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Culture participation: Does language make a difference?

By Pina La Novara

What factors influence Canadians' participation in culture activities? Studies have shown that some socio-economic factors such as income, level of education and age play a key role[1]. But there are also many other factors to consider. This article will take a preliminary look at one factor that has not been analysed extensively – language. Does the language one speaks most often at home have any influence on the pattern of participation in culture activities? This article will explore the possible links between the two. The reader should, however, keep in mind that historical and cultural history are closely associated with language and play important mitigating roles in the patterns described in this article.

Canadians who speak English at home are more likely to be avid readers, to visit heritage institutions, historic sites, conservation areas and nature parks or to use the Internet. On the other hand, Canadians whose home language is French are more likely to attend symphonic and classical music performances, festivals or to watch television. Finally, there are some culture activities that attract French and English-speakers alike, such as going to the movies, listening to music recordings, or playing a musical instrument.

This article focuses exclusively on Canadians who reported their home language to be either English or French, regardless of province of residence. Throughout this article different proxies are used to describe the patterns in culture participation by language[2]. For instance, on several occasions the province of Quebec is used as a proxy for French-

[1] *Earl, Louise, 1998. "Spending on Selected Recreation Items in Canada."* Focus on Culture, *Vol.10 No.2; Earl, Louise, 1998. "Entertainment Services: a Growing Consumer Market."* Services Indicators. *Statistics Canada, Catalogue No. 63-016-XPB.*

[2] *Mother tongue or home language are both terms that see wide use in Statistics Canada, including the Census of Population.*

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speakers[3]. In other cases mother tongue is the variable analysed. A t-test (see box) was applied to the culture participation rates to determine whether or not the difference in rates between English-speakers and French-speakers was statistically significant. This article will focus entirely on those activities for which the difference in rates is deemed significant.

Language in Canada

According to the 1996 Census, 19.3 million individuals in Canada 'spoke English most often at home'. At the same time 6.4 million individuals spoke French most often at home while 2.6 million spoke non-official languages. Over 90% of people (5.8 million) whose home language was French lived in Quebec.

Home language: language spoken most often at home by an individual.

English-speaker: an individual whose home language is English.

French-speaker: an individual whose home language is French.

Mother tongue: the first language learned in childhood and still understood by the individual.

Anglophone: an individual whose mother tongue is English.

Francophone: an individual whose mother tongue is French.

English-speakers more likely to read

The culture supplement within the 1998 General Social Survey (GSS)[4] revealed that Canadians whose home language was English were more likely to read than were those whose home language was French. In 1998, nine out of ten English-speakers read a newspaper at least once, 79% read a magazine and 69% read a book. In comparison, in the previous twelve months, 86% of French-speakers read a newspaper, 75% read a magazine and 60% read a book. People whose home language was English were also significantly more likely to use library services than were those whose home language was French (31% versus 25%) (table 1).

What is a T-Test?

A t-test was applied to the culture participation rates to determine whether or not the difference in rates between English-speakers and French-speakers was statistically significant. Several assumptions were made: the distribution of the data was normal, a two-tailed test was used at a confidence level of 95%, and the critical value equalled +/- 1.96.

The hypothesis used was that if there was little or no difference between the rates for the two language groups - that is if the difference was between 1.96 and –1.96 then it could be concluded that the difference was not statistically significant. But, should the t-test calculations result in a figure greater than 1.96 or –1.96 then the difference in the participation rates was significant.

Table 1

Participation rates in culture activities by home language, Canada, 1998

Culture activity	English	French
	%	%
Read a newspaper	90.4	85.9
Read a magazine	78.9	75.0
Read a book	69.3	60.0
Use library services	30.6	25.2
- Borrow materials	27.6	23.0
Watch a video on vcr	82.6	71.5
Use Internet	34.5	23.3
Attend theatrical performance	23.9	20.6
Attend symphonic, classical music performance	8.4	11.0
Attend choral music performance	6.4	10.3
Attend children's performance	6.8	9.7
Attend festival	20.9	33.4
Attend other popular stage performance	16.4	20.6
Visit museum or art gallery	34.5	28.2
- Public art gallery, art museum	26.2	18.9
- Commercial art gallery	8.4	13.0
- Science and technology centre	15.4	10.7
Visit a historic site	37.7	31.0
Visit a conservation area or nature park	55.0	33.6

Note: This table includes only those rates for which the t-test values were significant at the 5% level.
Source: Statistics Canada, General Social Survey, Culture Supplement, 1998.

3 *While it is understood that Quebec cannot be used as a proxy for French-speakers in all instances, it provides a useful tool to look at culture participation. It is clear that speakers of French in Quebec and those outside Quebec have different opportunities to use their language within their general community. It is likely, for example, that a Quebec-based French-speaker has greater access to a wider variety of French-language culture products than French-speakers elsewhere in Canada. So using Quebec as a proxy for French-speakers in Canada would tend to present a stronger level of culture participation by French-speakers than might actually be the case for all Canadian French-speakers. It would not, however, underestimate consumption rates for French-speakers and is seen, therefore, as a reasonable proxy for French-speakers in this study of culture participation and consumption.*

4 *The 1998 General Social Survey on time use interviewed almost 11,000 Canadians aged 15 and over in the 10 provinces to collect information about how people spent their time.*

The International Adult Literacy Survey (IALS) conducted in 1994 also showed that anglophones generally engaged more frequently in activities such as reading books or daily newspapers, writing letters or visiting the library. According to IALS, 28% of anglophones reported visiting a library at least once a month compared to 15% of francophones; 56% of anglophones reported reading a book at least once a week compared to 40% of francophones.

Research conducted by Statistics Canada using IALS described the complex relationships among education, literacy[5] and reading. Using regression analysis Corbeil[6] showed that literacy levels between anglophones and francophones are not completely related to language. Rather the differences arise largely from the historical differences in educational attainment of the two language groups. Literacy skill level rises as the number of years of schooling increases. This difference is gradually disappearing as the educational attainment of the younger generations of the francophone population increases.

Making a habit of reading every day contributes significantly to high literacy skills. People who read during their leisure time score higher on literacy tests whether their mother tongue is French or English. Even after controlling for educational attainment, the habit of reading in itself had a significant effect on literacy scores. When all other factors were controlled for, using regression techniques, people who read a newspaper at least once a week added almost 13 points to their literacy scores while reading a book at least once a week added another 11 points. Literacy is critically important in today's knowledge-based economy, which demands and rewards high-level skills. It has been shown that reading on a regular basis not only helps maintain one's literacy level but it can also improve it.[7]

Attending performances more popular for French-speaking Canadians

Canadians whose home language was French were significantly more likely to attend performances when compared with people whose home language was English. For example, in 1998, French-speakers were more likely than English-speakers to attend symphonic or classical music, choral music, children's performances or other popular stage performances. The only exception was theatrical performances for which English-speakers had a higher participation rate (table 1).

One factor which has an impact on participation rates in culture activities is the availability of these products. Performing arts require facilities for the presentation of performances. No facilities, no performances; no performances, no possibility of participation. Statistics Canada's Survey of Not-for-profit Performing Arts Companies reveals that Quebec seems to have more companies per 100,000 people than many of the other provinces. For instance, in 1998-99 there were more not-for-profit performing arts companies in Quebec (3.1 per 100,000 people) compared to Canada (2.0 per 100,000 people) (table 2).

The Canadian Arts Consumer Profile (1990-91)[8] showed that 57% of Montrealers reported attending a traditional arts performance (dance, theatre, opera or music) in the previous six months compared with only 46% for Canadians in general.

5 *According to the International Adult Literacy Survey, literacy is defined as "the ability to understand and employ printed information in daily activities, at home, at work and in the community, - to achieve one's goals, and to develop one's knowledge and potential".*

6 *Corbeil, Jean-Pierre.* Literacy in Canada: Disparity between Francophones and Anglophones. *Statistics Canada, Catalogue No. 89-573-XIE.*

7 *Statistics Canada and Human Resources Development Canada,* Reading the Future: A Portrait of Literacy in Canada, *Catalogue No. 89-551-XPE.*

8 *Decima Research and Les Consultants Cultur'inc Inc, May 1992,* Canadian Arts Consumer Profile, 1990-91: Findings.

Table 2

Number of not-for-profit performing arts companies per 100,000 population by province, 1998-99

Province	Number per 100,000 population				
	Theatre	Music	Dance	Opera	Total
Newfoundland and Labrador	1.1	0.2	0.2	-	1.5
Prince Edward Island	2.9	0.7	-	-	3.7
Nova Scotia	1.6	0.3	0.3	-	2.2
New Brunswick	0.5	0.3	0.1	0.1	1.1
Quebec	1.9	0.7	0.4	0.1	3.1
Ontario	0.9	0.5	0.3	0.1	1.8
Manitoba	0.8	0.5	0.3	0.1	1.7
Saskatchewan	0.7	0.3	0.2	0.1	1.3
Alberta	0.8	0.3	0.2	0.1	1.4
British Columbia	0.8	0.5	0.4	-	1.7
Canada	**1.1**	**0.5**	**0.3**	**0.1**	**2.0**

Source: Statistics Canada, Survey of Performing Arts Companies, 1998-99.

In addition, attendance at performances of the traditional arts was significantly higher among Montrealers. While only 23% of Montrealers had never attended a traditional arts performance, in contrast, almost one third (32%) of all Canadians had never attended an arts performance.

Festivals attract more French-speakers

Canadians whose home language was French were significantly more likely to attend festivals than were those whose home language was English. In 1998, 33% of French-speakers attended at least one festival while 21% of English-speakers reported doing so.

According to data collected by the Culture Initiative Program of the Department of Canadian Heritage, Quebec recorded the highest attendance at festivals in both 1998 and 1999 (6,179,000 and 7,927,000, respectively). This represented almost 50% of all festival attendance in Canada in 1998 and close to 60% in 1999. This is not surprising given that the top three festivals in Canada, in terms of attendance, are all in Quebec. They are Festival d'été international de Québec (1999 attendance 2,500,000), Festival Juste pour Rire/Just for Laughs (1,157,000) and Festival International de Jazz de Montréal (1,609,000).

Quebec has high attendance levels at festivals even though they do not have a greater than average supply of festivals. In both 1998 and 1999, Quebec recorded .5 festivals per 100,000 people, which was lower than the rates recorded by many other provinces (table 3).

What do we mean by the "performing arts" and "heritage institutions"?

Theatrical performance: includes drama, comedy, dinner theatre, avant-garde theatre and musicals (rock operas such as Tommy, Broadway style shows such as My Fair Lady and West Side Story and music/theatre spectacles such as Phantom of the Opera, and Kiss of the Spiderwoman).

Symphonic/classical music performance: includes symphonic music, symphonic "pops" concerts, and contemporary classical music.

Choral music performance: refers to music performed by a choir or choral ensemble. It may be of a religious nature.

Children's performance: can include music, theatre or drama geared to a children's audience.

Festival: cultural or artistic festivals such as film, fringe, dance, jazz, folk, rock, buskers or comedy. Examples include Toronto International Film Festival, Ottawa Jazz Festival, Edmonton Fringe Festival, and Montreal's Just for Laughs.

Other popular stage performance: includes circus, stand-up comedy, and ice shows.

Public art gallery/art museum: includes art galleries, museums of photography, cinema, architecture, and art exhibition galleries permanently maintained by libraries and archives.

Commercial art gallery: stores where art is exhibited and sold.

Historic sites: includes historic sites, buildings or parks which have been designated as being of historic value and made accessible through guided tours or plaques highlighting events or people of interest. Examples include Alexander Graham Bell Homestead in Nova Scotia, Batoche National Historic Park in Saskatchewan and Upper Canada Village in Ontario.

Conservation area or nature park: includes provincial and national parks, interpretation centres and wildlife areas and reserves. Excluded are recreation/leisure parks such as those featuring water slides and related water sports.

Table 3
Number of festivals by province, 1998 and 1999

Province	Festivals per 100,000 population	
	1998	1999
Newfoundland and Labrador	0.6	0.4
Prince Edward Island	2.2	1.5
Nova Scotia	1.1	1.1
New Brunswick	0.7	0.9
Quebec	0.5	0.5
Ontario	0.4	0.4
Manitoba	0.7	0.6
Saskatchewan	0.6	0.6
Alberta	0.3	0.3
British Columbia	0.8	0.7
Yukon	9.5	9.7
Northwest Territories	7.3	7.3
Canada	**0.5**	**0.5**

Source: Department of Canadian Heritage, Culture Initiatives Program, 1998 and 1999.

English-speaking Canadians enjoy visiting heritage institutions

English-speakers had significantly higher rates of visiting heritage institutions than did French-speakers. More specifically, in 1998, according to the GSS, English-speakers were more likely to visit public art galleries, art museums, science and technology centres, historic sites and parks, conservation areas and nature parks. The exception was for commercial art galleries where French-speakers reported a higher participation rate (table 1).

One possible explanation for this pattern may have to do with the supply of heritage institutions and nature parks by province. Data from Statistics Canada's Survey of Heritage Institutions show that Quebec has fewer heritage institutions per 100,000 people than the national average. In 1997-98, this province had 4.9 heritage institutions per 100,000 people compared to 7.8 for the country as a whole. There were also fewer nature parks and conservation areas per 100,000 people in Quebec than in all but one other province (table 4).

Table 4

Number of not-for-profit heritage institutions per 100,000 population by province, 1997-98

Province	Number per 100,000 population	
	Heritage institutions[1]	Nature parks[2]
Newfoundland and Labrador	15.7	1.4
Prince Edward Island	10.9	0.7
Nova Scotia	18.9	0.3
New Brunswick	15.2	0.4
Quebec	4.9	0.3
Ontario	4.6	0.5
Manitoba	16.5	1.1
Saskatchewan	26.5	1.6
Alberta	8.1	0.8
British Columbia	9.3	0.4
Canada	**7.8**	**0.5**

1 Includes museums, archives, historic sites, buildings, parks or communities, planetariums, observatories, aquariums, zoos, botanical gardens, arboretums, etc.
2 Includes nature parks and conservation areas with interpretation or educational programs. This category also includes wildlife areas and interpretation centres.
Source: Statistics Canada, Survey of Heritage Institutions, 1997-98.

A survey conducted in 2000 by Environics Research[9], on behalf of the Department of Canadian Heritage, also found that anglophones were much more likely than francophones to have visited museums (63% versus 46%) and historic sites (66% versus 52%) at least once in the previous five years. An analysis of provincial data reveals that Quebeckers tended not to visit certain cultural heritage institutions such as historic sites as much as other Canadians.

These patterns may be partly linked to differences in travel patterns of English-speakers and French-speakers in Canada and abroad. A study by Richardson and Crompton[10] shows that English-speakers have a greater propensity to travel during their vacation time than do French-speakers. If one assumes that one thing Canadians may do while travelling within Canada is to visit museums and heritage sites, then French-speakers, who travel less, may be less likely to go to heritage institutions.

Watching television the most popular for French-speakers in Quebec

Residents of Quebec have long been the leaders in television viewing. In the fall of 2000 they reported watching television for an average of 24.0 hours per week compared to 21.5 hours for Canada. Television is most popular among French-speaking Quebeckers. Their weekly viewing time averaged an estimated 24.5 hours, about 4 hours more than English-speaking Quebeckers and 3 hours more than the Canadian population as a whole.

Not only do French-speakers watch more television than English-speakers – they also watch more Canadian programming than do English-speakers. This may be due, in large part, because of the greater diversity of non-Canadian television programming available to English-speakers. For example, in fall 2000 French-speakers spent 66% of their viewing time watching Canadian programs compared with 30% for English-speakers. This pattern also holds for young Canadians. French-speaking children aged 2-11 spent 51% of their viewing time watching Canadian-made programs compared with 28% for their English-speaking counterparts. In the same year, French-speaking teens (aged 12-17)

9 *Environics Research Group Limited for the Department of Canadian Heritage.* Arts and Heritage Participation Survey, Final Report. *September 2000.*
10 *Richardson, Sarah L. and Crompton, John, 1988. "Vacation Patterns of French and English Canadians."* Annals of Tourism Research, *vol. 15.*

spent 58% of their viewing time watching Canadian programs compared with 22% for English-speaking teens.

Of all types of programming, the most popular in the fall of 2000 was the category of drama and comedy combined (39% of viewing time) followed by news and public affairs (24% of viewing time). These preferences were much the same among both language groups. Where the two groups differed, however, was in program content (Canadian or foreign). Francophones spent 41% of their viewing time of comedy and drama watching Canadian programs compared with only 10% for anglophones. Canadian content was widely preferred in news and public affairs programs, particularly by francophones, who spent 96% of their viewing time in this category watching Canadian programs, compared with 73% among anglophones.

This difference in viewing hours between the two language groups may be, in part, because French-speaking Canadians do not have access, in their language, to the range of foreign programs available to English-speaking Canadians on American channels.

English-speaking Quebeckers spend the most time listening to the radio

In the fall of 2000, the most avid radio listeners in all of Canada were English-speaking Quebeckers. They recorded the highest listening rate (22.4 hours per week), which was two hours more than the national average. This pattern has been consistent over time.

Language a barrier to Internet surfing for French-speaking Canadians

Quebec households are less likely to own a home computer than households in other provinces. The 1999 Survey of Household Spending showed that 42% of households in Quebec owned a computer compared with 55% of households in Ontario and British Columbia and 58% of households in Alberta. Quebec households were also less likely to report owning a modem than were many households in other provinces. It is therefore not surprising that other Statistics Canada data reveal that Internet use differed by home language. For instance, the General Social Survey showed that rates of Internet use differed significantly by home language. In 1998, 35% of Canadians whose home language was English used the Internet compared with 23% of those whose home language was French (table 1). More specifically, English-speakers had higher rates than French-speakers of using the Internet to communicate, do research, read a newspaper, magazine or book, do electronic banking or download software.

Statistics Canada's Household Internet Use Survey conducted in 2000 confirms these data. It also found that French-speakers were less likely to use the Internet than English-speakers. In this study, about 44% of French-speakers used the Internet in 2000 compared with 58% of English-speakers. Of all of those who had used the Internet in the previous twelve months, 20% said that they had accessed the Internet in French and 93% said they had accessed the Internet in English. French-speaking Internet users felt that language was a barrier to their use of the Internet. They were less satisfied than English-speakers that they had enough Internet content in the official language of their choice: about 62% of French-speakers who used the Internet believed there was enough Internet content in their language of choice compared to 99% of English-speaking Internet users.

However, recent surveys tracking Internet use have shown that French-speakers are increasing their use of this media. Data from Media Metrix[11] show that French-speaking Canadians increased their at-home Internet use by 29% between 1999 and 2000. They also show that there is a lot of traffic by Quebeckers on sites in France, suggesting their use has increased as more French language sites have become available.

Where do we go from here?

On the surface at least, language seems to play an important role in Canadians' participation in culture activities. Of course, much more rigorous research is required before we can fully explain the links. However, in some cases at least – namely television and the Internet – the supply of content in the preferred language is an important explanatory variable.

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[11] *Hunter, Janet, 2001. "At-home Internet Use Rises 18%; Francophone Users Increase 29%".* Ottawa Citizen, *Thursday July 26.*

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Tourism and culture: A developing partnership

By Michel Durand and Marla Waltman Daschko

For many countries, tourism has become an increasingly important economic activity; it is now common practice for national governments to develop policies to encourage its growth. Strategies tend to be based on the marketing of distinctive national identities that act as a focus for visitor experiences. In England, France or Italy, culture and tourism form an age-old partnership, based on the world-renowned historic architecture, galleries, museums and performing arts found in those countries. Specialized marketing of culture and heritage has been able to provide other younger nations, such as Canada, with important tools to encourage tourism and to reap some of its benefits.

Since the end of World War II, travel has become a worldwide middle class phenomenon. While travel has always been a means for the wealthy to pursue personal interests, the growth in world tourism is an indication of the broader opportunities now available to the less affluent. The growth of culture, heritage, adventure, sports or other specialized travel is an indication of this trend.

Tourism and culture are often seen as intertwined; culture is touted as a goldmine for tourism and tourism is proposed as a potential saviour of the arts. Some argue that the tourist economy can contribute to local cultural development by increasing audiences and revenues for performing arts and heritage institutions, raising their profile, and communicating Canadian culture and heritage to the world. At the same time, culture institutions may be the essential ingredients that attract some types of tourists to a particular city, region or nation. Culture and heritage tourism capitalize on market demand for quality cultural experiences and, for niche segments such as learning travel, offer tourists experiences unique to that destination[1].

The importance of culture to the tourism industry is demonstrated by the beneficial effect it has on local economies. Examples include the Stratford Theatre Festival, which contributes many jobs to the local economy; special exhibits such as the Renoir exhibition at the National Gallery of Canada which attracted record numbers of visitors; the Festival international de jazz de Montreal which is one of the largest festivals in Canada; and the Fortress of Louisbourg, a UNESCO historic site which welcomes visitors from around the world. Some culture businesses (e.g., festivals, performing arts, and heritage institutions) earn their most significant foreign revenues, not from touring abroad, but from foreign tourists visiting Canada. It is therefore not surprising that many organisations and businesses are responding to these growing markets by developing new products to appeal to visitors. In concert with this, travel agencies and tourist offices are using culture to promote Canada to homegrown audiences and tourists alike.

Over the past two decades, one of the goals of federal tourism policy in Canada has been to improve the nation's position in the international tourism market. In 1999, Canada proposed a new five-year business strategy with a focus on cultural and heritage tourism. The Canadian Tourism Commission (CTC) "identified culture in its broadest sense as a key component of the tourism industry.[2]" Underlying the strategy is the idea that cultural tourism is growing around the world and trends point to increasing demand for these types of experiences. A major motivator of tourism is learning what is special about a place's culture and heritage. This argument is based on data, for example, from the World Tourism Organization (WTO) that 37% of all international trips include a cultural component and that this market has been growing at the rate of 15% a year[3].

Canada ranked 7th among the most popular tourist destinations

International tourism has been growing steadily since 1950, as has the geographic diversity of the destinations that travellers choose to visit. In 1950, 25 million international arrivals were split among only 15 countries, whereas, just fifty years later, in 1999, more than 70 countries and territories attracted more than one million

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[1] *While this argument has its detractors (see Gay Hawkins, "Touting for Tourists",* Culture and Policy, *former Journal of Australian Key Centre for Cultural and Media Policy, Vol. 2, No. 1 at http://www.gu.edu.au/centre/cmp/journal.html), it underlies the culture tourism business strategies that have been designed by many nations including Canada, the United States, Australia, New Zealand and the European Union.*

[2] *"Culture, the State, and Tourism: State Policy Initiatives in Canada, 1984-1992", in* Culture and Policy: Post-Colonial Formations, *Vol. 6, No. 1, 1994, p.4.*

[3] *Statistics Canada,* Tourism Statistical Digest, 2000 *(Cat. No. 87-403), p. 9.*

What is culture tourism?

For the purposes of this article, culture tourism is defined as any trip that includes participation in at least one of the following culture activities:

– Attending a festival, fair or exhibition
– Attending cultural events/performances (plays, concerts)
– Attending aboriginal/native cultural events
– Visiting a museum or art gallery
– Visiting a zoo, aquarium, botanical garden
– Visiting a theme or amusement park
– Visiting a nature park or an historic site
– Sightseeing
– Bird-watching or observing wildlife

The following culture activities were not captured in the tourism surveys so cannot be included in this analysis of culture tourism:

– Library use
– Attending movies
– Purchases of books, magazines or newspapers
– Purchases or rentals of CD's or other recordings
– Purchases or rentals of videocassettes

Readers will note that the methodology for this article has changed from that used in the Statistics Canada publication, "Canadian Culture in Perspective: A Statistical Overview, 2000 Edition" (Catalogue no. 87-211-XPB). That publication used a more limited definition of culture activities in tourism, excluding sightseeing and bird-watching/observing wildlife.

international tourists each. The 15 most popular destinations now account for less than two-thirds of all international tourist arrivals[4].

Between 1950 and 1999, total arrivals world-wide grew at an average annual rate of 7%[5], and in 2000, the total number reached a record 699 million[6]. All regions of the world hosted more tourists in 2000, including Canada[7], which has seen its ranking among the top world tourist destinations improve significantly over the last decade. Canada ranked seventh among the most popular destinations in the world in 2000, an improvement over its eleventh place in 1995 and tenth place in 1990[8].

Canada as a tourist destination

In 2000, total spending by travellers in Canada was worth over $35 billion dollars. Of this amount, travellers spent over an estimated $1.1 billion, or 3.2%, on culture activities and events. Between 1996 and 2000, total tourist spending grew by almost 30% while culture spending grew marginally faster (31%) (table 1). This relationship is mirrored in a comparison of annual spending while controlling for inflation. Converting spending data to constant 1992 dollars, there was still real growth of 21% in total spending and 22% in culture spending between 1996 and 2000.

In its discussion of Canadian and foreign travellers, this article compares overnight visits rather than all visits to Canada. In general, overnight visitors have more time than same day visitors to participate in culture activities. In addition, only by comparing overnight visits can one produce a fair comparison of travel in Canada.

[4] *Ibid.*
[5] *Statistics Canada, "Canada's competitiveness in the U.S. travel market"*, Travel-log, *Vol. 20, No. 1 (Winter 2001), p. 1 (Catalogue No. 87-003).*
[6] *World Tourism Organization (WTO), August 2001*, Updated Tourism Highlights 2001, *http://www.world-tourism.org/market_research/data/menu_data.htm*
[7] *Ibid.*
[8] *WTO,* 'World Tourism Highlights 2001," *http://www.world-tourism.org*

How is culture spending by tourists measured?

The economic value of culture tourism in Canada is estimated by the expenditures on culture attractions, events or activities by domestic and foreign tourists. This value is computed irrespective of the purpose of the trip, whether for visiting friends or relatives, for pleasure, for personal reasons, or for business or convention purposes.

The Canadian Travel Survey (CTS), which is conducted as a regular supplement to Statistics Canada's monthly Labour Force Survey (LFS), was first run in 1979, and beginning in 1980, every two years up to 1996. Since 1997, the survey has been annual. The CTS was developed to measure the volume, characteristics and spending associated with domestic travel, which is defined as same day or overnight travel to Canadian destinations with a one-way distance of 80 kilometers or more from home. The most recent data available for this survey is for 1999; spending data for 2000 are estimates only.

Data on international travel between Canada and other countries originated in the early 1920s as a requirement for the Canadian Balance of Payments. As travel gained in volume and economic importance, the travel industry voiced the need for more detailed characteristics on the traveller such as purpose of trip, origin and destination, type of accommodation, spending detail, etc., and there are now continuous questionnaire surveys used to collect information on the expenditure and other characteristics of the international traveller. The most recent data available for this survey are for 2000.

See the Statistics Canada publication Travel-Log, summer 2001 issue, for a related article about domestic travel by Canadians entitled "Canadians' Participation in Culture/Heritage Travel in Canada" (Catalogue No. 87-003, Vol. 20, No. 3).

Table 1

Culture spending by Americans exceeds spending by other visitors

	1996	1997	1998	1999	2000	% change: 1996 to 2000
All spending by tourists in Canada				($000,000)		
Canadian tourists	16,218	16,258	18,713	19,620	20,601 p	27
United States tourists	6,258	6,669	8,357	8,903	9,248	48
Overseas tourists	4,538	4,530	4,474	4,901	5,198	15
Total spending in current dollars	27,013	27,457	31,544	33,423	35,048	30
Total spending in constant 1992 dollars	25,508	25,518	29,046	30,247	30,879	21
Culture spending by tourists in Canada				($000,000)		
Canadian tourists	311	338	378	393	413 p	33
United States tourists	303	328	374	411	414	36
Overseas tourists	229	223	247	247	279	22
Total culture spending in current dollars	843	889	999	1,051	1,106	31
Culture spending in constant 1992 dollars	797	826	919	951	974	22
Culture share (%) of all spending (all tourists)	3.1	3.2	3.2	3.1	3.2	1.1

p *Preliminary estimated data*

Source: Statistics Canada, Canadian Travel Survey and International Travel Survey, 1996 to 2000.

While tourists from the United States or Canada are able to make same day trips, this is very difficult for overseas visitors. Given the distance, an average of 94% of all trips by overseas visitors, between 1996 and 2000, were overnight visits[9].

Canadian tourists at home

Participation in cultural activities among the general Canadian population is quite high, with over half of Canadians aged 15 and over indicating that they had visited a museum, art gallery or attended a festival, fair or exhibition in 1998[10]. When Canadians take a domestic trip, therefore, it is not surprising that many include a culture or heritage activity on their travel agendas; in some instances, it may be their main motivation for making a trip.

In 1999, Canadians took over 73 million overnight trips in Canada and stayed away from home for an average of 3.3 nights (table 2). Overnight trips made up 51% of their domestic travel. Of the 235 million activities undertaken by Canadian overnight visitors in 1999, over 18% (42 million) were defined as culture-based. Sightseeing (42%) and visiting heritage institutions and sites (39%) were the most popular culture activities for Canadian tourists.

Between 1996 and 1999 there was a growth of almost 12% in the number of culture activities pursued by domestic tourists, but it was slower than the 26% growth measured for all tourist activities. In fact, culture's share of tourist activities dropped by more than 11% over the same period. This may be due to the higher cost of some culture activities; the cost of attending the performing arts or visiting museums and historic sites increased throughout the 1990's. This is reflected by data which shows that the average number of culture activities per overnight trip by Canadians grew by 7% between 1996 and 1999, but the average expenditure per trip grew by 15% (table 2).

Through their culture activities, domestic overnight visitors spent an estimated $303 million in 1999, a 20% growth in spending over 1996.

9 *Most of the same day visits consisted of individuals who were in-transit and for whom Canada was just a stopover.*

10 *Statistics Canada, General Social Survey, 1998.*

Table 2

Culture activity by Canadian overnight tourists is low, 1996 to 1999

Overnight trips by Canadian visitors	1996	1999	% Change: 1996 to 1999 Total
Person-trips (000,000)			
Number of all person-trips	135.3	143.2	5.8
Number of overnight person-trips	70.5	73.5	4.3
Average duration of overnight trips (# of nights)	3.2	3.3	1.2
Activities - Overnight trips (000,000)			
All tourist activities	186	235	26.3
- Recreation, sport, culture activities	119	136	14.1
- Culture activities	38	42	11.7
Culture share of all tourist activities (%)	20	18	-11.5
Average number of culture activities per overnight trip (#)	0.5	0.6	7.1
Spending - Overnight trips - ($ 000,000)			
Total spending	13,073	15,713	20.2
- Recreation, sport, and culture	793	974	22.9
- Estimated culture spending	253	303	20.0
Average expenditure on culture activities per overnight trip ($)	3.58	4.12	15.1
Average cost of overnight trips ($)	185.43	213.79	15.3

Source: Statistics Canada, Canadian Travel Survey, 1996 and 1999.

Overseas visitors the most active culture consumers

Using absolute numbers, Canadian travellers dominate tourism in Canada; in 1999, almost three out of four travellers in Canada were Canadians. That same year Canada also welcomed almost 45 million overnight visitors from the United States and over 4 million from other countries (table 3). This flow of foreign tourists, while fewer in number than Canadian travellers, has a greater impact proportionally on culture spending and participation.

In 1999, the majority of culture spending (68%) came from foreign overnight visitors ($649 million). Canadian tourists, who made up 60% of all overnight visits, accounted for just 32% of culture spending in 1999, for an average of $4.12 per person-trip. American overnight visitors made up 36% of person-trips but expended 42% of all culture spending, for an average of $9.02 per person-trip. It is overseas visitors, however, who were the most active. While they made up only 3% of all person trips, foreign tourists were responsible for 26% of all culture expenditures and spent an average of $58.94 per person-trip (table 3). With respect to participation, overseas visitors averaged 2.1 culture activities per overnight trip, compared to Canadians (.6) and Americans (1.4).

Recent studies in Ontario confirm that foreign visitors had a much higher rate of participation in cultural activities when visiting Ontario than did Canadian visitors from Ontario, Quebec and Manitoba[11]. The study found, in general, that "the further away a visitor to Ontario came from, the higher the chance that he/she will participate in cultural activities." They suggest that Ontarians' low participation rate in cultural activities in the province may be the result of a "familiarity" syndrome, plus the fact that Ontarians tend to choose outdoor over 'cultural' destinations when travelling at home. The report states that "Low participation rates in cultural activities by its own residents were not unique to Ontario, but were also observed among residents of all other Canadian provinces when they took trips in their own province.[12]" This emphasizes the great scope that exists for the building of a larger and more vibrant cultural tourism market in Canada for Canadians.

The latest American invasion of Canada

In 2000, Americans visits to Canada reached 44 million trips (table 4), just 1.3% below the previous year's all-time high of 44.6 million trips. American travellers took over 15 million overnight trips to Canada in 2000, which represented their second largest volume of trips since 1972, surpassing even the event-packed year of 1986 which included Expo 86 in Vancouver. Over the past decade, an increasing number of United States overnight travellers have been coming to Canada to see cultural events and attractions, with the number of cultural activities in 2000 visited reaching close to 20 million activities, an almost 9% increase over 1996 (table 4).

Overnight spending levels by Americans on culture-related activities rose by 37% to $402 million between 1996 and 2000. Like Canadians, Americans' favourite cultural activities were visiting heritage institutions and sightseeing, but they tended to

[11] *Ministry of Tourism, Culture and Recreation, Province of Ontario, 2001, The Tourism Monographs, No. 25, August 2001.* "Ontario's Overnight Cultural Tourists – 1999.

[12] *Ibid.*, p. i.

Table 3

Foreign overnight visitors responsible for 68% of all spending on culture by travellers, 1999

Overnight trips	Share of Total number of overnight person trips	Share of estimated culture spending	Total number of overnight person trips	Estimated culture spending	Expenditures per person-trip
	%	%	($000,000)	($000,000)	($000,000)
Canadian tourists	60	32	74	303	4.12
United States tourists	36	42	45	402	9.02
Overseas tourists	3	26	4	247	58.94
Total	**100**	**100**	**122**	**952**	**7.78**

Source: Statistics Canada, Canadian Travel Survey and International Travel Survey, 1999.

Table 4

Number of American overnight trips continued at high levels, 2000

Overnight trips by American visitors	1996	1999	2000	% Change: 1996 to 2000 Total
Person-trips (000,000)				
Number of all person-trips	38.5	44.6	44.0	14.3
Number of overnight person-trips	12.9	15.2	15.2	17.8
Average duration of overnight trips (# of nights)	3.9	3.9	3.9	-0.3
Activities - Overnight trips (000,000)				
All tourist activities	49	57	56	15.0
- Recreation, sport, culture activities	32	36	36	12.9
- Culture activities	18	21	20	8.8
Culture share of all tourist activities (%)	37	36	35	-5.4
Average number of culture activities per overnight trip (#)	1.4	1.4	1.3	-7.7
Spending - Overnight trips - ($000,000)				
Total spending	5,150	7,149	7,448	44.6
- Recreation, sport, and culture	502	701	713	42.1
- Estimated culture spending	294	401	402	37.0
Average expenditure on culture activities per overnight trip ($)	22.76	26.38	26.45	16.2
Average cost of overnight trips ($)	399.22	470.31	490.02	22.7

Source: Statistics Canada, International Travel Survey, 1996, 1999, 2000.

participate in more culture activities per trip. This may be explained by the longer average length of overnight trips by Americans than Canadians (3.9 versus 3.3 nights per trip respectively).

For Americans, culture made up a much larger share of total recreation activities than it did for Canadians. In 1999, 56% of all activities of American overnight visitors were culture activities, compared to 31% for Canadians. The reason could be that Canadians often visit relatives or friends when they travel at home whereas American visitors may be more likely to travel to Canada for the purposes of tourism.

Overseas visitors starting to return to Canada

Canada welcomed close to 4.4 million overnight visitors from foreign countries (excluding the United States), in 2000, a modest increase over 1999 but a return to 1996 levels (table 5). While overnight overseas travellers are more likely to visit friends or family than U.S. travellers, using 2000 as an example, they also tend to take longer (11.2 compared to 3.9 days), and more costly trips ($1,181 compared to $490).

Overseas travellers spent over $279 million on cultural activities and events during their overnight visits in 2000, 13% more than the previous year, and 22% compared to 1996 (table 5). The greater expenditures per trip, compared to American or Canadian travellers, is due to the longer duration of their visits and the greater distances needed to travel to Canada.

In 1997, Canada's traditional markets remained relatively flat as poor economic growth and depreciating currencies slowed tourism traffic. Most of the downturn in visitations involved Asia (Japan, Hong Kong and South Korea), a direct result of the financial crisis in those countries. The Asian crisis began to take hold in the latter part of that year and the number of Asian travellers journeying to Canada dropped 9%. The majority of this decline was due to a 13% drop from Japan. The Asian market still represented almost one-

Table 5

Overnight overseas visitors are avid consumers of culture activities, 1996, 1999, 2000

Overnight trips by overseas visitors	1996	1999	2000	% Change: 1996 to 2000 Total
Person-trips (000,000)				
Number of all person-trips	4.8	4.4	4.6	-4.2
Number of overnight person-trips	4.4	4.2	4.4	0.4
Average duration of overnight trips (# of nights)	10.7	11.3	11.2	4.5
Activities - Overnight trips (000,000)				
All tourist activities	22	21	22	0.9
- Recreation, sport, culture activities	14	14	14	0.6
- Culture activities	10	9	9	-2.1
Culture share of all tourist activities (%)	44	43	43	-3.0
Average number of culture activities per overnight trip (#)	2.2	2.2	2.1	-2.4
Spending - Overnight trips - ($000,000)				
Total spending	4,520	4,892	5,188	14.8
- Recreation, sport, and culture	329	370	413	25.7
- Estimated culture spending	229	247	279	22.0
Average expenditure on culture activities per overnight trip ($)	52.20	58.94	63.44	21.5
Average cost of overnight trips ($)	1,033	1,168	1,181	14.4

Source: Statistics Canada, International Travel Survey, 1996, 1999, 2000.

third of Canada's overseas visitors in 2000, down 16% in market share over 1996. The downturn in the Asian market is the first major one that has occurred over the past two decades.

Over the same period, some emerging markets, such as 'Central and Other North America'[13], recorded double-digit growth (54%) in market share over the same period. Travel from all major European markets, on the other hand, displayed marginal increases (6% increase in market share). Unfavourable economic conditions in some of these countries and the associated appreciation of the Canadian dollar against most European currencies have adversely affected these markets.

Motivation of Canadian and American tourists in Canada

What motivates tourist decisions is a critical issue for the Canadian culture and tourist industries. An understanding of the factors that motivate travellers will allow planners to build on existing successes and find ways to encourage more tourists to participate in the cultural attractions that Canada has to offer.

A Canadian study, Travel Activities and Motivation Survey (TAMS)[14], analyzed data covering December 1997 to November 1999. It provides some insights into the consumption of cultural and entertainment activities by Canadians and Americans while on vacation in Canada. The report finds that travellers in urban markets who participated in the culture and entertainment market can be divided into three categories and seven sub-groups. The types of travellers, all of which have different levels of interest in culture, are defined as being Minimalists (35%); or having a Culture Orientation (25%) or Entertainment Orientation (40%). The two key sub-groups of travellers who demonstrate a significant interest in culture are Knowledge Seekers and Culture Seekers, both of which are included in the Culture Orientation category.

According to TAMS, Culture Seekers[15] represent 9% of Canadian urban travellers and 12% of American urban travellers. They are the oldest, and among the most affluent and best educated, of the Culture and Entertainment segments, and are most likely to be mature couples or singles. The study found that Culture Seekers are much more likely than other urban travellers to visit museums, art galleries and historic sites while on vacation. They also exhibit considerable interest in fine arts such as the ballet and live theatre, botanical gardens and natural attractions. Culture Seekers also show real interest in treating themselves while on vacation (e.g. fine dining, casino gambling, and nightlife), or taking a wine tour or ocean cruise. This suggests that an effective method of attracting Culture Seekers would be the promotion of opportunities for learning and cultural enrichment in concert with access to fine cruises, wine, luxury settings and nightlife. The link between attending cultural activities at home and while on vacation is very strong for Culture Seekers. The people who go to the ballet, opera or live theatre, visit heritage institutions, attend concerts or dine in fine restaurants at home also do these things when they are away.

Knowledge Seekers[16], who represent 11% of Canadian urban travellers, and 13% of American urban travellers, are among the best educated of all seven categories of travellers. They are primarily younger families, mature couples and mature singles. Knowledge Seekers are much more likely to visit historic sites, art galleries, museums, zoos, aquariums and planetariums while on vacation. They also exhibit an above average interest in aboriginal cultural attractions. However, unlike other travellers with children, Knowledge Seekers are unlikely to visit an amusement park or professional sporting event. Nor do they indulge much in fine dining, casino gambling or nightlife while on vacation.

The other segments examined in the study showed varying degrees of interest in cultural and entertainment activities while on vacation. Entertainment Seekers, for example, also show an interest in historical institutions, the performing arts and festivals. Finding ways to encourage travellers with a latent interest in cultural and entertainment activities while travelling is a challenge for both the culture and tourism communities. What is understood by both communities is that culture and heritage tourism is a market that is largely untapped.

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13 *Includes Mexico.*

14 *Lang Research, June 2001,* Travel Activities and Motivation Survey: Culture and Entertainment Segmentation. *Government of Ontario: http://www.tourism.gov.on.ca/english/research/tams.asp. TAMS Executive Summary available at http://www.canadatourism.com/en/ctc/ctx/ctx-ind_watch/tourism_stats/tams.cfm.*

15 *Ibid.*, pp. 22-51.

16 *Ibid.*, pp. 52-82.

Tourism and September 11, 2001

Any new analysis of culture tourism must recognize the enormous effects on travel of the September 11, 2001 terrorist attacks in the United States. Tourism is strongly influenced by the social, economic and political climate of the visitors' country of residence and their destination. Decisions about holiday travel tend to be more flexible than those for business travel, so recreational travel may be more prone to the effects of changing economic or political events. In fact, all travel, including tourism, has been hit hard by the terrorist attacks in the United States and the resulting war in Afghanistan and by an international economic decline.

According to the World Tourism Organization (WTO), travel reservations world-wide at the end of October 2001 were estimated to be down 12 to 15 percent from levels the previous year[18]. Before the September 11th attacks, it was thought that world tourism was on track for a small increase of 3-4% in 2001. Now the WTO estimates those 2001 year-end results will show growth of only 1% in tourist arrivals.

With respect to international tourism, Canada had been on its way to a banner year as a tourist destination. The $202 million travel deficit for the second quarter of 2001 was at a 15 year low and overnight international travel to Canada posted its highest second-quarter result in the 27 years that travel data have been collected[19].

In constant dollars, however, national tourism indicators show that the overall tourism economy in Canada was already falling into a recession before the events of September 11[20]. Following the terrorist attacks, travellers in Canada and abroad have cancelled or postponed trips in record numbers. Foreign travel to Canada declined 24% in September 2001 compared to the previous year; when adjusted seasonally, it dropped 25% in September compared with August. These declines were the greatest in 25 years[21].

The examination of culture activities by tourists in Canada in this issue *of Focus on Culture* is an analysis of travel in a pre-September 11th environment. How and if travel will return to these levels remains an open question. Past experience, however, provides some grounds for comparison. According to the Canadian Tourism Commission, after tourism fell because of the 1991 Persian Gulf War, the world tourism industry recovered but it took four to five years for it to do so[22].

The WTO is optimistic about returns to normalcy. According to WTO Secretary-General Francesco Granfialli, "We expect the industry to begin to come back as the global economy improves in the second half of 2002... people need to travel for business and people nowadays consider holidays to be more of a necessity than a luxury, so the tourism industry proves time after time to be a very resilient one." [23] So, while we cannot know if there will be permanent change to culture tourist behaviour because of terrorism, there is reason to believe that travel within and to Canada will eventually return to pre-September 11 patterns.

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18 *WTO, Special Report No. 18. November 2001,* Summary document: "Tourism after 11 September 2001: Analysis, remedial actions and prospects", *p.8., http://www.world-tourism.org/newsroom/Releases/more_releases/December2001/specialreport.html*

19 *Statistics Canada,* The Daily*, "International travel account," 28 November 2001.*

20 *Canadian Tourism Commission (CTC),* "Tourism,*" November 2001, p. 6. http://www.canadatourism.com/en/ctc/ctx/ctx-news/communique/communique.cfm?version=tourism*

21 *Statistics Canada,* The Daily*, November 28, 2001, "Travel between Canada and other countries September 2001," at http://www.statcan.ca/Daily/English/011128/td011128.htm*

22 CTC Tourism Intelligence Bulletin – Issue 1: *October 2001, p. 3, at the CTC website, http://www.canadatourism.com/en/ctc/ctx/ctx-news/advisory/pdf/bulletinoct2001.pdf*

23 *WTO,* press release, *12 November 2001.*

Conclusion

If countries are to compete in today's tourism market place they must offer a "product" that both meets changing consumer demands and differentiates them from other competitors. Innovative approaches are needed to attract the attention of a domestic and international public. The culture sector competes with many other recreational attractions that want the same consumer dollar. While culture businesses and institutions have the potential to reach new and expanded audiences, traditional methods may no longer be sufficient to attract those audiences. What is needed is an expansion of the growing, but still relatively new, relationship between culture and tourism in Canada.

Not only are planners looking at ways to encourage new visitors to Canada from foreign countries, they are looking seriously at methods to market their products and attractions to outbound nationals who may be amenable to travelling within Canada instead. Promoting Canada as an exciting place for a longer vacation, with a wide variety of interesting things to see and do, could help to increase the numbers of Canadians participating in culture activities.

With increasing tourist demand for unique and authentic experiences, growth in culture-oriented vacations is expected in the future[17]. Many participants in the tourism industry are already realizing the advantages of forging partnerships with the culture and heritage communities. Tourism businesses and organizations that take the lead in such holiday experiences may reap new benefits in the future.

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[17] *Canadian Tourism Research Institute, 1997,* Travel Forecast 2000: Twenty-One Questions for the 21st Century.

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DID YOU KNOW? New data for the Canadian sound recording industry, 1998

Table 1

Sound recording industry in Canada, 1998

Number of companies	**280**
Size of companies	
Revenue less than $50,000	142
Revenue $50,000 to $99,999	25
Revenue $100,000 to $999,999	72
Revenue $1,000,0000 and over	41
Number of new releases by musical category	
Popular music/rock[1]	2,478
Classical and related	1,667
Jazz	595
Country and folk	466
Children's	152
Other[2]	1,370
Total	6,728
Number of new releases by language of recording	
English lyrics	4,402
French lyrics	284
Other	2,042
Total	6,728

1 Popular music and rock were classified in one category in 1998.
2 Includes unspecified.
Source: Statistics Canada, Sound Recording Survey,1998.

Table 2

Small number of foreign-controlled companies dominate recording industry, 1998

Indicator	Foreign-controlled	Canadian-contolled	Total industry	% share of foreign-controlled companies
				%
Number of companies	17	263	280	6.1
Number of new releases	4,778	1,950	6,728	71.0
Canadian artist	202	821	1,023	19.7
Other	4,576	1,129	5,705	80.2
Total recording sales ($millions)	788	103	892	88.4
Canadian artists	76	79	154	49.0
Others	713	25	738	96.6
Total revenue ($millions)	1,153	171	1,324	87.1
Total expenses ($millions)	978	157	1,134	86.2
Profit margin[1] (%)	15.2	8.3	14.3	
Total Employment[2]	2,402	975	3,377	71.1

1 Calculated as revenue minus expenses divided by revenue.
2 Includes freelancers.
Total may not add due to rounding.
Source: Statistics Canada, Sound Recording Survey,1998.

Table 3

Record companies by location, 1998

Indicator	Quebec-based companies	Ontario-based companies	British Columbia-based companies	Companies based in other provinces and territories	Total industry
Number of companies	88	113	42	37	280
Number of new releases	997	5,564	68	99	6,728
Canadian artist	300	605	38	80	1,023
Other	697	4,959	30	19	5,705
Total recording sales ($millions)	80	799	x	x	892
Canadian artists	27	114	x	x	154
Others	52	685	x	x	738
Total revenue ($millions)	177	1,111	31	5	1,324
Total expenses ($millions)	160	945	25	5	1,134
Profit margin[1] (%)	9.6	14.9	20.8	7.1	14.3
Total Employment[2]	881	2,257	151	88	3,377

x Confidential to meet secrecy requirements of the Statistics Act.
1 Calculated as revenue minus expenses divided by revenue.
2 Includes freelancers.
Total may not add due to rounding.
Source: Statistics Canada, Sound Recording Survey,1998.

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