



The Daily

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- **Heritage institutions, 1999/2000** 3
Canada's 2,600 heritage institutions rode a wave of expanding memberships, increasing attendance, surging earned revenue and higher government grants in 1999, making it one of their best years ever. Attendance reached 118.3 million visits and operating revenues hit almost \$1.5 billion, up 25% from 1993.

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2001 Census of Agriculture: Profile of farm operators

New data available today from the 2001 Census of Agriculture provide sharper focus to the statistical portrait of Canada's farm operators published in *The Daily* on November 20.

Today's release covers the same variables — numbers of farm operators by age and sex, farm and non-farm work, residence on and off the farm, and injuries — but for smaller geographic areas. These areas, called census consolidated subdivisions, are equivalent to towns and townships, villages, and rural municipalities.

The third release from the 2001 Census of Agriculture will be on November 20, 2003. It will complete the profile with socio-economic characteristics of farm operators, including sex, marital status, mother tongue, highest level of schooling, and net farm income, as well as farm population counts and income profiles for census farm families and households.

Farm operator data for the 2001 Census of Agriculture (full release, plus selected historical farm data) are available on CD-ROM (95F0353XCB, \$295). The next portion of the CD-ROM (95F0354XCB) and Internet subscriptions (95F0302XIE) are now available to current subscribers. The full subscription containing the complete farm and farm operator data releases plus selected historical farm data is \$740 in either format.

For more information, contact Client Services (1-800-465-1991) or Michel McCartin (613-951-1090; michel.mccartin@statcan.ca), Agriculture Division.



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NEW PRODUCTS

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MAJOR RELEASES

Heritage institutions

1999/2000

Canada's 2,600 heritage institutions rode a wave of expanding memberships, increasing attendance, surging earned revenue and higher government grants in 1999, making it one of their best years ever. Attendance reached 118.3 million visits and operating revenues hit almost \$1.5 billion, up 25% from 1993.

A record 118.3 million visitors flocked to the nation's museums, historic sites, nature parks, zoos, botanical gardens and planetariums in 1999, up 4% from 1997.

At the same time, operating revenues reached almost \$1.5 billion, up 12% from 1997. Adjusting for inflation, the increase in revenue was 10%. Operating expenditures rose 10% from 1997 to just over \$1.3 billion.

The source of operating revenue for heritage institutions has shifted gradually from governments to the visiting public.

For every \$100 in revenue in 1999, heritage institutions received roughly \$59 from governments, and \$33 from the public in the form of memberships, admissions and over-the-counter sales. This contrasts with 1993, when \$71 came from governments and only \$23 came from the visiting public.

Private donors accounted for about \$8 out of every \$100 in revenue in 1999, compared with just under \$6 in 1993.

Average admission fees have increased over the years. For example, the average admission fees for adults rose 37% from the early 1990s to \$3.50 in 1999, after controlling for inflation.

Earned operating revenue: Over-the-counter sales drive phenomenal growth

Heritage institutions reported earned operating revenues of more than \$481.5 million in 1999, up 22% from 1997.

Despite a surge in revenue from memberships and admission fees, the driving force in the jump was revenue from over-the-counter sales in gift shops, cafeterias and other outlets. These sales hit almost \$308.5 million in 1999, up 30% from 1997.

In 1999, over-the-counter sales accounted for about 64% of earned revenues; admission fees accounted for 33% and memberships only about 3%.

Heritage institutions have had to become more aggressive at finding alternate sources of revenue

Note to readers

The biennial Survey of Heritage Institutions collects data on not-for-profit heritage institutions in Canada. These data are based on 2,604 institutions reporting for their financial year ending between April 1, 1999 and March 31, 2000, referred to here as 1999.

***Heritage institutions** include museums, historic sites, archives, and other related institutions such as exhibition centres, planetariums and observatories, aquariums and zoos, and botanical gardens, arboreta and conservatories. Data are also available on nature parks that have interpretations and educational programs (e.g., Banff, Jasper, Stanley, Gatineau, Wood Buffalo, Algonquin, and many smaller parks). For-profit institutions are excluded.*

***Earned revenues** include membership, admission and camping fees, gross revenues from gift shops, sales counters, cafeterias or recreational activities; and interest and other revenues.*

***Unearned revenues** include government funding, corporate grants, corporate sponsorships, contributions from "friends of" organizations, university or religious institutions, and donations.*

Unless otherwise stated, revenues are in current dollars.

to offset the slower growth of government grants and subsidies. This has resulted in extensive use of Internet sites, for example, to market their products and services — a strategy which appears to be paying off.

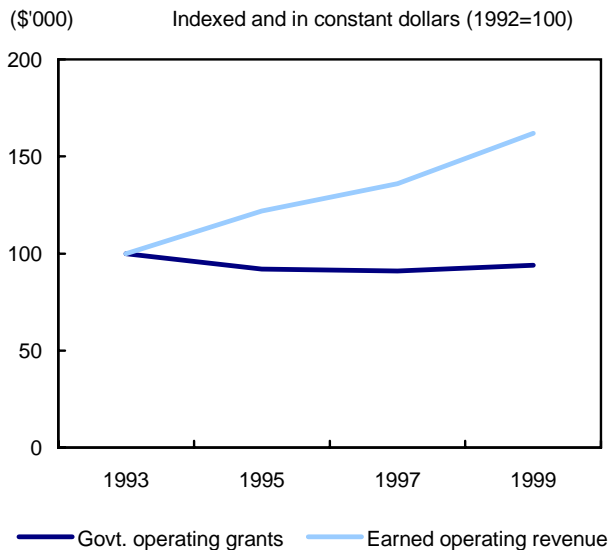
Moderate growth in government grants

Grants and subsidies from all levels of government climbed almost 6% from 1997 to \$862.7 million in 1999. Adjusting for inflation, the increase was 4%. The average grants and subsidies per institution were \$331,300, up 3% from \$322,000 in 1997. This compares with an average of \$362,800 in 1993.

Although government assistance did not grow as much as the earned operating revenue, it was still the largest source of revenue for heritage institutions. In 1999, government operating grants and subsidies represented 59% of the total operating revenue of heritage institutions. This was down from 63% in 1997 and from 71% in 1993.

The greatest challenge facing heritage institutions, however, may not be the slower growth of government assistance but the continued decline in the number of volunteer workers. In 1993, heritage institutions had 59,320 volunteers in their workforce. By 1999, this number had dropped to 49,000. The decline was more evident at museums, where volunteers dropped to 28,000 in 1999 from 38,400 in 1993.

Government operating grants and earned operating revenue



According to the National Survey of Giving, Volunteering and Participation, the actual number of hours offered by volunteers increased in 1999. This reliance on fewer volunteers working more hours may help reduce the impact of the drop in the number of volunteers on the operations of heritage institutions.

Museum attendance up slightly

Museums are one of the most popular types of heritage institutions. Attendance at museums rose slightly to 26.5 million visits from 26.2 million in 1997. Even so, average attendance dropped slightly to 18,900 per institution from 19,100 in 1997. Museum attendance has fluctuated between 26 and 27 million since the mid-1990s, remaining below the peak of 26.9 million recorded in 1995.

In contrast, historic sites saw a 4% increase in attendance. At nature parks, the number of visitors rose 3%, and visits to other institutions, primarily zoos, aquariums, botanical gardens and exhibition centres climbed 13%.

Museum visitors spent more for their pleasure than in 1997, as earned revenue reached \$211.3 million in 1999, 23% higher than in 1997.

Admission fees at museums have risen over the years, with the average fees for adults rising 12% from 1997. Adjusting for inflation, the increase was 9%.

In 1999, a third of the operating revenue of museums came from membership dues, admission

fees, gift shops, concessions and other commercial ventures. This compares with less than a quarter at the beginning of the decade. The pattern was the same with historical sites, where 31% of revenue in 1999 came from these sources, compared with 20% at the beginning of the decade.

Although other institutions such as exhibition centres, aquariums, zoos, and botanical gardens (combined, excluding nature parks) showed a similar pattern, the level of commercial activities was higher, from nearly 40% at the beginning of the decade to almost half of their total operating revenue in 1999. Even at archives, where government support was heaviest, commercial activities accounted for 3% of the operating revenue, triple what it was earlier in the decade.

Marketing efforts, such as catalogues and the sale of products from websites, have been instrumental to the improvement of earnings by museums.

Small heritage institutions improving financially

Small heritage institutions with annual revenue of less than \$100,000 experienced hard times in the mid-1990s because of the decline in their government grants, but are now seeing some improvement in their financial status.

These institutions reduced their deficit to less than 1% of total operating revenue, compared with 18% in 1997. Government grants increased 9% from 1997 and private sector donations jumped 25%. In addition, earned revenue, mainly from admissions and sales counters, improved 4%.

Medium-sized heritage institutions (revenue of \$100,000 to less than \$1,000,000) and large institutions (\$1,000,000 and over) did well financially. Although their reported surplus remained stable at 4% of total operating revenue, the same as in 1997, they made double-digit gains in total revenue. This was because their earned revenue rose 21%. Also, government grants to these institutions were 18% higher for the medium-sized institutions and 7% higher for the large institutions than in 1997.

Across Canada, the increase in earned revenue was most evident for institutions in Newfoundland and Labrador, Nova Scotia and British Columbia. Earned revenue declined in the Northwest Territories.

Nature parks: steady increases in earned revenue

Nature parks in Canada reported record earnings, mostly from admissions and sales at the counters. Earned revenue reached \$127.3 million in 1999 averaging \$758,000 per institution, up from

\$611,000 per institution in 1997. Earned revenue's share of total operating revenue for nature parks climbed to 38% from 35% in 1997.

Led by the federal government, the various level of government increased their financial support of nature parks to \$207.5 million in 1999, averaging \$1,235,000 per institution compared with \$1,109,000 in 1997.

Information on methods and data quality available in the Integrated Meta Data Base: survey number 3107.

Data tables are available in the publication *Heritage institutions* (87F0002XPE, \$50). Data from the survey

are also available by province and territory. Researchers can request special tabulations on a cost-recovery basis. See *How to order products*.

For general information or to order special or standard tables, contact Client Services (1-800-307-3382; cult.tourstats@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Fidel Ifedi (613-951-1569; fax: 613-951-1333; fidel.ifedi@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

Attendance, operating revenue, and operating expenditures

	1993	1995	1997	1999	1997 to 1999 % change
Total					
Attendance ('000)	109,856	112,965	114,064	118,259	3.7
Operating revenues (\$'000)	1,167,783	1,220,389	1,295,948	1,453,777	12.2
Operating expenditures (\$'000)	1,065,793	1,166,858	1,215,523	1,334,203	9.8
Heritage institutions excluding nature parks					
Attendance ('000)	54,928	54,482	53,825	56,299	4.6
Operating revenues (\$'000)	869,947	959,045	1,013,018	1,116,576	10.2
Operating expenditures (\$'000)	844,016	932,696	978,707	1,073,331	9.7
Museums					
Attendance ('000)	25,444	26,868	26,173	26,514	1.3
Operating revenues (\$'000)	506,738	576,523	595,148	647,496	8.8
Operating expenditures (\$'000)	497,767	565,168	578,798	632,132	9.2
Historic sites					
Attendance ('000)	17,020	16,535	16,073	16,659	3.6
Operating revenues (\$'000)	131,015	128,788	136,782	159,108	16.3
Operating expenditures (\$'000)	120,710	121,196	127,288	142,039	11.6
Other Institutions¹					
Attendance ('000)	12,464	11,079	11,578	13,122	13.3
Operating revenues (\$'000)	232,194	253,732	281,083	309,971	10.3
Operating expenditures (\$'000)	225,539	246,332	272,620	295,160	8.3
Nature Parks					
Attendance ('000)	56,307	58,483	60,239	61,960	2.9
Operating revenues (\$'000)	297,836	261,344	282,930	337,201	19.2
Operating expenditures (\$'000)	221,777	234,162	236,816	260,872	10.2

¹ Includes archives, exhibition centres, planetariums, aquariums, zoos, botanical gardens, arboreturns, and conservatories.

Earned operating revenue

	1993	1995	1997	1999	1997 to 1999
	\$'000				% change
Total					
Membership	8,224	10,060	11,114	12,623	13.6
Admission	98,961	129,242	144,201	160,430	11.3
Sales counters, giftshops, and other	162,435	206,878	237,935	308,449	29.6
Total	269,620	346,180	393,250	481,502	22.4
Heritage institutions excluding nature parks					
Membership	7,963	9,721	10,846	12,374	14.1
Admission	75,967	91,163	106,081	114,748	8.2
Sales counters, giftshops, and other	111,476	158,169	176,791	227,097	28.5
Total	195,407	259,053	293,718	354,219	20.6
Museums					
Membership	5,419	6,614	7,272	8,892	22.3
Admission	38,120	47,030	53,042	49,324	-7.0
Sales counters, giftshops, and other	73,961	105,643	111,136	153,035	37.7
Total	117,500	159,287	171,450	211,251	23.2
Historic sites					
Membership	217	260	245	354	44.6
Admission	11,352	15,076	15,480	22,567	45.8
Sales counters, giftshops, and other	16,570	20,111	25,510	26,929	5.6
Total	28,139	35,447	41,235	49,850	20.9
Other institutions¹					
Membership	2,327	2,847	3,329	3,129	-6.0
Admission	26,495	29,057	37,560	42,857	14.1
Sales counters, giftshops, and other	20,946	32,415	40,144	47,133	17.4
Total	49,768	64,319	81,033	93,119	14.9
Nature parks					
Membership	260	339	268	249	-7.1
Admission	22,995	38,079	38,120	45,682	19.8
Sales counters, giftshops, and other	50,958	48,709	61,144	81,352	33.0
Total	74,213	87,127	99,532	127,283	27.9

¹ Includes archives, exhibition centres, planetariums, aquariums, zoos, botanical gardens, arboretums, and conservatories.

Operating grants and donations

	1993	1995	1997	1999	1997 to 1999
	\$'000				% change
Total					
Federal	337,675	334,714	341,058	373,419	9.5
Provincial	311,551	287,352	274,473	288,663	5.2
Municipal	181,942	175,591	195,918	200,606	2.4
Total government	831,168	797,657	811,449	862,688	6.3
Private	66,995	76,552	91,249	109,588	20.1
Heritage institutions excluding nature parks					
Federal	233,627	252,358	259,653	268,987	3.6
Provincial	253,039	252,748	239,313	253,510	5.9
Municipal	121,605	120,221	131,719	132,711	0.8
Total government	608,271	625,328	630,685	655,208	3.9
Private	66,270	74,664	88,616	107,149	20.9
Museums					
Federal	117,353	138,201	136,425	142,517	4.5
Provincial	180,300	173,910	159,545	171,671	7.6
Municipal	50,732	56,013	67,376	59,194	-12.1
Total government	348,386	368,124	363,346	373,382	2.8
Private	40,852	49,112	60,352	62,862	4.2
Historic sites					
Federal	56,379	51,424	54,811	59,475	8.5
Provincial	30,291	25,585	23,190	28,414	22.5
Municipal	14,532	13,503	14,388	16,333	13.5
Total government	101,202	90,512	92,389	104,222	
Private	1,674	2,828	3,158	5,036	59.5
Other institutions¹					
Federal	59,895	62,733	68,416	67,044	-2.0
Provincial	42,448	53,252	56,578	53,425	-5.6
Municipal	56,340	50,706	49,955	57,183	14.5
Total government	158,683	166,691	174,949	177,652	1.5
Private	23,744	22,724	25,106	39,250	56.3
Nature parks					
Federal	104,048	82,355	81,405	104,432	28.3
Provincial	58,512	34,604	35,160	35,153	0.0
Municipal	60,337	55,370	64,200	67,895	5.8
Total government	222,897	172,329	180,765	207,480	14.8
Private	726	1,888	2,633	2,439	-7.4

¹ Includes archives, exhibition centres, planetariums, aquariums, zoos, botanical gardens, arboretums, and conservatories.

OTHER RELEASES

Recovery in the airline industry after September 11, 2001

January 1997 to July 2002

Commercial airline activities have yet to recover fully from the impact of last year's events in New York and Washington, according to a new study.

The research paper *How much did the airline industry recover since September 11, 2001?* analyses the impact of the events of September 11 on airline activities in the three main commercial sectors: domestic, transborder and international.

Airline activities in Canada were already experiencing a significant downturn before September 2001. The negative trend observed since mid-1999 in commercial aircraft movements in Canada deteriorated further after September 2001. As of July 2002, major airports in Canada had yet to see their volume of domestic commercial flights recover this lost ground.

This report found that to return to a positive trend, activity in the domestic sector would have to increase between 5% and 10% on a year-over-year basis. The international sector is somewhat closer to a positive trend; activity in this sector would have to increase less than 5%. On the other hand, the transborder sector, that is, flights between Canada and the United States, would have to increase more than 10% to return to a positive trend.

In total, Canadian airports with Nav Canada control towers have handled on average more than 5 million aircraft movements annually during the last few years. Of these, close to 3 million or 60% were commercial movements involving scheduled and charter flights. Private/government, military and local (mostly flying training) movements accounted for the remainder.

The report *How much did the airline industry recover since September 11, 2001?* (51F0009XIE, free) will be available soon on Statistics Canada's website (www.statcan.ca). From the *Our products and services* page, under *Browse our Internet publications*, choose *Free*, then *Transport and warehousing*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Robert Masse (613-951-8699), Transportation Division. ■

Canada Customs and Revenue Agency Employee Survey

2002

Data from the Canada Customs and Revenue Agency Employee Survey are now available.

For more information, contact the survey information line (1-866-337-3360) or Client Services (1-888-297-7355; 613-951-7355; fax: 613-951-3012; ssd@statcan.ca), Special Surveys Division. ■

NEW PRODUCTS

Gross domestic product by industry,
September 2002, Vol. 16, no. 9
Catalogue number 15-001-XIE (\$11/\$110).

**Agriculture and rural working paper
series, 1981–1996, no. 60**
Catalogue number 21-601-MIE
(free).

Restaurant, caterer and tavern statistics,
September 2002, Vol. 34, no. 9
Catalogue number 63-011-XIE (\$6/\$55).

**Labour interview questionnaire —
January 2001 Survey of Labour and Income
Dynamics, 2001**
Catalogue number 75F0002MIE2002002
(free).

**Preliminary interview questionnaire —
January 2001 Survey of Labour and Income
Dynamics, 2001**
Catalogue number 75F0002MIE2002003
(free).

**Entry exit component for labour interview —
January 2001 Survey of Labour and Income
Dynamics, 2001**
Catalogue number 75F0002MIE2002004
(free).

Heritage institutions, 1999–2000
Catalogue number 87F0002XPE (\$50).

**Farm operator data (full release) and selected
historical data for the 2001 Census of Agriculture**
Catalogue number 95F0353XCB (\$295).

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
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MAJOR RELEASES	
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• Productivity, hourly compensation and unit labour cost, 1996 Growth in productivity among Canadian businesses was modestly weak again in 1996, accompanied by sluggish gains in employment and slow economic growth during the year.	4
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