to share and make accessible.

Inaugurated in fall 2007, the DHC/ART Foundation is a contemporary art gallery that also serves as an educational and awareness program. It is not a place where art works are bought and sold as a part of business transactions. The exhibits and the program are free of charge.

"I wanted to create something intimate that was smaller than a museum but bigger than a gallery in order to enhance relationships with the art works and make them accessible. I had to find a balance. This is a gift I wanted to give because it is a passion of mine."

DHC/ART exhibits works from the global arts scene. While living abroad for many years, Phoebe Greenberg heard many artists express an interest in coming to Montréal, "a city with a lot of creativity, energy and a European flair."

IV. Conclusion

The cultural sector is experiencing growth. It is a pillar of Montréal's economy and holds a prominent place in Quebec's economy as well. Montréal has a pool of creators who drive this sector and help forge its identity and promote its international influence.

However, its creative core is fragile. It must continue to receive public support and be able to rely more on private sources. Certain fields receive little private sector support and are therefore all the more vulnerable.

Fortunately, Montréal's cultural sector has solid foundations. There are many models for success, the private sector acknowledges its role, strong ties exist between business and arts, and the initiatives are there. The challenge is to reinforce these ties and create more. To do this, we must first recognize the quality and importance of the many contributions made by the creative core of the cultural sector. This study stresses the economic contributions of culture and also shows that the people who support it understand its importance and gain true satisfaction from their involvement.

Businesses have a key role to play not only through donations and sponsorships, which are essential to the development of cultural organizations, but also through active participation in this sector. Indeed, this study clearly shows a direct relationship between the involvement of managers from the business sector and the performance of an arts organization. For cultural organizations, this involvement often translates into a better ability to raise money and manage their activities to ensure both longevity and growth.

Appendix

Sectors included in the definition of the cultural sector

CULTURAL SUB-SECTORS - NIACS CODE	DEFINITION
4512 - Book, periodical and music stores	Includes institutions whose core business consists in selling retail books, newspapers, magazines and new audio and video recordings.
5111 - Publishing (except over the Internet)	Includes institutions whose core business consists in publishing (or publishing and printing) newspapers, periodicals, books, geographical maps, directories, databases and other products such as calendars, catalogues and greeting cards.
5121 - Film and video industries	Includes institutions whose core business is the production and/or distribution of films, videos, television programs or advertising as well as the screening of films or the supply of postproduction services and related services.
5122 - Sound recording industries	Includes institutions whose core business is the production and distribution of music recordings, music publishing, or the supply of sound recording services or related services.
5151 - Radio broadcasting and television broadcasting	Includes institutions whose core business is the operation of broadcasting studios and facilities used to transmit various radio and television programs, including entertainment programs, informational programs, talk shows and other programs. These institutions produce, buy and make programs and generate revenue through the sale of on-air time for advertising, through donations and subsidies, or through the sale of programs.
5152 - Pay and specialized television	Includes institutions whose core business consists in broadcasting television programs of a defined format and that are only broadcast on cable television or satellite systems. Programs are sent to subscribers through cable television or satellite system providers.

5161 - Publishing, radio broadcasting and television broadcasting over the Internet	This industry consists of institutions whose main activity consists of publishing and/or broadcasting content exclusively over the Internet. These institutions do not provide traditional (non-Internet) versions of the content they publish or broadcast. Institutions in this industry provide general or special interest textual, audio and/or video content over the Internet.
5174 - Satellite telecommunications	Includes institutions whose core business consists in providing mobile and fixed telecommunications services via satellite networks that they operate or in distributing the services of other satellite network companies. Institutions in this class normally serves businesses (telecommunications suppliers, corporate networks, radio broadcasters), but they may also occasionally provide services to individuals who do not have access to land networks (e.g., high-speed Internet).
5175 - Cable television and other activities for distributing television programs	This industry consists of third parties involved in distribution systems for radio programming. The institutions in this industry deliver sound, visual, or textual programming received from cable networks, local television, or radio networks directly to the homes of consumers via cable or satellite systems for a subscription fee or set cost. In general, programming material does not come from these institutions.
5191- Other information services	Includes institutions that do not appear in any other class and whose core business consists in providing information and other services. The main organizations in this group are press agencies, libraries and archives, Internet publishing and broadcasting portals as well as Web search engines, along with other information research services provided on a contractual basis.
5414 - Specialized design services	Includes institutions whose core business consists in providing specialized design services, except architectural and technical design services or information system design services.

5418 - Advertising and related services	Includes institutions whose core business consists in: creating advertising or public relations campaigns in the media; placing ads in the media on behalf of advertisers or advertising agencies; selling media time or space to advertisers or advertising agencies on behalf of the owners of these media outlets; creating and implementing advertising campaigns through indoor or outdoor posters; creating and implementing direct mail campaigns; delivering advertising material or samples (except through the mail); creating and implementing advertising campaigns through giveaways; providing related to services such as logo painting and lettering, reception services and window dressings.
7111 - Performing arts companies	Includes institutions whose core business consists in producing live shows involving actors, singers, dancers, music groups and musicians, or other performance artists. Among the institutions of this group are theatre companies, dance companies, music groups and musicians, circus troupes and organizers of ice shows.
7113 - Promoters (distributors) of arts and sports events or similar events	Includes institutions whose core business consists in organizing and promoting artistic productions, sporting events and similar events, such as festivals. The institutions in this group may operate arenas, stadiums, theatres or comparable facilities, or they may present live shows in facilities of this type that are operated by others.
7114 - Agents and representatives of artists, athletes and other public personalities	Includes institutions whose core business consists in representing creative or performance artists, sports personalities and celebrities, or in managing their affairs. These institutions represent their clients in contract negotiations, manage or organize their clients' finances, and generally try to promote their clients' careers.
7115 - Artists, authors and independent performers	Includes (independent) individuals whose core business consists in playing in live shows, creating literature or artistic or cultural works, or providing the necessary technical support for such productions. Among these independent celebrities are athletes who promote events, give talks or provide similar services.

7121 - Heritage institutions	Includes institutions whose core business consists in preserving and exhibiting objects, locations and natural points of historical, cultural or educational interest.
Architects and landscape architects (NOC 2151 and 2152, according to Emploi-Québec)	Architects design, plan and develop specifications to build and renovate industrial, commercial, institutional and residential buildings. Architects work in architectural firms, private corporations or governments or are self-employed.
Interactive games (Data from the 2008 SECOR study)	Includes workers involved in developing and publishing interactive games.

Results of the on-line survey on private funding for the cultural sector

During your last complete financial year, did your business contribute to the funding of non-profit organizations (charitable, humanitarian, sports, or cultural organizations, etc.) through charitable donations, sponsorships, the purchase or exchange of goods and or the loan of employees?

Answer options	Percentage for each answer	Number of answers
Yes	72.4%	247
No (go to question 14)	25.2%	86
Do not know / did not respond	2.3%	8
<i>Number of respondents</i>		341

Compared with last year, the total budget for these financial contributions:

Answer options	Percentage for each answer	Number of answers
Increased	25.9%	64
Decreased	18.2%	45
Stayed more or less the same	46.6%	115
Do not know / did not respond	9.3%	23
<i>Number of respondents</i>		247

Which activity sector(s) does your business support? Identify the three main sectors starting with the largest (in amount of donations). Enter "1" for the largest, "2" for the second largest, and "3" for the third largest. Only enter the three main sectors even if you support organizations in other sectors.

Answer options	1	2	3	Number of answers
Health	87	32	25	144
Education	30	46	30	106
Poverty and social exclusion	57	51	26	134
Environment and sustainable development	11	14	18	43
Culture	34	23	30	87
International solidarity	2	8	15	25
Other	12	7	12	31
<i>Number of respondents</i>				247

During your last complete financial year, did your business contribute (through donations, sponsorships, the purchase or exchange of goods and services, the loan of employees, etc.) to the funding of the cultural sector (including cultural companies, cultural organizations, cultural events, artists, artisans, etc.)?

Answer options	Percentage for each answer	Number of answers
Yes	35.2%	87
No (go to question 14)	57.5%	142
Do not know / did not respond	7.3%	18
<i>Number of respondents</i>		247

How does your business financially support the cultural sector? You may check more than one answer.

Answer options	Percentage for each answer	Number of answers
Donations	51.7%	45
Sponsorships in the form of money	29.9%	26
Sponsorships in the form of goods and services	35.6%	31
Purchase of cultural products	52.9%	46
Other (specify)	11.5%	10
<i>Number of respondents</i>		87

How does your business financially support the cultural sector? You may check more than one answer.

Answer options	Percentage for each answer	Number of answers
Increased	20.7%	18
Decreased	19.5%	17
Stayed more or less the same	58.6%	51
Do not know / did not respond	52.9%	1
<i>Number of respondents</i>		87

Last year, how many cultural organizations received a contribution from your company?

Answer options	Percentage for each answer	Number of answers
1-4	66.7%	58
5-9	20.7%	18
10-14	3.4%	3
15-19	0.0%	0
20 and more	5.7%	5
Do not know / did not respond	3.4%	3
<i>Number of respondents</i>		87

Does your business have a community and social commitment policy?

Answer options	Percentage for each answer	Number of answers
Yes	30.0%	30
No (go to question 13)	58.0%	58
Do not know / did not respond	12.0%	12
<i>Number of respondents</i>		100

If you answered "Yes" to the previous question, does this policy include the cultural sector?

Answer options	Percentage for each answer	Number of answers
Yes	43.6%	17
No	25.6%	10
Do not know / did not respond	30.8%	12
<i>Number of respondents</i>		39

Which category or categories of cultural organizations does your company support? Identify the three main categories starting with the largest (in amount of donations). Enter "1" for the largest, "2" for the second largest, and "3" for the third largest. Only enter the three main categories even if you support organizations in other categories.

Answer options	1	2	3	Number of answers
Media arts, visual arts and cinema	23	11	7	41
Dance	6	10	5	21
Literature	4	0	5	9
Music	33	16	6	55
Theatre and new practices	12	11	14	37
Other	7	2	4	13
<i>Number of respondents</i>				87

Does your business support the cultural sector through non-financial means?

Answer options	Percentage for each answer	Number of answers
Yes	22.9%	78
No (go to question 16)	46.3%	158
Do not know / did not respond	30.8%	105
<i>Number of respondents</i>		341

If you answered "Yes" to the previous question, which types of assistance does your company provide the cultural sector? You may check more than one answer.

Answer options	Percentage for each answer	Number of answers
Employee participation on boards of directors	43.6%	34
Loans of employees	6.4%	5
Boards or non-remunerated services	50.0%	39
Participation in fund-raising activities	34.6%	27
<i>Number of respondents</i>		78

What are the main reasons that prevent your business from contributing to the funding of cultural organizations? You may check more than one answer.

Answer options	Percentage for each answer	Number of answers
Lack of money or resources	25.5%	87
Few ties with the cultural milieu or limited knowledge of the cultural milieu	16.4%	56
Financial commitments to other sectors	25.5%	87
Other (specify)	7.6%	26
Do not know / did not respond	38.4%	131
<i>Number of respondents</i>		341

Activity sector

Answer options	Percentage for each answer	Number of answers
Professional services	26.1%	89
Financial services	6.5%	22
Telecommunications, media, entertainment	5.0%	17
Manufacturing	7.9%	27
Public	2.3%	8
Parapublic	2.3%	8
Other (specify)	15.8%	54
Do not know / did not respond	34.0%	116
<i>Number of respondents</i>		341

Number of employees

Answer options	Percentage for each answer	Number of answers
1-49	40.2%	137
50-249	13.5%	46
250 and more	9.4%	32
Do not know / did not respond	37.0%	126
<i>Number of respondents</i>		341

Position within the company

Answer options	Percentage for each answer	Number of answers
President	29.6%	101
Vice-president	9.4%	32
Vice-president, Marketing	0.9%	3
Vice-president, Communications	0.3%	1
Vice-president, Public relations/affairs	0.0%	0
Director	7.9%	27
Director, Marketing	1.5%	5
Director, Communications	0.9%	3
Director, Public relations/affairs	0.9%	3
Advisor	2.6%	9
Other (specify)	7.9%	27
Do not know / did not respond	38.1%	130
<i>Number of respondents</i>		341

Notes

Cover: Supreme Silk 111 lbs
Inside: Supreme Silk 200 M





Chambre de commerce
du Montréal métropolitain
Board of Trade of Metropolitan Montreal