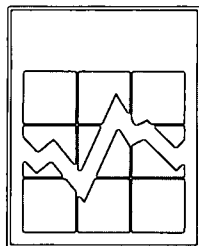


F O C U S O N

CULTURE



87-004 63

Winter 1990

Volume 2, No. 4

Who Listens to Radio?

by John Gordon, Radio and Television Project Manager

Is there really any need for radio today? If it's music that you need, there are portable cassette and compact disc players which will reproduce your favourite artists anywhere in high fidelity - and you get to pick your own music. If it's news that you crave, newspapers and especially television are ubiquitous. What else could you want from radio?

For record producers, radio is one of the prime media for the dissemination of new recordings. Others will affirm that the great thing about radio is that while you're listening, you can also jog or commute to work. Not surprisingly, a time use survey showed that 95% of radio listening takes place as a secondary activity.¹

The radio listening database of the Culture Statistics Program may not tell us why we listen to radio, but it can tell us who listens. In the fall of 1989, 94% of Canadians listened at least once a week. The overall reach of radio hardly varied from province to province, but fewer children and teens listened (79% and 90% respectively) while adult women listened slightly more than men (97% vs. 95%).

The average hours per week of listening showed more variation among the provinces. At almost 20 hours per week, Québécois reported the highest listening; New

Brunswickers reported only 16 hours per week. Nationally, the level of radio listening has remained relatively stable over recent years and in fall 1989 stood at 18.8 hours per week per capita.

Advances in electronics have increased the portability of radio. Thirty-eight percent of listening took place outside of the home. For adult men (age 18 and over) this listening represented half of all their listening. Listening peaks occur immediately preceding 9:00 AM and immediately following 3:00 PM, so much of this out-of-home listening probably coincided with travel to and from work.

In contrast to television, radio stations are licensed to provide material within specific formats established by the Canadian Radio-television and Telecommunications Commission. These formats do not restrict a station from broadcasting any specific material, but are intended to establish the primary thrust of the station. The combination of *Adult Contemporary* and *Gold* formats accounted for a quarter of all listening while *Middle-of-the-Road* stations gained a further 20%. *Country*, *Album-Oriented-Rock*, and *CBC* stations each garnered around 10%. United States' stations accounted for less than 4%.

The popularity of the *Adult Contemporary/Gold* and *Middle-of-the-Road* formats can be seen in all age/sex group combinations measured. In each group one of these two formats received either the greatest or second greatest tuning and, in most instances, they occupied both first and second place. The order of the two formats

Continued p. 2

In This Issue ...

Who Listens to Radio?	1
Focus on Data	3
A Socio-Economic Impact Assessment of the Ontario Film and Video Industry	4
The Book is Still King: Public Libraries in 1988-89	5
Developing and Monitoring Heritage Tourism in Alberta	6
New Publications	7

Focus on Culture (Catalogue 87-004) ISSN 0843-7548 is published four times a year under the authority of the Minister of Industry, Science and Technology, © Minister of Supply and Services, Canada, 1990.

Managing Editor: Renée Langlois, (613) 951-1566

Subscription Rates: Canada: \$6.25 per issue, \$25 annually. United States: US\$7.50 per issue, US\$30 annually. Other countries: US\$8.75 per issue, US\$35 annually. Toll-free order service in Canada: 1-800-267-6677.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without prior written permission of the Minister of Supply and Services Canada.

¹ Canadian Time Use Pilot Study - 1981. Education, Culture and Tourism Division, Statistics Canada.



Statistics Canada
Statistique Canada

Canada

did, however, vary with age. *Middle-of-the-Road* was the most popular format with all male and female age groups 45 years of age and over; *Adult Contemporary/Gold* was the preferred format of all groups under 45 with the exception of males 18-24.

Album-Oriented-Rock reigned supreme for these young males (age 18-24) and was the second choice for females of the same age and males 25-34.

Country Music received little tuning from younger audiences but for those over 35 it was almost consistently in third place. The two exceptions were males 50-54 where it was in second place and females 65 and over where the *Country* format was displaced to fourth by CBC.

The CBC's greatest popularity came from older audiences. Although CBC tuning represented less than 5% for audiences under 25, its share grew steadily as age increased, reaching 16% for both men and women over 65. An even more pronounced growth in

the popularity of the CBC can be seen as education increases. Although it drew less than 5% of the tuning of listeners who had not completed high school, its share grew to 17% for those with some university education and to 28% of all listening for those with a university degree. In fact, for university graduates, the CBC had the largest share of listening.

For those with less than a university degree, the *Adult Contemporary/Gold* format had the greatest share for all groups. For these same groups, the *Middle-of-the-Road* format was in second place. The *Country Music* format showed a pattern opposite to the CBC, achieving its lowest share among university graduates.

Analyzing the audience by occupation, the pattern looks very similar. In all but two occupation groups, the *Adult Contemporary/Gold* format received the largest share of tuning. The exceptions were farmers and farm workers who showed a strong preference for *Country Music* and the artistic/literary/recreational grouping which preferred the CBC.

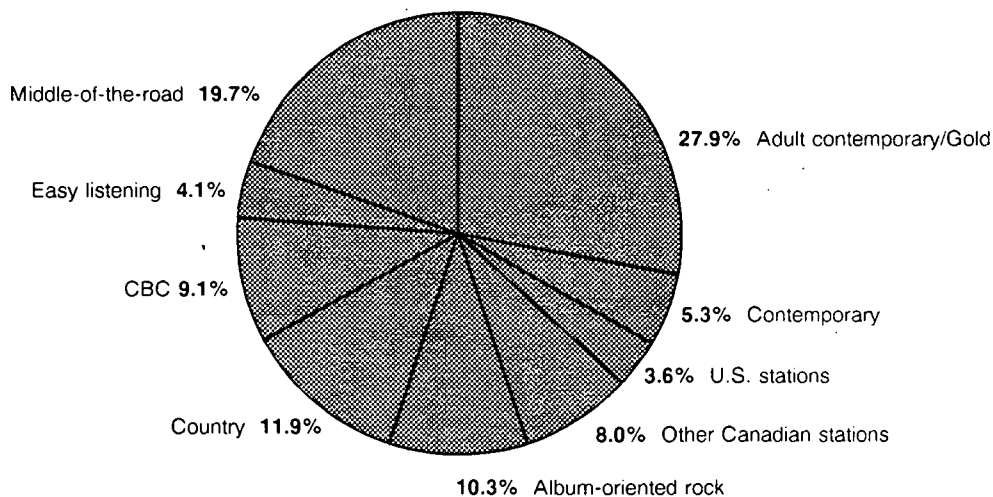
Following true to form, where *Adult Contemporary/Gold* was the number one format, *Middle-of-the-Road* was usually second. The exceptions were the fishing and skilled trades sectors where the *Country* format placed second and the professional sector where the CBC was almost equal in popularity to the first place *Adult Contemporary/Gold* format.

So do we listen to radio? Yes, over two hours and forty minutes a day. What do we listen to? A little of everything but especially *Adult Contemporary/Gold* and *Middle-of-the-Road*. The remaining listening (just over half of the total) is shared by the other formats with some showing considerable popularity in specific niches.

The next time you're about to complain about your kids' radio listening habits, pause for a moment and remember – it can't be all that bad; nearly everybody does it. □

Figure 1

Radio Listening by Format, 1989 Total population age 7 and over



Not Only Gold Glitters

In Canada, FM radio stations are licensed with a specific format which defines the character of the station's programming. These formats require that certain minimums be met but do not normally restrict the programming beyond these minimums. AM stations do not have to follow a specific format but for the purposes of the accompanying analysis, they have been assigned to a format based on their programming at the time of the survey.

Gold format stations largely program past hits and other selections released within the last 30 years. However, some *Adult-Contemporary* (AC) stations, which program primarily soft-rock and pop music, play many selections classed as gold in addition to new adult-contemporary releases. As well as these Gold-Based AC stations, the format also encompasses *Current-AC* stations, which emphasize more-recent releases and *New-AC* stations, which lean towards new age and soft contemporary jazz.

In the accompanying analysis, the *Adult-Contemporary* and *Gold* formats have been combined because of these similarities. Also included in the combination are the FM formats known as *Group IV* and *Group IV Dance*. FM formats are not perfectly comparable to AM formats but to date *Group IV* looks like the FM equivalent of the *Gold* AM format.

Group IV Dance, as one would expect, includes mostly dance music and appeals to a younger audience. (At the time of the fall 1989 survey, there were no *Group IV Dance* stations outside Québec.)

Within the *Adult Contemporary-Gold* combination, *Adult Contemporary* contributed almost three-quarters of the total listening while *Gold* accounted for 6%. The remainder was almost equally split between the two *Group IV* categories.

The second most popular format is *Middle-of-the-Road*. This format is softer than *Adult Contemporary* and tends to program artists and selections released prior to 1960.

Also covered are music-oriented stations that include numerous talk-oriented programs and stations playing the "Music of Your Life". These stations play more vocal than pure instrumental selections.

Album-Oriented Rock (AOR) is an FM format that draws most of its audience from the 18-34 age group. It programs not less than 70% rock music and plays a significant number of album cuts. As is the case for all FM formats in Canada, AOR stations play not more than 50% hits.

Contemporary stations, also known as Top 40 or Hit Radio, mostly program current hits with little talk. It is most popular with teenagers, but is also listened to by a significant number of pre-teens and young adults.

The *Easy-Listening* format is almost self explanatory. Also known as Beautiful Music, it programs soft, predominately instrumental music. *Country* stations, as might be expected, play almost exclusively country music. Canadian Broadcasting Corporation (CBC) stations are non-commercial and provide a unique variety of information and entertainment programming. □

Focus on Data

Expenditures on Wages, Salaries and Fees:

Film producers, 1988-89:	\$201 million
Film distributors, 1988-89:	\$ 44 million
Film laboratories and post-production services companies, 1988-89:	\$ 53 million
Motion picture theatres, 1988-89:	\$ 84 million
Record label companies, 1988-89:	\$ 66 million
Book publishers and exclusive agents, 1988-89:	\$195 million
Periodical publishers, 1988-89:	\$170 million
Broadcasters, 1989:	\$583 million
Cable Systems, 1989:	\$279 million
Public libraries, 1988-89:	\$339 million
Federal government - Culture, 1988-89	\$962 million
Provincial and territorial governments - Culture, 1988-89	\$320 million
Heritage institutions, 1987-88:	\$332 million
Performing arts companies, 1987-88:	\$162 million

Most Recent Data Available

Sound Recording: 1988-89
Periodical Publishing: 1988-89
Film and Video Producers: 1988-89
Film and Video Distributors: 1988-89
Film Laboratories and Post-production Services: 1988-89
Motion Picture Theatres: 1988-89
Public Libraries: 1988-89
Government Expenditures on Culture: 1988-89
Heritage Institutions: 1987-88
Radio and Television: 1989
Performing Arts: 1987-88
Book Publishing: 1988-89

Socio-Economic Impact Assessment of the Ontario Film and Video Industry

by James Nadler, Senior Policy Analyst, Ontario Film Development Corporation

"In the film industry nobody knows nothing." – William Goldman, screenwriter (*Butch Cassidy and The Sundance Kid*)

What "nobody knows" is how to predict which film will appeal to a global audience. Following the right creative hunch, picking the great script, directing the luminous performance – that is the art of film.

But film is also a business. The U.S. mainstream film is a commodity, marketed like a can of pop, splashed across 2,000 North American screens and backed by a \$35 million ad campaign and promotional tie-ins. It is harder than ever for the unusual or provocative film to find its way onto our screens.

Ontario producers have become increasingly sophisticated in order to survive in the international marketplace. But the industry needs more than good creative hunches to succeed. The Ontario Film Development Corporation (OFDC) has always recognized the industry's need for up to the minute economic information. The data is also needed to track the effect of government programs which support the industry to a total \$1.2 billion annually.

The OFDC recently commissioned the consulting firm Nordicity/NGL to conduct a comprehensive *Socio-Economic Impact Assessment of the Ontario Film and Video Industry*. The information gathered will form the basis for an integrated, industry driven strategic plan for Ontario's film and television industry. It also creates a basic policy and advocacy tool.

The Assessment's data came from four sources. Existing Statistics Canada information on the industry was reviewed and used. A supplementary company survey was conducted through Statistics Canada.

More than 25 industry representatives were interviewed in depth to obtain a qualitative assessment of the industry. Finally, the mass of existing government film agency information (primarily OFDC, CAVCO and Telefilm) was collected and analyzed.

The Culture Statistics Program of Statistics Canada does not normally collect the detailed data at the provincial level required for this Assessment. Statistics Canada and NGL Consulting, with the aid of the Assessment's advisory panel and the OFDC, designed three supplementary questionnaires. The experience gained by Statistics Canada through the supplementary surveys and subsequent meetings with the

Department of Communications, the OFDC and film industry players helped Statistics Canada in its review of its questionnaires.

The data collected provided a timely snapshot of the Ontario industry. Table 1 outlines the total domestic output of the industry in Ontario for 1988-89 at \$2.7 billion. The total direct and indirect economic impact on Ontario of its film industry was estimated at \$5.4 billion.

Total direct employment in the Ontario industry is 35,700. Of that, 16,300 individuals are employed in production and post-production sectors and 19,400 are employed in distribution, exhibition and retail sectors. In the Ontario industry 10,300 members belong to various unions and guilds.

"There's nothing wrong with the film industry that a few hit movies couldn't cure." – Ben Hecht, screenwriter (*The Front Page*, *Notorious*)

Continued p. 5

Table 1 Estimated Direct Economic Output of The Film and Video Industry in Ontario in 1988-89 (\$000,000)

Sector	Output
Production:	
• independent film and television	\$241.3
• in-house public TV	\$167.4
• in-house private TV	\$87.7
• in-house pay/specialty	\$15.1
• cable community channel	\$18.4
• sponsored	\$165.2
• in-house corporate video	\$50.0
• U.S. location/co-venture	\$106.8
Sub-Total:	\$851.9
Post-Production:	\$161.6
Production & Post-Production:	\$1,013.5
Distribution:	\$122.9
Videocassette Wholesale:	\$159.2
Exhibition:	
• theatres	\$141.0
• video retail outlets	\$212.3
• private television	\$275.7
• public television	\$361.0
• pay-TV/specialty	\$96.6
• cable	\$335.7
Sub-Total:	\$1,422.4
Distribution, Wholesale and Exhibition:	\$1,704.5
Total Net Domestic Output:	\$2,718.0

The Assessment reports two major but seemingly contradictory findings: the film and video industry is vital to Ontario with an impressive economic impact. Yet the industry is faced with many critical and long standing problems that prevent it from reaching its full economic and cultural potential. These issues cannot be solved with a few hit movies and must be addressed on an ongoing basis.

The Assessment brings into vivid relief the domination of Ontario's movie theatres and television screens by foreign, mostly American product. Only 26% of television "consumption" in Ontario is of Canadian product. The Assessment points out that through our public affairs and news programs, Ontarians are kept as well informed about events and issues effecting them as anyone in the world. However the level of Canadian content for dramatic TV programming and films remains disappointingly low. For example, Canadian films capture 3% of the screen time in Ontario and less than 2% of the box office.

Film and video defines Canadian culture for Ontario residents and reflects the diversity of Ontario's heritage and society. As U.S. products dominate the areas of feature films and television drama, it may be American, not Canadian, values, traditions and goals that are being disseminated.

Other issues facing the industry include the ongoing difficulty of Canadian producers in raising production financing and marketing their product effectively. The Canadian market alone cannot support a feature film and video industry. (With rising budgets, not even the U.S. market can support a major film without foreign sales). In the global marketplace Canadian producers may be at an advantage given their experience with international co-productions, co-ventures and partnerships.

To sustain this competitive advantage the industry needs more data about itself on an ongoing basis. In order to make this data available, the Socio-Economic Impact Assessment recommends that the federal Department of Communications take the lead in supporting the development of a national database on the film and video industry. □

The Book Is Still King: Public Libraries in 1988-89

by Thomas Fitzpatrick, former Public Libraries Project Manager

1988-89 was a year of both stability and change for public libraries. In general, trends established in previous years continued; for example, circulation was up 1% at 174 million transactions, a turnover rate of three times the total print material held. On the other hand acquisitions increased by 10%, the first major increase in three years, reaching 4.4 million items. Acquisitions were 7% of total holdings.

Library holdings exhibited this same paradox of stability and change. Print material continued to dominate holdings accounting for fully 95% of the total, unchanged from 1987-88. But non-traditional holdings, while remaining a small fraction of the total, continued on an upswing with holdings of talking books increasing by 14% and of video by 31%. Film continued to decline.

The financial situation showed little change from the previous year. Both revenues and expenditures were up 7% in 1988-89, to \$568 and \$542

million respectively. Public libraries had a total operating surplus of \$26 million, \$3 million more than in 1987-88.

The sources of funding remained constant. Local government continued to supply 74%, followed by provincial governments at 20%; these shares were unchanged from 1987-88.

The relationships among the three largest expenditure items was also unchanged, with personnel accounting for 63%, book purchases, 11% and debt service, 2%, in both years. The number employed by public libraries increased at the same rate as the increase in personnel expenditures, 7%. This increase was distributed proportionately across occupational categories. Professional librarians constitute 17% of the library labour force, as do library technicians. Support staff make up another 61%.

Continued p. 6

Structural Changes
in Major Survey Characteristics
Between 1987-88 and 1988-89
(in thousands)

	Number and Proportion of Total 1987-88	Number and Proportion of Total 1988-89	% Change
TOTAL HOLDINGS	70,737	73,809	4%
Print	57,405 (91%)	59,581 (91%)	3%
Recordings	1,721 (2%)	1,860 (2%)	7%
Film	101 (.01%)	97 (.01%)	-4%
Video	107 (.01%)	155 (.01%)	31%
Talking Books	244 (.04%)	285 (.04%)	14%
TOTAL EMPLOYMENT	12,287	12,769	7%
Professional Librarians	2,130 (17%)	2,155 (17%)	1%
Support Staff	7,564 (61%)	7,764 (61%)	2%
Technical Staff	2,172 (17%)	2,285 (17%)	5%
Other Professionals	267 (2%)	301 (2%)	11%

The number of permanent service points increased by 3%, going from 3,024 to 3,101. These are the number of libraries, branches and mobile stations stops at which service is provided to users on a regular basis. On a per capita basis there was one permanent service point per 8,300 people in 1988-89, compared to one for every 8,500 people in 1987-88.

Thus, while there were some significant changes in 1988-89, these did not change the basic structure of the libraries. Non-traditional holdings remained minuscule in comparison with bookstock, so that the major increase in their acquisition did not have an immediate impact on the make up of total holdings. If changes in acquisition patterns continue, however, libraries in ten years will be very different from the institutions we know today. □

Developing and Monitoring Heritage Tourism in Alberta

by Mark Rasmussen, Alberta Culture & Multiculturalism

Heritage is becoming big business in Alberta. Development of heritage facilities has changed the face of tourism in the province, bringing visitors into non-traditional tourism areas.

In an effort to diversify, decentralize and strengthen its economy, Alberta has made major investments in a network of heritage attractions to stimulate this additional tourism. Over the last decade, the government has spent over \$120 million developing a network of thirteen new provincial heritage facilities, in addition to four existing facilities now valued at over \$50 million. In 1989, 1.4 million visitors came to these facilities, a figure expected to reach nearly 2 million by 1993 with the opening of two more museums.

While this is a popular investment, which instills local pride and offers tangible educational experiences to Albertans, its success in stimulating regional economies has been the real

force in securing the system. Put simply, these attractions are generating new tourism dollars that equal their capital costs in short periods of three to seven years.

To measure the return on its investment Alberta Culture and Multiculturalism initiated an economic impact assessment project in 1986. It has developed a standardized comprehensive method for gathering visitor profile information and evaluating the regional economic and employment impacts of provincial heritage facilities.

The most dramatic is the \$28 million Royal Tyrrell Museum in Drumheller, whose 500,000 visitors in 1989 meant \$7.5 million to the regional economy, a figure expected to rise to \$10 million this year. The 140,000 visitors to the \$10 million Head-Smashed-In Buffalo Jump World Heritage Site near Fort Macleod, generated \$2.1 million in 1989, and visitors are expected to produce \$2.8 million in business for the regional economy this year.

Continued p. 7

Figure II

Characteristics of Visitors to Alberta's Network of Heritage Attractions

