FOCUS ON
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The Canada Council Looks to the Future with Cultural Data

Claire McCaughey, Head, Research and Evaluation Section, The Canada Council

To better respond to the challenges facing the arts today, and to plan for the future, the Canada Council, the national funding body for the arts in Canada, initiated a formal long-range planning process in 1989. An integral requirement of this process is solid data on the arts, including the finances of arts organizations, the status of artists and cultural workers and the health of the sector as a whole.

One of the important uses of the data in the planning process is to analyze long-term trends. The Council is able to obtain data on the performing, literary and visual arts organizations that it funds through Statistics Canada's annual **Performing Arts, Book Publishing, Periodicals,** and **Heritage Surveys.** The Council began by focusing on the performing arts (performing arts companies received about one half of Council's total grants of $88 million in 1990-91). While Statistics Canada provides data from its surveys in publications and special analyses, the Council has requested long-term data on only the companies it funds. The special data series thus obtained from Statistics Canada's **Performing Arts Survey** currently spans the 1980s to 1990, and will be updated annually. It includes most of the performing arts companies fundedby the Council. In 1990, the data series represented the activities of 241 companies: 29 ballet and modern dance companies, 45 orchestras and chamber groups, 9 opera companies and 158 theatre companies.

The Council has been able to tap into this wealth of performing arts data to develop the aggregate time-series data it requires. These include the finances and attendance and performance figures for dance, music, opera and theatre companies, and for performing arts companies by province and major urban area. Future work will focus on profiling small, medium and large companies. The data provide a unique portrait of performing arts companies funded by the Canada Council during the 1980s that exists nowhere else. The analysis will be published by the Council in the near future to make the data available to the arts community.

Long-term Trends in the 1980s

Through data on its client companies from the Performing Arts Survey, the Canada Council is able to analyze long-term trends. The data have been aggregated by Statistics Canada to suit particular needs, including various discipline, geographic and size breakdowns.

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In This Issue...

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Note of Appreciation
Canada owes the success of its statistical system to a long-standing cooperation involving Statistics Canada, the citizens of Canada, its businesses and governments. Accurate and timely statistical information could not be produced without their continued cooperation and goodwill.

As the data reveal, the 1980s was a decade of growth. The number of performing arts companies funded by the Council increased as many new modern dance, theatre and other performing companies appeared on the scene. Audiences grew with attendance increasing from 8.5 million in 1980 to 11.6 million in 1989. There was especially rapid growth in young audiences, which in 1989 made up 3.4 million or 29% of attendance (see Figure 1). Average total attendance per performance increased from 359 to 380, indicating a growing audience for more artistic product. Reflecting overall growth, average revenue per company increased by 12% during the decade, even after taking account of inflation.

While more companies were reaching a growing audience, their ability to fund their activities increasingly became a balancing act with greater competition for resources. Whereas rising ticket sales, as well as other earned revenue, such as guarantees and service fees, allowed companies to continue to receive about one half of their revenue from earned sources, the percentage declined from over 50% in 1986 to just under 49% in 1989. At the same time, however, government funding did not keep pace with growth which meant that companies had to turn increasingly to the private sector for support. Corporate support, particularly sponsorships, grew from 4% of revenue in 1980 to 7% in 1989, and private support overall from 13% to 17%. Government grants by contrast declined overall from 37% to 35%, mostly as a result of the declining share of Canada Council grants. These fell from 17% of revenue at the beginning of the decade to 13% at the end (see Figure 2).

1990 was a turning point for companies as the early effects of the recession became apparent. Attendance fell from 11.6 million to 11 million. Corporate donations and sponsorships also fell after an almost continuous increase during the 1980s.

The combined effects of the recession and essentially frozen Canada Council grants point towards serious financial difficulties of the sector, which are likely to become more acute in the 1990s. At mid-decade, the combined annual deficit of the companies was $6.9 million in current dollars, or 4% of total revenue. Total annual deficits were lower in the latter part of the decade as the recovery occurred from the recession of the early 80s. And, in fact, companies reported overall a surplus in 1988. But by 1990, annual deficits had increased again to $7.3 million. Although deficits were not yet as serious a

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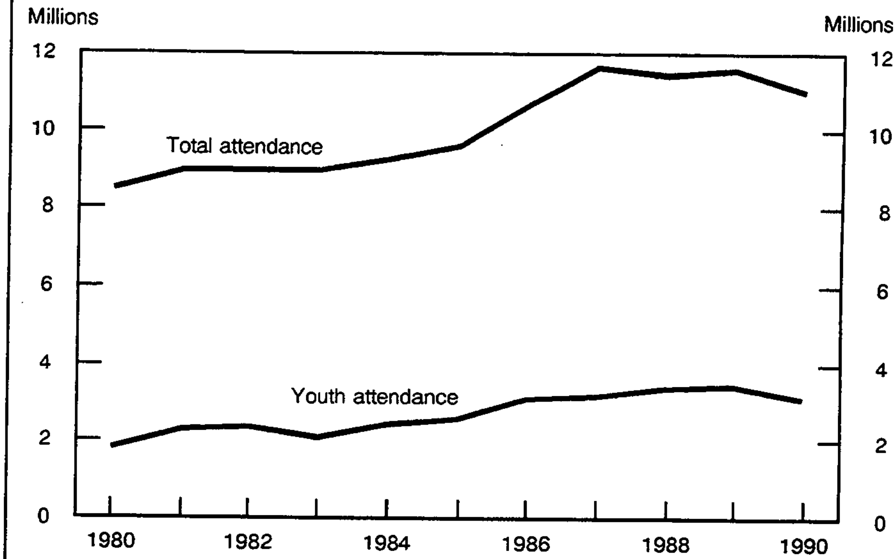
Figure 1

Performing Arts Companies Funded by the Canada Council, Total Attendance and Youth Attendance, 1980 to 1990

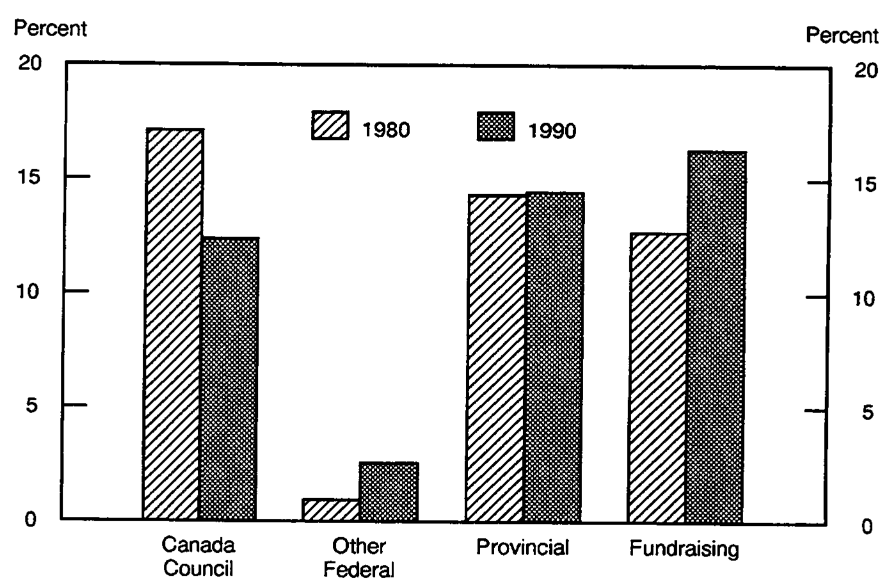


Source: Canada Council Special Data Requests from the Performing Arts Survey, Statistics Canada

Figure 2

Performing Arts Companies Funded by the Canada Council, Selected Sources of Revenue, 1980 and 1990

All Disciplines



Source: Performing Arts Survey, Culture Statistics Program, Statistics Canada problem as they were in the mid-1980s, the full impact of the recession is not measured in 1990 data. Accumulated deficits, at about $20 million in 1990, represent a serious and growing problem for performing arts companies.

Dance, music and theatre companies experienced overall annual deficits, while opera companies fared relatively better by posting an overall annual surplus in 1990. Dance, music, opera and theatre companies also vary in the degree to which they depend on different sources of revenue. Dance companies, for example, garner a smaller share of total revenue from earned sources than other disciplines. Earned revenues make up 37% of revenue for dance companies compared with 43% for opera, 47% for music and 55% for theatre. Dance companies also differ from the other performing arts companies in that they go on tour to a far greater extent.

Opera and music organizations receive a higher share of income from private sources, including corporations, foundations, individuals and special events. Opera companies receive 24%, followed by music (orchestras and chamber groups) at 20%, dance at 18% and theatre at 13%. Opera companies obtain the largest share of support from individuals (7% of all revenue) of all the performing arts and support from individuals makes up the largest share of their private support. For music organizations sponsorships are the most important source of private support (8% of all revenue).

The Challenges of the 1990s

Although it cannot yet be fully gauged, the recession of the early 1990s is likely to have had a very significant and negative impact on the finances of Canada Council-funded performing arts companies, both at the box office and among sources of private support. Government grants, in particular Canada Council grants, have been frozen for many companies in recent years. A challenge of the 1990s for performing arts companies will be to hold on to existing audiences and reach out to new ones. For this reason the growth in youth attendance during the 1980s should be seen as a potentially positive sign for the 1990s. A critical challenge for performing arts companies will be to seek out and develop new sources of support from the private sector.

Through the use of data from Statistics Canada's Performing Arts Survey, the Council will be able to continue to monitor these trends into the 1990s. It will also be working with data from the other culture surveys of Statistics Canada to build up a comprehensive long-term profile of arts organizations, artists and audiences. These include the Book Publishing Survey, the Periodicals Survey, the Heritage Survey, the Arts and Culture Supplement to the General Social Survey and the recently announced Cultural Labour Force Project. ☐

The Balance of Trade in Canada's Cultural Industries

Michel Durand, Chief, Cultural Industries Section
Judy Reid, Analyst, Cultural Industries Section

Canada's size, small population and proximity to the United States make it an unusual marketplace. Most books, films, recordings and broadcast entertainment products (series, drama and feature films for TV) sold in Canada come from outside the country, mostly from the United States. American firms located in Canada benefit from the profits of their exclusive distribution business, with little or no risk in distributing the popular, "mass appeal" U.S. films, books, and recordings. But despite this reality, export and import patterns have shown some notable changes over the last decade.

Market Share of Foreign-Controlled Firms

Foreign-controlled companies continue to account for a substantial portion of earned revenue, but recent data suggest their market share is changing.

Their share of film and video revenue, for example, has declined significantly in the last decade. In 1989-90 they held 59% of these revenues (including 86% of the theatrical market, 54% of the TV market and 26% of the pay TV and home video markets), compared to 74% in 1982-83.

Other notable highlights over the same period include:

- a slightly smaller share of domestic book sales by foreign-controlled publishers and exclusive agents compared to previous years (42% of their own titles and 53% of agency sales)
- 73% of English-language publishers' textbook sales (both own and agency titles) were by foreign-controlled establishments
- virtually no change in the percentage – 89% – of all record sales in Canada held by 14 foreign-controlled firms.

Canadian Content Market Share Holding Its Own...

What has happened to Canadian content in the last few years, given the influence of foreign-controlled companies on Canadian culture?

Canadian drama made up 14% of total drama programming in 1989, more than double the 6% it represented in 1984. Over half of variety and game shows were Canadian in 1989, compared to 42% in 1984.

Canadian films and videos still earn only a small share of distributors' total income: about 9% of distribution revenue in 1989-90, compared to 7% in 1984-85.

With 4% of revenues in 1989-90 – the same as in 1984-85 – Canadian theatrical films were holding their share of revenues from movie distribution, but making no gains.

Continued p.4

As a proportion of total revenue from distribution of home entertainment films, those with Canadian content showed only a slight increase, rising to 10% of the total in 1989-90 from 9% in 1984-85.

The picture for broadcasting was even less bright. In 1989, 54% of the viewing hours of documentary programs had Canadian content, a substantial drop from the 71% they represented in 1984.

Between 1984 and 1989, only 5% to 6% of comedy programs were home-grown Canadian humour. And, at 11% of total sales in 1989-90, the percentage of Canadian content in the record, tape and compact disc industries has shown little change over the years.

...While Demand for Canadian Content Products Continues to Grow

Canada is paying more for imported products trough increased royalty payments, and both Canadian and foreign players are competing for the higher profit margins associated with the distribution of imported cultural products. So it is quite remarkable that sales of Canadian-produced books, records and films are growing relatively quickly. The data (in constant 1984 dollars) show:

- Revenue from Canadian publishers' own books, periodicals, newspapers, and Canadian films and records increased by 36% from 1984-85 to 1989-90, to reach $1.9 billion in 1989-90.
- Volume sales for Canadian publishers' own books increased from $459 million in 1984-85 to $680 million in 1989-90, a 48% increase.
- Sales of Canadian periodicals increased by 27%, from $182 million in 1984-85 to $232 million in 1989-90.
- Canadian newspaper sales totalled $533 million in 1984-85 and $586 million in 1989-90, a 10% increase.
- Canadian film and video producers increased their 1984-85 production revenue of $231 million to $445 million (constant dollars) in 1989; this represents a 93% real increase.
- A real increase of 18% brought sales of Canadian content recordings to $33 million in 1989-90 from $28 million in 1984-85.

Canadian Products in Foreign Markets

Increased penetration of foreign markets is one avenue Canadian firms can explore to increase their sales outside the small domestic market. In fact, although its value is small in relation to total sales in Canada, the export market is growing:

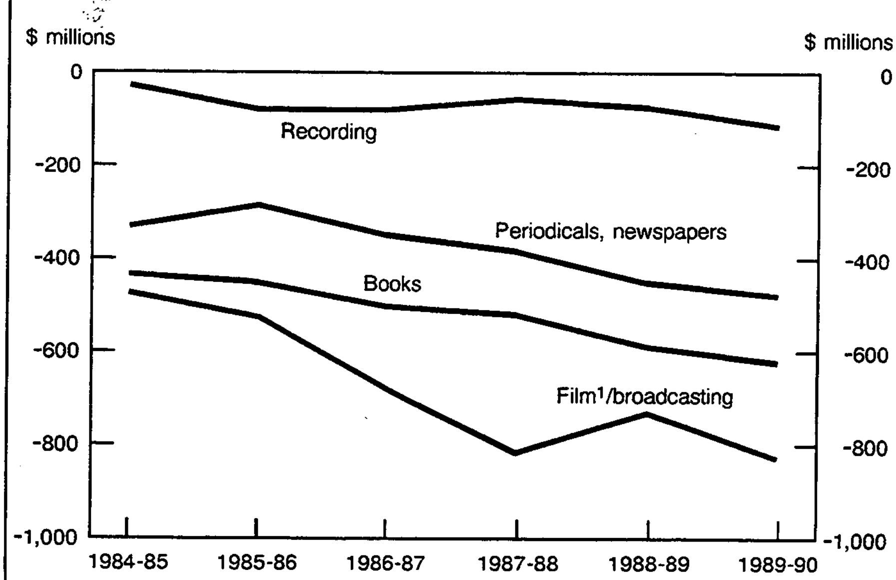
- Data show that sales of exported cultural products almost doubled through the 1980s, reaching $238 million in 1989
- Export sales of TV programming increased from $17 million in 1982 to $24 million (in 1982 dollars) in 1990, an overall hike of 41%.
- Film and video exports by distributors and producers increased from $18 million in 1981-82 to $96 million (in 1981 dollars) in 1989-90. Even two years earlier, these exports stood at only $33 million (in 1981 dollars). On the other hand, exports of records, tapes and CDs fell by more than 50% over the same two-year period, to $12 million (in 1987 dollars) in 1989-90.
- Book exports more than doubled in constant 1981 dollars, to $27 million in 1989-90, from their 1981-82 level of $12 million.
- Monetary transactions (receipts from foreigners for royalties, and licensing costs) were down 14% from 1988 to 1989, to a total of $35 million. Annual increases averaged 10% in previous years.
- Culture-related hardware/software commodity exports amounted to $3.1 billion (in 1988 dollars) in 1989, almost 15% more than in 1988. From 1981 to 1987, these exports increased by 77% in constant 1981 dollars.

Compare these figures to those for culture imports to Canada. Commodity imports (recordings, films, books, newspapers and periodicals) by cultural industries totalled $1.6 billion (in 1984 dollars) in 1989, a real increase of 33% from 1984 to 1989. Payments to foreigners for products from these and the broadcasting industries increased by 32% after inflation between 1984 and 1987, and by 14% after inflation

Continued p. 5

Figure 3

Balance of Payments, Cultural Industries, Commodity Exchange and Monetary Transactions



[1] *Includes film production and distribution*

from 1988 to 1989, to reach $507 million (in 1988 dollars) in 1989. Imports of culture-related hardware/software commodities totalled $8.1 billion (in 1988 dollars) in 1989, up 9% from 1988. From 1984 to 1987, the increase after inflation had been practically nil.[1]

Balance of Cultural Trade

Although exports and domestic sales both show annual increases greater than the rate of inflation, and the value of imports is growing less quickly, Canada still faces a large deficit in its cultural industries. In 1989, the balance of trade between culture imports and exports continued to be significant: $7 billion. Looking at the different categories comprising this total, we see that, on a constant dollar level:

- The deficit for culture-related commodities tripled between 1981 and 1989, to reach $1.6 billion in 1989.
- Since 1981, the deficit for monetary transactions (royalty payments, subsidiary rights) has more than doubled to reach $483 million.
- International transactions of culture-related hardware/software commodities produced a $5 billion deficit in 1989, up 4% from 1988; this deficit recorded a 60% increase between 1981 and 1987.
- During this same period (1981-1989), the Consumer Price Index increased at an average annual rate of 5.3%.

What Hangs in the Balance?

While foreign-controlled firms continue to be the dominant force in culture industries in Canada, a declining deficit in the balance of cultural trade is a significant change. Some Canadian-produced commodities continue to find and expand their market niche and Canadian content, while not making overwhelming gains, is holding – and sometimes increasing – its ground. ☐

[1] *A major revision of commodity import/export classification to the Harmonized System (HS) of classification took place between 1987 and 1988: therefore data for these two periods are not comparable. More information on concordance between the two classification systems is available upon request.*

Special Announcement

Library statistics users will be disappointed to learn that, due to 1992-93 budget reductions, the Culture Statistics Program's annual **Survey of Public Libraries** has been suspended. This is one of our oldest surveys, providing useful information to the library community and cultural policy makers and planners since 1921.

The 1988 report of the National Library's Task Force on Canadian Library Statistics recommended that the survey be expanded greatly in scope to cover libraries at all levels - university, college, school, special. Unfortunately, resources to carry out such an expansion were not forthcoming, and now, in fact, Statistics Canada no longer has the resources to maintain the current survey.

The 1991-92 data will continue to be collected, but will not be analysed or released until funds can be obtained. Meanwhile, the 1990-91 data have been released and the annual publication, **Public Libraries, 1990-91** (Catalogue no. 87-205) is scheduled for release in August. ☐

New Publications

		Price in Canada
87-203	Periodical Publishing, 1989-90	$17.00
87-204	Film and Video, 1989-90	$22.00

Coming Soon

87-208 Television Viewing, 1991 $26.00

Most Recent Data Available

Sound Recording: 1990-91
Periodical Publishing: 1990-91
Film and Video Producers: 1990-91
Film and Video Distributors: 1990-91
Film Laboratories and Post-production Services: 1990-91
Motion Picture Theatres: 1990-91
Public Libraries: 1990-91
Government Expenditures on Culture: 1989-90
Heritage: 1989-90
Radio and Television: 1990
Performing Arts: 1989-90
Book Publishing: 1990-91

Focus on Data

Average time spent watching TV, fall 1990	23.3 hrs/week
Participation rate at regular motion picture theatres, 1990-91	2.9 times/year/ person
Revenue from distribution of film and video productions, 1990-91:	
– Canadian-controlled distribution and wholesaling	$664 million
– Foreign-controlled distribution and wholesaling	$525 million
Average single copy price of Canadian periodicals, 1990-91	
– consumer periodicals	$3.40
– business/trade periodicals	$4.64
Net sales of books published in Canada, 1990-91	$813 million
Market share of record sales, 1990-91	
– vinyl albums	2%
– pre-recorded tapes	56%
– compact discs	38%
Acquisitions of books by public libraries, 1989-90	4.6 million volumes
Performances by performing arts companies, 1989-90	40,555
Federal government spending on culture, 1989-90	$ 2.9 billion
Visits to heritage institutions (excluding nature parks) 1989-90	56.8 million

Spending Our Culture Dollars

Michel Durand, Chief, Cultural Industries Section

Canadians continue to spend a larger proportion of their incomes on cultural activities, particularly those that can be enjoyed at home. But some of this increased spending reflects the rising price of entertainment.

According to Statistics Canada's Survey of Family Expenditures, in 1990 families spent 9% of their income on culture and recreation activities – a 1.2 percentage point increase from 1982 and up 2 percentage points from 1969.

However, the price of entertainment has also risen. According to the Consumer Price Index, costs for entertainment admissions (the performing arts), movies and reading from 1982 to 1990 surpassed the average annual increase in the inflation rate for all items by 61%, 20% and 42%, respectively.

Canadians, then, are spending more on cultural and recreational activities, but are more Canadians actually participating? Various surveys by the Culture Statistics Program show a number of trends.

Spending on At-home Activities Increases

People may, in fact, be going out less often because of economic pressures. Between 1982 and 1990 (in constant 1982 dollars), the largest increases in spending related to home entertainment. From an annual average of $6, families increased their expenditures on video tapes and discs more than ten times to $62 by 1990. Spending on cable more than doubled increasing from $56 to $123.

Expenditures on records and tapes consumed an average $54 of the Canadian family's budget in 1982, showed no increase in 1986 (again, in constant dollars), and then increased by 20% to $65 in 1990. Compact discs (CDs) particularly captured the imaginations and dollars of Canadians, with the number sold increasing about 33% annually between 1988 and 1990. But, as CDs grew in popularity, LPs and cassettes waned, with sales dropping 56% and 13% respectively. Combined shipments of LPs, CDs and cassettes dropped 8% in 1990 over 1989.

Reading, on the other hand, seems to be one activity that is somewhat "recession proof". Surveys on reading habits between 1978 and 1991 show that Canadians' interest in reading for pleasure continues to grow.

While daily and non-daily newspapers had a 3% increase in circulation between 1988 and 1989, Canadian periodicals did not fare as well, reporting a 6% drop in circulation in 1989.

Spending on print media increased as well. In constant 1982 dollars, expenditures on magazines, books and newspapers rose between 1982 and 1990: spending on magazines increased from $41 to $50 per family; the amount spent on books rose from $46 to $55. Canadian families spent an average $106 a year on newspapers in 1990. Textbooks and other printed material showed even larger increases.

Spending on Going Out Also Rises

Canadians continued to attend sporting events, spending $28 in 1990 (up 20% in constant 1982 dollars from 1982 levels). Their outlay for live stage performances was even greater, increasing by 70% between 1982 and 1990 (from $27 to $46 in constant 1982 dollars). Attendance at performing arts events grew as well, by about 3% a year between 1987 and 1989, but a 12% drop was reported for 1990.

From 1982 to 1986, Canadian families spent an average $41 a year to go to the movies, but by 1990, their average annual movie expenditure had risen to $50 in 1982 dollars, an overall increase of 22% over the period. But in fact, fewer people were going to the movies: almost 4% fewer paid admissions were counted in 1990 than in 1989.

Proportion Spent on Leisure Remains Steady

The general increase in spending on cultural and recreational activities reflects pronounced shifts in spending patterns by Canadians between 1981 and 1991. A look at proportions of income spent on food, shelter, transportation and other goods and services offers another perspective.

Percentages of total income spent on recreation, entertainment, education and culture (a more inclusive category used by the System of National Accounts than for the Survey of Family Expenditures mentioned earlier) rose from 10.3% in 1981 to 10.8% in 1991. In comparison, the proportion for food dropped steadily, from 19% to 16%, and shelter costs increased from 20% to 23%. Transportation costs remained at about 13%, whereas the amount spent on clothing and footwear dropped from 7% to 5%. The share consumed by medical and health care services increased almost 1% to 4.5%.

Consumer spending paralleled the growth in disposable income between 1981 and 1991. Growth in spending slowed from 4% in the mid to late eighties to about 1.3% in 1990, and dropped 1% in 1991.

Culture "purchases", like other consumer goods and services, are subject to the vagaries of the economy. When economic pressures ease, Canadians may find themselves with more culture dollars to spend. It will be interesting to see whether they choose to spend on more activities outside their homes, or if they continue to channel culture dollars to home-related activities. □

Still Available

		Price in Canada
87-202	Sound Recording, 1989-90	$22.00
87-205	Public Libraries, 1989-90	$30.00
87-206	Government Expenditures on Culture, 1989-90	$17.00
87-207	Heritage Institutions, 1989-90	$30.00
87-208	Television Viewing, 1990	$26.00
87-209	Performing Arts, 1989-90	$30.00
87-210	Book Publishing, 1989-90	$17.00
87-517	Government Expenditures on Culture in Canada, 1982-83 to 1986-87	$35.00
87-001	Vol. 14 No. 1 Specialization: A Characteristic of Book Publishing	$ 4.90
87-001	Vol. 14 No. 2 Government Expenditures on Culture, 1988-89	$ 4.90
87-001	Vol. 14 No. 3 Performing Arts, 1988	$ 4.90
87-001	Vol. 14 No. 4 Periodical Publishing, 1988-89 in an Historical Perspective	$ 4.90

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Ottawa, Ontario
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For information on products, special tabulations or content of specific surveys, please contact any of the following:

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A Note to Our Readers

The readership survey included in our previous issue drew more than 100 responses, as well as many interesting comments and suggestions. We are very grateful for this response and will use all this information to keep *Focus on Culture* relevant to our users' needs. Many thanks!

The paper used in this publication meets the minimum requirements of American National Standard for Information Sciences – Permanence of Paper for Printed Library Materials, ANSI Z39.48 – 1984.

Publications toujours disponibles

		Prix au Canada
87-202	L'enregistrement sonore, 1989-1990	22 $
87-205	Les bibliothèques publiques, 1989-1990	30 $
87-206	Dépenses publiques au titre de la culture, 1989-1990	17 $
87-207	Les établissements du patrimoine, 1989-1990	30 $
87-208	L'écoute de la télévision, 1990	26 $
87-209	Les arts d'interprétation, 1989-1990	30 $
87-210	L'édition du livre, 1989-1990	17 $
87-517	Dépenses publiques au titre de la culture au Canada, 1982-1983 à 1986-1987	35 $
87-001	Vol. 14, No. 1, La spécialisation: une caractéristique de l'édition du livre	4.90 $
87-001	Vol. 14, No. 2, Dépenses publiques au titre de la culture, 1988-1989	4.90 $
87-001	Vol. 14, N°. 3, Les arts d'interprétation, 1988	4.90 $
87-001	Vol. 14, N°. 4, L'édition du périodique, 1988-1989 dans une perspective historique	4.90 $

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Nous espérons que vous jugerez ce bulletin instructif et utile, et que vous nous ferez part par écrit de vos observations. Veuillez adresser toute correspondance à l'adresse suivante:

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La culture en perspective,
Division de l'éducation, de la culture et du tourisme,
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Immeuble R.H. Coats,
Ottawa (Ontario)
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Une note à nos lecteurs, lectrices

Le sondage auprès des lecteurs et lectrices, diffusé dans le numéro précédent, a recueilli plus de 100 réponses, ainsi que de nombreux commentaires intéressants. Nous sommes très reconnaissants pour tous ces renseignements, et les utiliserons afin de maintenir *La culture en perspective* aussi pertinente que possible. Mille mercis!

Le papier utilisé dans la présente publication répond aux exigences minimales de l'"American National Standard for Information Sciences" – "Permanence of Paper for Printed Library Materials", ANSI Z39.48 – 1984.