



# CULTURE

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## A Look Behind the Growth in Canadian Book Publishing Exports

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While Canadian book publishers<sup>1</sup> faced a relatively flat domestic market from 1991-92 to 1994-95<sup>2</sup> with a revenue growth from sales of own titles of 13%, the export market (excluding sale of subsidiary rights<sup>3</sup>) jumped 166% over the same period.

**Table 1**  
Revenue generation increasingly dependent on international markets

|                           | 1991-92 | 1992-93 | 1993-94 | 1994-95 | 3 year % change |
|---------------------------|---------|---------|---------|---------|-----------------|
| Domestic revenue (\$'000) |         |         |         |         |                 |
| Own titles                | 581,727 | 598,350 | 606,003 | 655,922 | 13              |
| Export revenue (\$'000)   |         |         |         |         |                 |
| Own titles                | 41,752  | 62,076  | 101,701 | 111,053 | 166             |
| Exports as % of total     | 7%      | 9%      | 14%     | 14%     |                 |

### Book export market became increasingly concentrated until 1994-95

While a greater number of publishers reported revenue from exports (79% of the 326 publishers in 1994-95, versus 72% to 74% from 1991-92 to 1993-94), export activity was concentrated, with the top three publishers earning over half of the 1994-95 export revenue. In contrast, the top three domestic revenue earners from own titles sales comprised a smaller one quarter of total domestic sales in 1994-95.

The data indicate, however, that the level of export concentration may be diminishing. Although export revenue became increasingly concentrated from 1991-92 to

1993-94, this trend slowed somewhat in 1994-95 (Table 2). The top three exporters continued to have export revenue growth but their rate of increase slowed markedly to 3%, resulting in a lower market share. The "other" exporters on the other hand, which range from large publishers to small not-for-profit volunteer operations, had an 18% growth in export revenue in 1994-95. The recent decline in concentration was a result of the growth in the total number of publishers accessing foreign distribution channels, as well as export revenue growth for those publishers already exporting. The smallest publishers (revenues of less than \$250,000) were drawing as much as 12% of their total revenue in 1994-95 from exports.

**Table 2**  
Increase in total export revenue for Canada's three largest exporters slows in 1994-95

| Export revenue                | 1991-92 | 1992-93 | 1993-94 | 1994-95 |
|-------------------------------|---------|---------|---------|---------|
| Top three exporters \$000,000 | 13.2    | 27.0    | 57.7    | 59.2    |
| % change from previous year   |         | 66%     | 114%    | 3%      |
| Other exporters \$000,000     | 28.5    | 35.9    | 44.0    | 51.8    |
| % change from previous year   |         | 26%     | 23%     | 18%     |
| % of total export revenue     |         |         |         |         |
| Top three exporters           | 32      | 43      | 57      | 53      |
| Other exporters               | 68      | 57      | 43      | 47      |

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<sup>1</sup> This analysis looks at publishers' exports of titles which are produced in Canada. This constitutes 89% of all export revenues. The remaining 11% are exclusive agency export sales for both foreign and Canadian publishers.

<sup>2</sup> The 1991-92 to 1994-95 time period was used here, as 1991-92 to 1992-93 marked the transition point when export revenue grew sizeably, and concentration became evident.

<sup>3</sup> The total amount of revenue from the sale of subsidiary rights ranged from \$6.7 million in 1991-92 to \$5.6 million in 1993-94.

### Quebec is the hotbed of export activity, but with high concentration

Quebec publishers accounted for two thirds of Canada's book publishing export revenue in 1994-95, up from 45% in 1991-92. Quebec's dominance of exports is not, however, because it has the largest companies that generally dominate all facets of Canada's book publishing industry. Rather, Quebec's two thirds export share in 1994-95 is almost double its share for domestic own title sales (38%).

Concentration was very strong in Quebec as three publishers earned four fifths of Quebec's export revenue. On the other hand, the three largest exporting publishers outside of Quebec earned just over one quarter of all export revenues outside of the province.

### Export sales in other languages are booming

From \$2.6 million in export revenues in 1991-92, sales of own titles in languages other than English or French ballooned to \$28.5 million in 1994-95. The share of total export sales of these other language books rose from 6% to 26% over this three year period, surpassing export sales of French-language books. While export sales for all three language groups generally rose each year from 1991-92 to 1994-95, the rise for other languages is especially encouraging in light of global competitiveness, reflecting a responsiveness to demand for books in languages such as Spanish, Chinese and German. Yet once again, just three publishers dominate this market niche, having 98.7% of other language export revenues.

### Tradebooks dominate the export market

Tradebook exporters earned 77% of total export revenues in 1994-95 compared with 10% for textbooks and 13% for "other" books (scholarly, reference and professional/technical). Tradebook export sales also grew the most, by 229% between 1991-92 and 1994-95, followed by "other" books, and then textbooks. Given domestic control over curriculum and professional standards, lower export growth for these latter two categories of books is not surprising. However, tradebook export growth was mostly a function of growth in this area by the three largest exporters. They increased their tradebook export sales from \$13.2 million in 1991-92 (51% of total) to \$58.0 million in 1994-95 (68%).

**Table 3**  
**Export revenue by commercial category of own titles shows some dramatic growth**

|                              | 1991-92<br>(\$'000) | 1994-95<br>(\$'000) | %<br>Change |
|------------------------------|---------------------|---------------------|-------------|
| <b>Textbooks</b>             | <b>7,516</b>        | <b>10,809</b>       | <b>44</b>   |
| - ELHI                       | 5,512               | 7,051               | 28          |
| - Postsecondary              | 2,004               | 3,758               | 88          |
| <b>Tradebooks</b>            | <b>25,873</b>       | <b>85,111</b>       | <b>229</b>  |
| - Mass market                | 109                 | 3,337               | 2961        |
| - Trade paperback            | 15,062              | 35,704              | 137         |
| - Trade hardcover            | 10,703              | 46,070              | 330         |
| <b>Other</b>                 | <b>8,363</b>        | <b>15,133</b>       | <b>81</b>   |
| - Scholarly                  | 2,179               | 4,031               | 85          |
| - General reference          | 2,049               | 3,469               | 69          |
| - Professional and technical | 4,134               | 7,633               | 85          |
| <b>Total</b>                 | <b>41,752</b>       | <b>111,053</b>      | <b>166</b>  |

Although mass market paperbacks comprised just 4% of tradebook export sales in 1994-95, they grew by thirty fold from 1991-92. Trade hardcovers comprised 54% of 1994-95 sales, and also grew by an impressive rate, while trade paperbacks had the remaining 42% of the market in 1994-95.

### Canadian-authored tradebook exports have grown, but their share has fallen

Canadian authors such as Robertson Davies, Carol Shields, Mordecai Richler and Margaret Atwood have garnered much critical and commercial success this decade. This is reflected in the rise in tradebook export revenue earned by Canadian authors (from \$17.4 million in 1991-92 to \$53.6 million in 1994-95). Yet Canadian authors' share of tradebook export revenue fell from 67% in 1991-92 to 59% in 1993-94, then rebounded somewhat to 63% in 1994-95.

### Foreign publishers are not exporters

Although foreign publishers earned 37% of domestic revenue from own titles sales, they garnered just 4% of own title export revenue. Most foreign publishers that set up operations in Canada do so to access the Canadian marketplace, rather than to export from Canada.

### Summary - Export growth strong but slowing down?

After two years of dramatic increases, export revenue growth slowed between 1993-94 and 1994-95, comparable to the levels of domestic own title sales revenue. Yet the larger number of publishers with export revenue in 1994-95 is proof that export markets

are being tapped by an increasing number of Canadian firms, reducing concentration by just a few firms. For those who believe that a competitive marketplace is a healthier one, this is a good sign. □

## The Effect of Exports on the Film and Video Industry

*Michael Pedersen, Project Manager, Film Surveys*

### Export growth driving industry

The last 4 years have seen phenomenal growth in foreign sales of film, video and audio-visual products by independent producers in Canada. From only \$83 million in 1991-92, exports doubled to \$163 million in 1994-95, and then doubled again in 1995-96 to \$321 million. During this same period domestic production revenue grew by only 12% or \$60 million. It is clearly exports that have been the most dynamic driver in the industry.

The independent Canadian production industry has undergone a pronounced change in its structure as a result of the growing importance of exports. More than ever, the industry can be split between large, export-oriented producers and smaller, domestic-oriented firms with large exporters growing the fastest. A bigger-budget television and film industry has emerged in which foreign markets are sources of revenue as important as the domestic market.

### Growth not general : Exporters a pre-eminent minority

Out of 616 companies responding to the 1995-96 survey (See *Note to Readers*), 100 were exporters. Most of the growth in exports has come to those companies already active in the export market, not from companies entering the export market for the first time. The percentage of producers reporting any foreign production revenues has increased only from 13.8% in 1991-92 to 16.2% in 1995-96.

The growth in exports has gone hand in hand with the creation of a leading cadre of large producers capable of producing products that can compete in foreign markets. The share of production revenues garnered by the top exporters (defined as the top 20

### Note to Readers

This article uses data from the Film, Video and Audio-Visual Survey to examine how foreign sales affect the Canadian film and video industry. The survey is a census of independent producers of film and video in Canada, 99% of which are Canadian owned. The data in this release do not include location shootings in Canada by foreign film producers, production data from the National Film Board, nor in-house productions by television stations. These data do not account for exports done by film distributors, which are covered by a separate survey.

Television services include conventional, specialty and pay television.

The non-theatrical, non-television sector comprises productions sponsored by advertising agencies, education institutions, government boards, agencies, crown corporations or departments, and the industry at large.

Production revenue includes revenue received from private and public sector clients for current and previous years' productions, outright sales and rentals, contracts, sponsor's payments and remittances from distributors after their expenses.

Exports consist of production revenues received from foreign clients. Sales to foreign markets through Canadian distributors are not included in foreign sales.

Total revenue includes production revenue, revenue from rental of production facilities (including equipment and personnel), revenue from post-production services, revenue from distribution of other producers' film/video/audio-visual products, other operating revenue, non-repayable financial aid recognized as revenue for the financial year, dividends, and other non-operating revenue.

### Production revenue by type of producer



**Table 1**  
**Exporters the Largest Producers in Industry, 1995-96**

|                                       | Non-exporters | Small Exporters |                  | Top 20 Exporters |                  | Total     |
|---------------------------------------|---------------|-----------------|------------------|------------------|------------------|-----------|
|                                       |               | foreign markets | domestic markets | foreign markets  | domestic markets |           |
| # producers                           | 462           | 80              | 80               | 20               | 20               | 562*      |
| Average production revenue            | 711,180       | 236,600         | 1,229,000        | 15,092,900       | 6,575,500        | 1,564,400 |
| Share of total production revenue (%) | 37.3          | 2.2             | 11.2             | 34.3             | 15               | 100       |

\* Those reporting production revenues.

exporters that earned at least 40% of their production revenues from exports) more than tripled from 16% in 1991-92 to 49% in 1995-96. Top exporters earned production revenues on average 15 times larger than those of smaller exporters and 30 times larger than those of non-exporters, although this was partly due to the existence of a small number of particularly large producers.

#### Exporters getting larger in foreign markets

With domestic production revenues growing slowly, companies have looked to exports for growth. The top exporters have moved into bigger-budget dramatic television programming and, to a lesser extent, theatrical features, as a means of exploiting the export market. Average TV budgets for top exporters increased 70% from

1991-92 to 1995-96, and average theatrical feature budgets increased almost 400% during this same period, although the volume of TV production still greatly exceeds that of film production. Meanwhile, TV program budgets for non-exporters were fairly constant, while theatrical feature budgets increased only 52%.

Producers with foreign sales received a majority of their production revenues - 58% - from foreign sources, indicating that foreign production sales are not sidelines, but are a vital element in their sales mix. Exporting is especially important to dramatic TV productions. Given the expense of most top quality television and film productions, finding larger markets in which to sell them is important to the financial viability of producing them.

Exporters spent considerably more on sets, equipment and technology. Depreciation and amortization costs amounted to almost \$149 million (19% of total operating expenses) for exporters in 1995-96, but only \$12 million (3% of total operating expenses) for non-exporters. This appears to reflect a high level of investment in the technological sophistication required for the high production values of their products necessary for competing in large markets such as the United States and Europe.

While expenditures outside Canada may be incurred for any part of the production process, including foreign location shooting or the creation of special effects, just three per cent of the expenses of non-exporters occurred outside the country. In contrast, 14% of the total expenses of exporters were foreign, while the top 20 exporters were slightly more international in the scope of their operations, with 15% of their expenses incurred outside of Canada.

**Table 2**  
**Share of Total Production Revenue, 1995-96**

|  | Non-exporters | Exporters - domestic sales | Exporters - foreign sales | Total        |
|--|---------------|----------------------------|---------------------------|--------------|
| Total production revenues (\$000)                    | 328,565       | 229,830                    | 320,786                   | 879,181      |
| By client type: (%)                                  |               |                            |                           |              |
| Television and TV distributors                       | 14.6          | 5.7                        | 22.5                      | 42.8         |
| Theatres, film producers and theatrical distributors | 0.8           | 1.6                        | 6.2                       | 8.6          |
| Advertising agencies                                 | 6.5           | 8.2                        | 1.6                       | 16.3         |
| Educational institutions                             | 0.2           | 0.0                        | 0.0                       | 0.2          |
| Government boards                                    | 3.4           | 4.2                        | 0.1                       | 7.7          |
| Industry   | 5.9           | 0.4                        | 0.5                       | 6.8          |
| Other  | 5.9           | 6.1                        | 5.7                       | 17.6         |
| <b>Total</b>   | <b>37.3</b>   | <b>26.2</b>                | <b>36.5</b>               | <b>100.0</b> |

**Table 3**  
**Top three revenue sources show that exporters are more diversified**

|   | Non-exporters | Exporters | Top 20 exporters |
|---|---------------|-----------|------------------|
| Total revenue (\$000)                     | 423,240       | 802,975   | 672,387          |
| % earned from:                            |               |           |                  |
| production                                | 78            | 69        | 64               |
| distribution of other producers' products | NA            | 17        | 21               |
| other operating revenue                   | NA            | 11        | 12               |
| rental of production facilities           | 6             | NA        | NA               |
| non-repayable financial aid               | 6             | NA        | NA               |

NA : not applicable

### TV productions

While one-third of the television productions of non-exporters were in French, the level for exporters was 13%. This is probably a reflection of the size and proximity of the American market. Unfortunately, however, there are no data on the country to which individual productions were sold. Individual producers generally produce in English or French, but not in both. The dominance of English-language titles among exports is the result of the participation of English-language producers in exporting.

Exporters tend to produce big-budget, English-language television dramas, while non-exporters produce smaller-budget information and entertainment productions (games, variety/talk shows, music/dance) in both French and English. In 1995-96 exporters reported production of 675 hours of television programming, with budgets of \$322 million. Non-exporters reported 3,761 hours of television programming, with budgets of \$167 million.

### Theatrical features

Similar differences with respect to language exist in theatrical titles. While exporters reported only 10 productions, of which 9 were in English and 1 French, non-exporters reported 39 productions, of which 23 were English, 14 French and 2 in other languages. Despite producing only one-quarter the number of theatrical titles, the budgets of exporters exceeded those of non-exporters by 25% (\$79 million vs \$63 million).

### Advertising and video

In addition to the theatrical and TV markets, advertising as well as corporate and educational videos, also represent a large part of the production industry. However, the corporate and educational video market is a major source of revenue for non-exporters only; ninety-five per cent of video titles were created by non-exporting producers, and their budgets for this activity exceeded those of exporters by 7 to 1.

Video producers are likely to be specialized in videos only, with no film or television productions to their credit. In fact, the film and video industry could be characterized as two industries - one geared towards the production of film and television, and the other geared towards not-for-television video (especially corporate and educational videos). Industry dominates the market for these video productions.

Advertising serves as an important side-line for many television producers. Sales to advertising agencies were significant for both exporters and non-exporters. Small exporters earned almost 70% of their production revenues from advertising, and 85% of this was from domestic sales.

Non-exporters have remained reliant on small-budget TV productions (especially news and information programs) and advertising and corporate videos. They earn 75% of their production revenues from these three sources, combined.

### Exporters also distributors of others' products

Although production sales are the major source of revenue for both exporters and non-exporters, exporters are more diversified with 31% of their total revenues from other sources versus 22% for non-exporters. Exporters earned 17% of their total

**Table 4**  
**Non-exporters employ more workers, but exporters pay out more in wages, salaries and fees**

|  | Non-exporters | Exporters | Top 20 exporters |
|--|---------------|-----------|------------------|
| # full-time paid employees               | 1,842         | 1,761     | 1,384            |
| # part-time paid employees               | 1,665         | 621       | 56               |
| Salaries, wages and benefits (\$000,000) | 79            | 96        | 74               |
| # freelancers                            | 8,279         | 2,292     | 843              |
| Freelancers' fees (\$000,000)            | 47            | 37        | 15               |
| Total compensation (\$000,000)           | 126           | 133       | 89               |

revenues from distribution of other producers' products and a further 11% from other operating sources. Non-exporters have no significant sideline in distribution, but earned small portions of their revenues from rental of production facilities and non-repayable financial aid (i.e. grants, subsidies).

**Exporters pay well, while non-exporters employ more**

While exporters accounted for two-thirds of total expenses, they accounted for just slightly more than one half of the industry wage bill.

However, given that they reported lower numbers of full-time and part-time workers, as well as freelancers, they appear to be providing higher rates of pay. The top 20 exporters, which employ an especially high percentage of full-time employees and very few part-time workers, pay high wages. This may be the result of higher rates of unionization, higher levels of skills or the employment of a higher proportion of professionals by the top exporters.

While exporters earned two-thirds of total industry revenues in 1995-96 -

with the top 20 exporters earning over 90% of these revenues - it was the smaller, non-exporting producers that provided the majority of jobs.

**Summary**

The growth of exports has changed the industry by creating a small group of big producers that dominate exports and account for a huge share of total revenues. Exporters in total, but especially the largest exporters, are accounting for increasing shares of total production revenue through their participation in foreign markets.

Exporting is not just a sideline for many of these companies; it is as important as the revenues from the Canadian market. These big producers and other exporters differ from the non-exporters in the following characteristics:

- they are much larger, on average, in terms of production revenues;
- they are more capital intensive, probably owing to the more demanding technical requirements of producing film and television production of exportable value;
- they concentrate their production on bigger budget, English-language film and TV productions;
- they employ fewer people, relative to their earnings, but pay as much in total wages and benefits. □

**Did you know...? Highlights from the 1995-96 Survey of Heritage Institutions\***

Attendance is increasing at Canada's museums, aquariums, nature parks and other heritage institutions, and visitors are paying more for the chance to visit these sites. With government grants not keeping pace with operating expenditures, the nation's 2,562 not-for-profit heritage institutions have sought more revenue through higher admission fees and commercial ventures such as gift shops and concessions, as well as donations from private and corporate sources.

Almost 113 million Canadian and foreign visitors visited heritage institutions in 1995-96, up 2% from 1993-94. Although still below the 1989-90 attendance level, this increase continued the trend of the previous 3 years. Increased attendance at museums and nature parks - that is, national, provincial, municipal and other parks with interpretation programs - more than offset declines at other types of institutions, such as archives, planetariums, zoos and botanical gardens.

While government operating grants have increased since 1989-90, they have been outpaced by the growth in operating expenditures of heritage institutions. Operating grants from all levels of government went up by 16% between 1989-90 and 1995-96 while the total operating expenditures of all heritage institutions excluding nature parks grew by 26% in the same period.

During the seven-year period from 1989-90, overall revenue from admissions increased 68% to \$91.2 million in 1995-96. In museums specifically, revenue from gift shops and concessions almost doubled. Despite this growth, 65% of operating revenues of heritage institutions (excluding nature parks) came from the public purse, in 1995-96. This did, however, represent a decline of 7 percentage points from 7 years earlier. Some of the decline in government support was offset by private individuals and corporations, whose contributions increased 12% from 1993-94 and 26% from 1989-90.

Heritage institutions, excluding nature parks, relied on a volunteer workforce of 52,000 people and a much smaller paid workforce to maintain services. In 1995-96 they employed 23,200 workers, down from 24,100 in 1993-94 and paid them \$534.9 million in salaries and wages. This represented 57% of all operating expenses.

Canadian and foreign visitors flocked to nature parks in record levels in 1995-96. A total of 58.5 million people visited such parks as Banff, Jasper and Algonquin, surpassing the previous peak of 56.8 million recorded in 1989-90.

\* Although to some extent the magnitude of the changes shown here may be attributable to the addition of some companies to our survey frame, the direction of the trends described here remains unchanged.

## Television and Radio Audience Levels Drop

**Lotfi Chahdi, Culture Statistics Program**

Canadians spent less time tuned into their televisions and radios in the fall of 1996 compared to 1995. They spent, on average, almost half an hour less per week in front of the tube, and they listened almost an hour less a week to the radio.

Viewers watched television an average of 22.8 hours a week in the fall of 1996<sup>1</sup>. The decline returns television viewing to more customary levels following a jump in 1995 to 23.2 hours a week, which was attributed to the introduction of eight speciality cable channels.

For radio, 1996 was the third straight year of declining audiences<sup>2</sup>. Canadians tuned in an average of 20.2 hours a week in 1996, nearly an hour less than the 21.0 hours reported in 1995 and almost 90 minutes less than the peak of 21.6 in 1993.

### Francophone Quebecers watch the most television

Over the past three years, Quebecers have been the provincial group that has watched the most television. Within the province, however, viewing time varies a great deal depending on language. In the fall of 1996 while Francophones in Quebec posted the highest weekly viewing level at 26.6 hours, this was four hours more than Anglophone Quebecers. At the other extreme, Albertans spent the least time watching television, at 20.3 hours per week. Of this time, 1.6 hours were spent watching videotapes, the highest rate of any province. (For all Canadians, videotapes were reported as the source for 6% of all viewing in 1996).

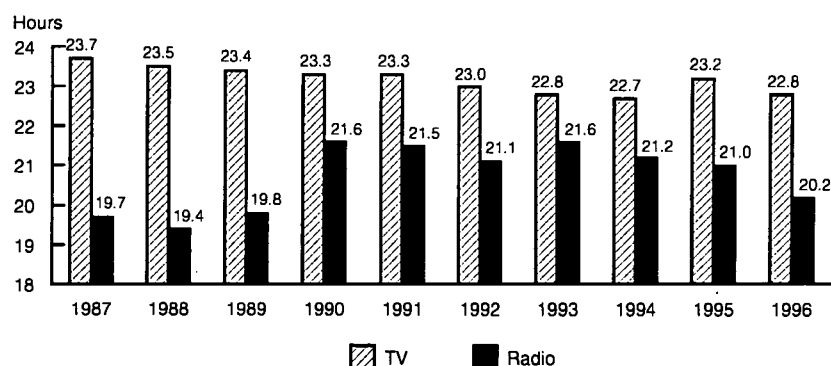
### Canadian programs are more popular with Francophones

Overall, Canadian programs represented

<sup>1</sup> Underlying data were collected by a BBM Bureau of Measurement survey of a sample of Canadians aged two and over. Viewing data cover seven set days and were collected using a journal-type questionnaire over a period of four weeks in November 1996.

<sup>2</sup> Underlying data were collected by a BBM Bureau of Measurement survey of a sample of Canadians aged 12 and over. Listening data cover seven days a week and were collected using a journal-type questionnaire over eight weeks in September and October 1996.

**Average number of hours a week tuned in to television and radio down from last year**



39% of Canadians' total viewing.

However, the popularity of programs with Canadian content is much higher among Francophones, for whom these programs represented two-thirds of their total viewing time, an increase of over 5% compared with 1991. In particular, in the area of dramatic programming (comedy and drama combined), Canadian programs were more popular with Francophones, accounting for 38% of their time spent watching this type of program, while the figure was only 6% among Anglophones. Differences may be partially attributed to the fact that Francophones do not have the same range of foreign drama in their language that the American networks offer Anglophones. In fact, domestically produced programs of all types attracted scarcely 29% of the total viewing time of Anglophones, although this represents an increase of over 7% compared with five years earlier.

Of all Canadian programs, news and public affairs were the most popular and represented 42% of the tuning to Canadian programs among Francophones and 53% among Anglophones.

### Television more popular with women than men

Among adults, women watched more television than men; while both men and women aged 60 and over watched more television than younger people. Women aged 60 and over watched more television than any other group (36.5 hours per week). Men aged 18 to 24 watched the least television of all viewers (14.4 hours per week), followed by teens aged 12 to 17 (17.3 hours per week) and children aged 2 to 11 (17.9 hours per week).

### Fewer people listening to the radio

The drop in radio listening is a phenomenon observed among all age-sex groups, with teens aged 12 to 17 continuing to be the group that listens least. While this may seem surprising at first, teenagers usually have many fewer hours per day when they are able to listen to the radio because they are generally in school. Teens averaged 10.6 hours per week listening, which is approximately half of the time reported by adults.

### Average share of radio listening for persons 12 and older dominated by adult contemporary, gold, oldies, rock Fall 1996

| Musical Formats                     | Per cent     |
|-------------------------------------|--------------|
| Adult Contemporary/Gold/Oldies/Rock | 38.1         |
| Middle-of-the-Road                  | 2.6          |
| Country                             | 14.5         |
| Album-Oriented-Rock                 | 4.1          |
| Contemporary                        | 6.4          |
| Easy Listening                      | 2.2          |
| Dance                               | 1.4          |
| <b>Other Formats</b>                |              |
| CBC                                 | 9.5          |
| Talk                                | 13.2         |
| U.S. Stations                       | 3.3          |
| Others                              | 4.7          |
| <b>Total</b>                        | <b>100.0</b> |

In terms of what people listen to, the format grouping including Adult Contemporary, Gold, Oldies and Rock music continues to be the most successful, accounting for 38% of total listening in 1996, an increase of 12% over the previous year. Country music also grew considerably (8%), maintaining its second-place ranking with 15% of all listening.

**Average hours per week of television viewing lowest for Albertans and young men  
Fall 1996**

|                  | Canada | Nfld | PEI  | NS   | NB   | Quebec  |        |       | Ont  | Man  | Sask | Alta | BC   |
|------------------|--------|------|------|------|------|---------|--------|-------|------|------|------|------|------|
|                  |        |      |      |      |      | English | French | Total |      |      |      |      |      |
| Total population | 22.8   | 24.0 | 21.3 | 24.5 | 24.2 | 22.5    | 26.6   | 26.0  | 21.8 | 22.3 | 22.5 | 20.3 | 21.0 |
| Men              |        |      |      |      |      |         |        |       |      |      |      |      |      |
| 18+              | 21.9   | 21.8 | 20.3 | 23.5 | 22.6 | 21.6    | 25.2   | 24.6  | 21.0 | 21.7 | 21.3 | 19.6 | 21.1 |
| 18-24            | 14.4   | 15.2 | 10.7 | 18.7 | 15.2 | 15.5    | 15.5   | 15.6  | 14.1 | 11.3 | 14.5 | 13.2 | 13.9 |
| 25-34            | 18.8   | 21.2 | 21.9 | 21.7 | 20.4 | 19.0    | 21.0   | 20.7  | 18.1 | 19.8 | 18.6 | 16.7 | 17.2 |
| 35-49            | 19.9   | 20.8 | 18.0 | 21.2 | 21.0 | 18.7    | 23.6   | 22.8  | 18.7 | 20.3 | 17.7 | 17.7 | 18.9 |
| 50-59            | 23.8   | 24.8 | 23.8 | 26.3 | 22.9 | 21.1    | 28.3   | 27.1  | 22.1 | 23.9 | 21.8 | 21.4 | 22.9 |
| 60+              | 32.5   | 27.4 | 26.3 | 30.3 | 32.0 | 31.7    | 37.9   | 36.2  | 31.4 | 30.9 | 31.7 | 31.0 | 31.9 |
| Women            |        |      |      |      |      |         |        |       |      |      |      |      |      |
| 18+              | 26.5   | 28.0 | 24.4 | 28.3 | 28.5 | 25.4    | 31.7   | 30.7  | 25.0 | 26.2 | 27.3 | 23.7 | 23.7 |
| 18-24            | 18.5   | 23.8 | 18.5 | 21.8 | 21.8 | 15.7    | 19.6   | 18.8  | 18.7 | 19.7 | 22.3 | 16.6 | 16.3 |
| 25-34            | 23.4   | 30.1 | 23.6 | 27.1 | 28.0 | 22.9    | 27.2   | 26.4  | 22.2 | 24.7 | 22.6 | 21.1 | 19.8 |
| 35-49            | 23.0   | 25.1 | 22.6 | 25.4 | 27.8 | 21.3    | 28.2   | 27.1  | 21.3 | 22.0 | 22.6 | 20.4 | 20.1 |
| 50-59            | 28.9   | 30.7 | 23.1 | 29.1 | 30.8 | 29.1    | 35.4   | 34.1  | 27.1 | 26.7 | 27.8 | 25.6 | 25.2 |
| 60+              | 36.5   | 31.8 | 30.4 | 35.2 | 31.7 | 33.8    | 44.9   | 42.5  | 34.5 | 34.6 | 37.4 | 35.0 | 34.5 |
| Teens<br>12-17   | 17.3   | 18.9 | 18.9 | 18.1 | 17.3 | 18.3    | 18.3   | 18.3  | 17.2 | 18.0 | 16.4 | 16.0 | 16.0 |
| Children<br>2-11 | 17.9   | 21.9 | 17.1 | 19.7 | 20.0 | 18.2    | 20.5   | 20.1  | 17.6 | 16.1 | 17.4 | 16.5 | 15.5 |

Note: For Quebec, the language classification is based on the language spoken at home. The total column includes those respondents who did not reply to this question or who indicated a language other than English or French.

□

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