FOCUS ON
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Electronic Media Play a Major Role in Canadians' Lives

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Most Canadians would find it hard to imagine a world without radio and television. Many cannot even remember the days before electronic media. Today, over 95% of Canadians watch at least some television each week and almost as many listen to the radio. Combined, the two media command our attention an average of over six hours a day. We spend a quarter of our lifetime either listening to the radio or watching television.

Switching on the Radio

Stations playing Adult-Contemporary, Gold, or Middle-of-the-Road music capture almost half of our listening time. As might be expected, not all stations attract the same type of listener. The Album-Oriented-Rock and Contemporary stations draw most of their audiences from the under-35 age group, while others such as Country, the CBC and Easy-Listening tend to appeal to those over 35.

The Radio-listening Data Bank, which provided this information, can also provide breakdowns by education and occupation. For example, radio listening increases with education, up to the completion of high school or community college and then declines for Canadians with at least some university education. In 1987, high school graduates averaged 21.7 hours of radio listening per week, while university graduates reported 17.3 hours.

In the early days of radio much of the music was broadcast live, often from major ballrooms on the continent; today, nearly all the music aired comes from recordings. The recording industry might well have developed quite differently had radio not become such a popular medium. Radio remains the principal means of exposure for new recordings and this, in turn, provides essential support for the work of many songwriters and performers.

Data from the Sound Recording Survey provide some insight into this industry. Using the musical category information, the distribution of the new releases in 1987-88 can be compared to the distribution of radio listening by station format. Although the category definitions are not identical, the similarities between the two pie charts are apparent (see Figure 1 on page 2).

Minimum Canadian content regulations for the recordings played on the radio have been established by the Canadian Radio-television and Telecommunications Commission (CRTC) to provide a healthy market for Canadian artists and songwriters. Of the 1,431 singles released by record label companies established in Canada in 1987-88, 38% were classified as having Canadian content according to CRTC criteria. For albums,14% of the 2,940 releases had Canadian content. A musical selection is considered a Canadian content selection if it qualifies under any two of the following conditions:

(a) the instrumentation or lyrics were principally performed by a Canadian;

(b) the music was composed by a Canadian;

(c) the lyrics were written by a Canadian;

(d) the live performance was wholly recorded in Canada.

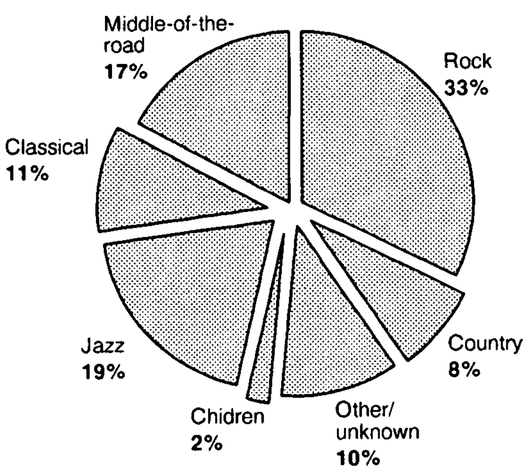
Continued p. 2

Figure I

Comparison of Releases by Sound Recording Industry and Radio Listening Habits of Canadian Population

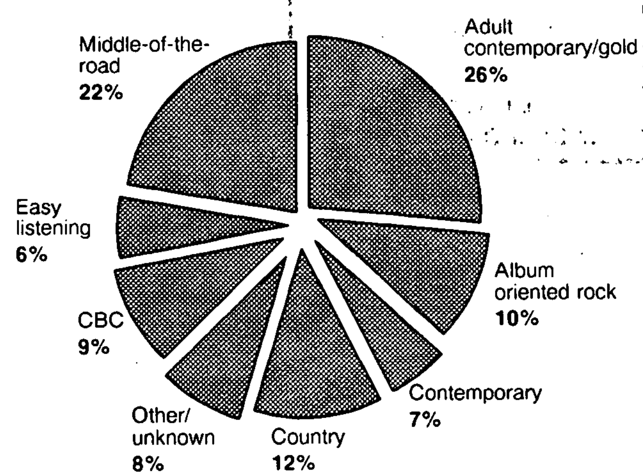
Sound recording

New album[1] releases by musical category, 1987-1988



Radio listening

Radio tuning by station format – Total population age 7 + Fall 1987



[1] *A recording released in album, tape and/or compact disc formats is counted as an album.*

These regulations have also been of benefit to Canadian-owned recording companies, which release the bulk of Canadian recordings. Financial data from the survey show that 63% of sales of Canadian recordings can be attributed to Canadian-owned companies.

Two relatively new phenomena in the music business are the compact disc and the music video. In one year, 1987-88, CDs doubled their share of the Canadian market to 22% of sales by record label companies established in Canada; most of the gain came at the expense of vinyl albums. The number of Canadian music videos produced almost doubled from 50 in 1984-85 to 92 in 1987-88, the latest year for which data are available. For anyone who has watched much television, news of the proliferation of Canadian music videos will come as no surprise.

Turning on the TV

What we watch most on television are drama and comedy. According to the Television-viewing Data Bank (Fall 1987) almost half of all Canadian viewing falls into these two categories, with news accounting for a further 20%. Although some might think sports viewing is the main reason for owning a TV, only 6% of viewing is recorded in this category.

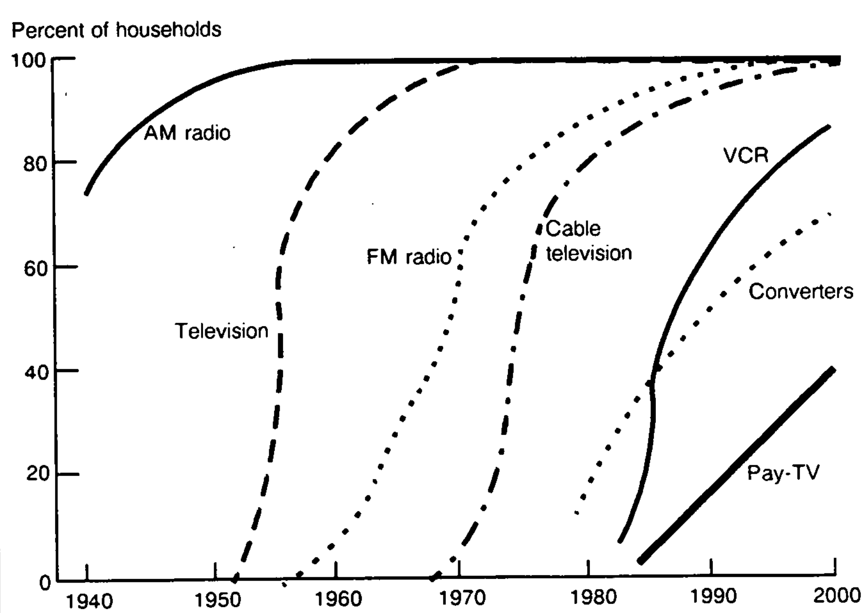
Non-Canadian drama and comedy programs are much more popular than the home-grown variety; nine of every ten hours of viewing consists of foreign programming.

The data bank can also provide information on the language of programs or the language of the viewer, on the location or affiliation of the station, as well as on viewer age, sex, education or occupation. For

Continued p.3

Figure II

Growth in the Penetration of Viewing and Listening Equipment



Source: ***Report of the Task Force on Broadcasting Policy, 1986.***
(projections for 1985 on)

example, women watch more TV than men and persons over the age of 50 watch more than those under 50. Even though some parents may think their teenagers are addicted to TV, teens actually watch less TV than nearly any other group, 19.2 hours per week.

Television, like many other things, is not what it used to be. The introduction of pay-TV in 1983 and the popularity of VCRs have begun to change our viewing habits. The proliferation of video stores is testimony to some of the changes taking place. Figure II shows that these latest innovations are moving into the marketplace at a rate as rapid as that of their predecessors. Pay-TV and VCRs already account for more than 6% of total television viewing. In actual time this amounts to the equivalent of about one feature film per week.

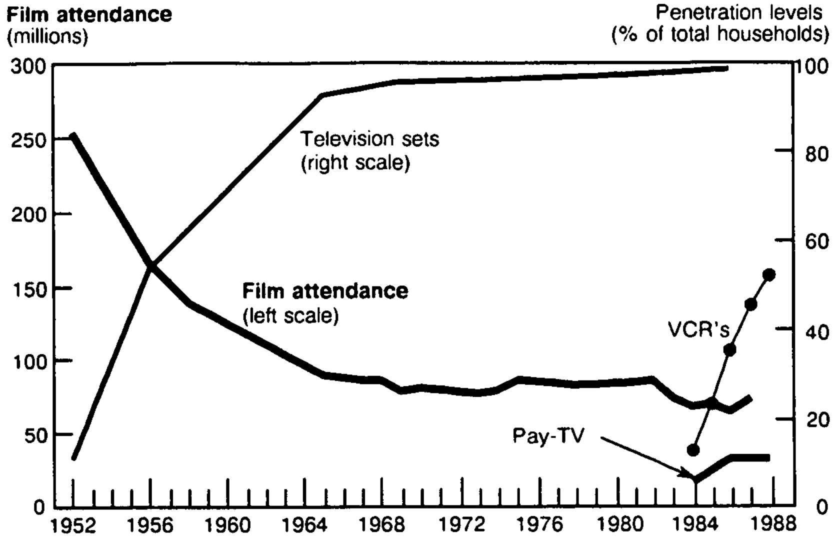
The effect of these changes has also been felt in the Canadian film exhibition sector. In 1986-87 regular and drive-in theatres had fewer than 72 million paid admissions, less than 30% of the 1952 movie attendance peak of 256 million visits. The number of times the average Canadian attends the movies has dropped from 18 times a year in 1952 to just 3 times a year in 1986-87.

While theatres have generally been able to compensate for declining attendance by raising ticket prices, receipts peaked in 1982 at $354 million and declined each year thereafter. In 1986-87 movie theatres took in $305 million at the box office.

This erosion of the theatrical exhibition market began well before 1982; the effect of the introduction of television itself can be seen in the earlier years of the decline. Figure III reveals a sharp drop in movie attendance from 1952 to 1963, the period of television's phenomenal growth. After stabilizing for the next 20 years or so, attendance levels began to wane with the growth in ownership of VCRs and Pay-TV in the early eighties. With VCRs becoming more commonplace, it is likely that the theatrical movie exhibition market will continue to erode.

Figure III

Film Attendance and Domestic Audio-Visual Equipment Penetration Levels, 1952-1986



Sources: ***Household Facilities and Equipment****, Statistics Canada catalogue 64-202, various issues.*
Film Industry, Preliminary Statistics*, Statistics Canada catalogue 87-204 1985-86 and unpublished data.*
Motion Picture Theatres and Film Distributors*, Statistics Canada catalogue 63-207, various issues.*

In the beginning, the film production industry saw television as the enemy and wanted nothing to do with it, but it soon discovered that TV represented a new source of revenue from the production of TV programs and commercials. Data from our Film and Video Production Survey show that television, including sales of TV commercials to advertising agencies, generated 55% of the total 1987-88 revenue of film production companies of $373 million.

Television is also the largest single market for film distributors. In 1987-88, it generated $228 million in sales by distributors to broadcasters and advertising agencies. Videocassette distribution and wholesaling provided a further $213 million, while sales to the theatrical market, at $149 million, fell below the value of the television sector for the third year in a row.

Radio and television are playing an important role in the changing patterns of our leisure-time activities. In that capacity they also play an increasingly important role as carriers of the products of other allied industries. The data from four related projects of the Culture Statistics Program - Radio, Recording, Film and Television - have been used to show the relationship between radio, television and other allied industries.

This article is an example of the way in which the data from the CSP can be combined to produce a more complete understanding of culture in Canada. This type of analysis can be extended to include other CSP surveys as well as surveys from other areas of Statistics Canada and other reliable sources outside the Bureau. Readers wishing to obtain further information are encouraged to contact us. ☐

So Much Data, So Little Time...

by Renée Langlois, Data Integration Analyst

What does an integrated database mean to you? The feature article of this issue ("Electronic Media Play a Major Role in Canadians' Lives") is a good example of how data from different sources can be pulled together to create an interesting analysis of a particular cultural sector. In that example, data from seven independent databases were accessed going back a number of years to identify trends in the media industries and in the consumption patterns of Canadians. These databases were located in three different Statistics Canada divisions, and in the case of film attendance, held data from 34 annual surveys. The task of identifying the right sources for the data and of collating all the various items is time-consuming to say the least.

Herein lies the attraction of an integrated database to researchers. An integrated database gathers recent and trend data from a variety of sources, and displays them in a central and coordinated framework. The Culture Statistics Program is setting up an integrated database which will include data from the Program's surveys, supported by data from Statistics Canada's social, economic and demographic surveys.

The Culture Statistics Program's surveys cover a variety of areas of Canadian culture, from creator of a cultural good to producer, distributor and consumer. The Program completes its databases by accessing other Statistics Canada databases such as the Census of Population, the Census of Manufactures, and Consumer Income and Expenditures, to name a few. These databases help to provide related, relevant information which adds depth to the Culture Statistics Program's scope. For example, an examination of the results of the 1981 and 1986 Censuses of Population indicates that the number of Canadians identifying themselves as performing and audio-visual artists has increased by 20%. Within this segment of the population, the largest increase occurred in the field of dance, with the number of declared dancers and choreographers rising by 46%. Further research with the help of the Culture Statistics Program's Performing Arts Survey reveals that the number of dance troupes reporting during those same five years rose by 77%. While some of this increase can be attributed to expanded coverage of the Performing Arts Survey, these two increases taken together indicate a definite growth in the discipline of dance. Other areas of research include attendance figures related to dance performances, expenditures and revenues of dance companies and a general comparison to other performing arts disciplines.

The Culture Statistics Program's integrated database will present information at the provincial level to facilitate the elaboration of profiles of culture in Canada's regions. The content of the database is along the following lines:

* Demographic data will profile the population by age, sex and marital status, and provide figures on immigration, ethnicity, language and education by province.

* Economic/financial data will provide inflation rates, GDP changes, basic output figures for various industry groups, by province.

* Employment data will show employment and unemployment rates by province, and employment in designated cultural occupations taken from Censuses of Population.

* Data on consumers will be accessed from a variety of Statistics Canada sources, to offer figures on revenue and expenditures of consumers, expenditures on cultural goods and services, and time spent on cultural activities compared to other activities.

* Data on cultural industries will provide basic indicators related to the book publishing, periodical publishing, film and video, radio and television, recording and performing arts industries. Basic indicators are being identified through consultation with policy makers and data users from the private and public sectors.

* Data on cultural institutions, including heritage institutions (museums, art galleries, etc.) and public libraries, will provide basic indicators (again, to be agreed upon through consultation) such as attendance, funding, revenues and expenditures.

* Data on creative and performing artists will look at full-and part-time workers in the arts and culture field, income from artistic and other occupations, education and training, and sources of employment.

* Government expenditures on arts and culture will examine data on levels of spending by the federal, provincial and municipal governments for such things as grants, operating and capital funds and loans.

* The economic impact of arts and culture will provide data from an input/output model developed in 1986, looking at such items as contribution of culture to GDP, employment generated, investment and import leakages.

* International trade data will focus on imports and exports of goods and services, as well as monetary transfers.

Creating such a database requires thought, effort and consultation with those users who will most benefit

Continued p.5

from coordinated sets of data. Provincial government departments responsible for culture have been consulted and expressed a keen interest in integrating data since they conduct cultural research and are confronted with a multitude of data sources besides Statistics Canada. Other users of culture statistics may also be interested in this endeavour. Any comments should be directed to Renée Langlois. □

Libraries: Books and More

Donna Owens, Former Public Libraries Project Manager

In a game of word association, if someone says "library", the first thought to pop into your mind may well be "book". And if you are a librarian, the following thought may be "dollars".

In 1987, Canada's public libraries held 57.4 million volumes of books, a small increase of 1% over 1986. Library acquisitions of print material were virtually unchanged from 1986 at 3.9 million volumes. This translates into 1 book purchased for every 6.5 Canadians, the same ratio as in 1983. In both 1986 and 1987, the ratio of acquisitions to holdings of print materials was 6%.

In contrast there has been a rapid growth in "non-traditional" materials, such as talking books, videotapes, and compact discs (CDs). From 1983 to 1987, while book holdings increased by not quite 11%, holdings of talking books increased by 57% and of video materials by 129%. In 1987 alone, talking books and videos grew by 8% and 55% respectively.

Now getting back to that second thought: in 1987, public libraries spent $57 million buying books to stock their shelves, or about $2.25 for each Canadian. Books accounted for 75% of the total dollars spent on library materials in 1987, and 77% in 1986. An additional $19 million was spent on"other" library materials and, of that figure, $7 million was spent on micro- and audio-visual materials. These last items accounted for 9.7% of the 1987 materials budget, and 8.9% in 1986.

Although books do still make up the bulk of library holdings and material expenditures, in future games of word association, perhaps it will not be "book" that first pops into your mind as a response to "library", but rather"video" or "CD".

Readers wishing more information should contact Thomas Fitzpatrick, Public Libraries Project Manager, (613) 951-1562. □

Focus on Data

Weekly television viewing, fall 1988:	23.5 hours per person
Weekly radio listening, fall 1988:	18.5 hours per person
Motion picture attendance, 1987-88:	85 million
Feature length films produced, 1987-88:	142
Feature length films distributed in the theatrical market, 1987-88:	833
New recordings released, 1987-88:	2,883
Books published, 1987-88:	7,263
Annual circulation of periodicals, 1987-88:	512 million copies
Performances by performing arts companies, 1987:	36,200
Attendance at heritage institutions, 1986-87:	53.2 million
Lending by public libraries, 1987:	174 million items
Cultural spending by governments, 1987-88:	$4.9 billion

New Publications

87-202 Sound Recording 1987-88

87-210 Book Publishing in Canada, 1987-88

87-517 Government Expenditures on Culture in Canada, 1982-83 to 1986-87

New Service Bulletin

87-001 Vol. 12, No. 4 An Overview of the Book Publishing and Exclusive Agency Market in Canada, 1981-82 to 1986-87

Coming Soon...

87-205 Public Libraries in Canada, 1987

87-206 Government Expenditures on Culture in Canada, 1987-88

87-001 Vol. 12, No. 5 Government Expenditures on Culture in Canada, 1987-88

Still Available

87-203 Periodical Publishing, 1986-87

87-204 Film Industry, 1985-86

87-205 Public Libraries in Canada, 1985, 1986

87-205S Public Libraries in Canada, 1982 to 1984

87-206 Government Expenditures on Culture, 1986-87

87-207 Heritage Institutions, 1985-86

87-208 Television Viewing in Canada, 1987

87-209 Performing Arts, 1987

87-001 Vol. 12, No. 1 Periodical Publishing, 1986-87

87-001 Vol. 12, No. 2 Sound Recording Industry, 1982-83 to 1986-87

87-001 Vol. 12, No. 3 Heritage Institutions, 1985-86

A Statistical View of the Canadian Zoo

by Erika Dugas, Heritage Institutions Project Manager

Zoos in Canada were busy places in 1986-87. The 17 non-profit zoos reporting to our survey of heritage institutions attracted over 6 million visitors, or almost one visitor for every four Canadians. Three-quarters of the visitors went to the zoo during the peak tourist time of May through September. In a typical summer week, zoos stayed open over 10 hours per day, 75 hours per week on average. This compared to a 58 hour week during the remaining reporting period. Ten of the zoos indicated that they remained open year round; the other seven were open between 13 and 26 weeks a year.

If group attendance is any indication of visiting patterns, zoos are particularly exciting attractions for school children. While nearly half of the zoos do not keep counts on the number of school groups visiting, the other half alone reported over 5,100 visiting school groups, twice the number of non-school groups.

With all these millions of visitors, did "non-profit" zoos generate a surplus? The average operating revenues of the zoos reporting in the survey were just over $2.2 million dollars while the average operating expenditures were $2.1 million - in other words, an average operating surplus of almost $150,000 per zoo.

In total, $36 million in operating revenues were reported by these zoos. Of this amount, 46% were earned revenues. Admission fees account for the bulk, or $11 million, of the total earned revenues of $17 million. The average admission fee for adults was about $3.25, with fees ranging from under $2.00 to over $6.00. The average fees for children and senior citizens were much lower at $1 and $2 respectively. While 75% of the zoos charged admission fees, two thirds had no membership programs; revenues from this source thus accounted for a very small percentage of the total operating revenues.

Even with the financial support generated by millions of paid visits and souvenir or boutique sales, government subsidies remained a necessity. Fifty-three per cent of total zoo operating revenues, or $19 million, came from government sources. Municipal and provincial monies were the leading sources of funding, with municipal funding exceeding $16 million and provincial amounting to over $2 million. Federal funding represented less than $100,000, with the majority of this funding channelled through programs of Employment and Immigration Canada.

Zoos are complex operations. Facility maintenance, security, general administration, food services, and interpretation require a diverse labour force. The zoos in this survey employed over 540 full-time staff, about 740 part-time workers, and had approximately 330 volunteers contributing their time and services. In 1986-87, these zoos spent $21 million on wages, salaries and contract fees - about three fifths of their total operating expenditures of $34 million. □

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