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A Site For Your Eyes: Historic Sites in Canada

Erika Dugas, Project Manager, Heritage Institutions Survey

What sites! The array of historic sites in this country, from coast to coast, is remarkable. Fortifications, living museums or heritage villages, canals and historic houses are some examples of the sites across Canada which help us recapture the past and experience the uniqueness of communities in our country.

Sites seen by almost 17 million

The first national historic park, Fort Anne in Nova Scotia, was established in 1917; this was only the beginning. By 1976, 200 "restorations" were reported in the Statistics Canada heritage survey, drawing over 7.8 million visitors. Interest in and exploration of historic sites has continued to increase for tourists and locals alike. The Canadian Travel Survey shows that visiting historic sites is a popular pastime for "get-away" (short-break) travellers, with 17% visiting a historic site or park. Counting both tourist and local visitation, the 368 historic sites in the 1989-90 annual Survey of Heritage Institutions reported almost 17 million visits.

What type of site?

Historic sites are a rich grouping of attractions: they can include sites, buildings, parks, and communities. Responses to the Survey of Heritage

Institutions included community (local interest); human history, archaeology, anthropology or ethnology; fort or military; maritime or marine; science and technology; natural history or natural science; sports or halls of fame; transportation; and other sites. This breakdown reflects the nature of the collections or the theme of the reporting historic site.

From house to church....the sense of community

"Community" is the largest single category, recording 197 historic sites. Most such sites are historic house museums, such as Simeon Perkins House in Nova Scotia or Manoir Lebouthillier in Quebec, or historic church sites such as St. John the Divine Church in British Columbia. This grouping accounted for over 53% of the total historic sites in our survey.

Most of these institutions are small. On average, they reported smaller interior areas, lower attendance, lower revenues and less full-time personnel than other groupings. The average interior area was 674 square meters, or about one-quarter that of historic sites in general. While the average number of weeks they were open was close to that of historic sites in

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general, the average attendance, 15,450 visits, was lower. The average operating revenue was about \$139,000 or one-third that of historic sites in general.

Less than one-third of these institutions had full-time staff, the average being one full-time employee. An average of eight part-time persons and 17 volunteers was reported.

Human history sites bring the past alive

The next largest category of historic sites reported was "human history, archaeology, anthropology or ethnology". Included among these 93 sites are what are known as "living museum" sites such as Ukrainian Cultural Heritage Village in Alberta and Kings Landing Historical Settlement in New Brunswick, historic parks such as l'Anse aux Meadows Historic Park in Newfoundland, and also smaller sites focusing on human history themes such as the Log Farm in Ontario or Cannington Manor Historic Park in Saskatchewan.

Overall, this grouping of sites represented larger institutions with higher average operating revenues, higher attendance and more full-time personnel than community museums. They were also open for a longer season (see Table 1), and had the highest average number of volunteers (24).

Not all institutions in this grouping, however, were large. While the average operating revenue of this group was approximately \$610,000, half of these sites had revenues under \$133,000. The average interior area reported was over 4,000 square meters but 50% of the institutions reported less than 400 square meters of interior space. Thus, there are two distinct subgroups in this category.

Ceremonial retreats: fort or military historic sites

There are 44 fort or military historic sites in Canada. Examples in this category

include the Fortifications of Quebec, the Manitoba North National Historic Park and Sites, and Historic Fort York in Ontario.

The average operating revenue of this group is similar to that of the human history grouping, as are the number of weeks open and the number of full-time personnel.

As might be expected at such sites, the area reported was large, with the average interior area being over 3,000 square metres.

Average attendance for military sites was considerably higher than for community or human history sites, with an average of almost 126,000 visits per institution.

Other Categories

The remaining types of historic sites are grouped into a category including such varied sites as the Yukon National Historic Sites, the Fort McMurray Oil Sands Interpretation Centre in Alberta, certain canalways such as Sault Ste-Marie Canal in Ontario and historic buildings such as courthouses and lighthouses.

Generally, these institutions were larger in size and registered higher attendance than community historic sites. Their average operating revenue was \$220,000, and they employed an average of 2 full-time staff (see Table 1).

Funding: where does the money come from ?

Historic sites reported a total of \$118.6 million in operating revenues; 21% of this amount was earned.

An institution's sources of revenue are largely based on its governing authority. Although institutions with a public governing authority represented 57% of the historic sites surveyed, they received 93% of the total unearned revenues. These unearned revenues were primarily budgetary allocations from their governing authority (e.g. federal historic sites receiving federal funding).

Those institutions with a non-government governing authority revealed interesting patterns. Community and military historic sites (e.g. Murney Tower in Ontario) derived a larger percentage of their operating revenues from provincial funding than other non-government sites, while human history sites indicated a reliance on municipal funding. The "other" group reported the highest percentage of revenues from institutional or corporate sources, and from federal funding. The percentage distribution of operating revenues by source for non-government institutions is presented in Figure 1.

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Table 1: Profile of Historic Sites by Type of Site, 1989-90

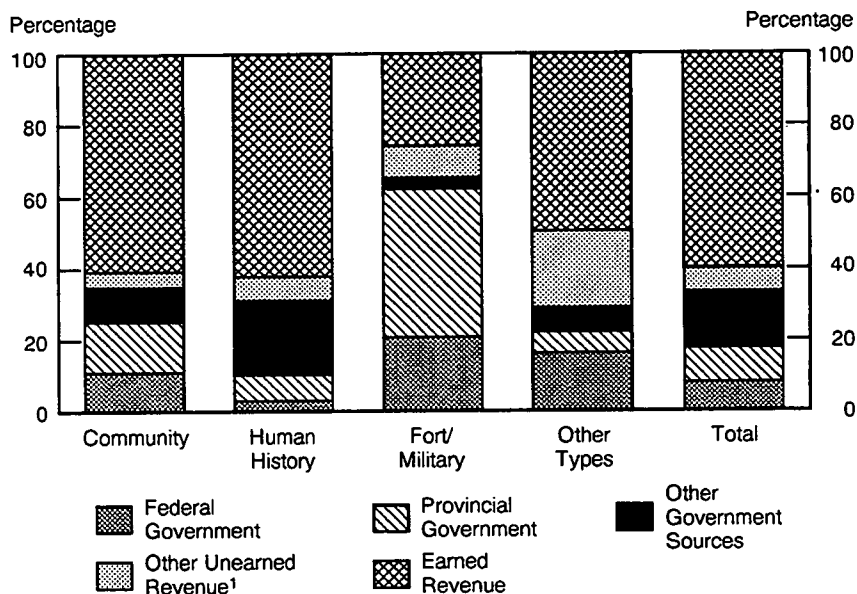
	Type of Historic Site				Total
	Community	Human History	Fort/Military	Other	
Number of institutions	197	93	44	34	368
Average weeks open	26	32	32	29	29
Average operating revenue	139,260	610,389	699,023	220,070	335,995
Average attendance	15,457	76,447	125,935	48,046	46,938
Average full-time personnel	1	8	8	2	4
Average part-time personnel	8	22	22	8	14
Average volunteers	17	24	17	14	18

Historic sites benefit from a variety of granting programs. Since many of them have museum collections, they are eligible for grants from provincial museum assistance programs. Others still may apply for funding from provincial programs for architectural conservation or heritage restoration and conservation. Many foundations or trusts, such as the Manitoba Heritage Foundation, or the B.C. Heritage Trust, disperse grants to historic sites. Likewise, municipalities provide valuable funding. Historic sites also rely, although to a lesser extent, on federal or provincial employment programs.

This brief article cannot do justice to the vast array and diversity of historic sites across the country. They are many and remarkable. For those interested in recapturing our past, what sites for their eyes! ☐

Figure 1

Percentage Distribution of Operating Revenues by Source for Non-Government Institutions, by Type of Historic Site, 1989-90



¹ Includes funds from educational/religious institutions; corporate budget; corporate and foundation grants; and donations.

Everything You Ever Wanted To Know About Arts Consumers ...

**Ronald Holgerson, National Coordinator,
Canadian Arts Consumer Profile, Department of Communications**

- A majority (60%) of Canadians report that they enjoy between 10 and 30 hours of leisure time per week;
- two thirds have attended a live classical or popular performance, two thirds have gone to a movie at least once a year, and just over half have visited a museum or art gallery;
- after going to the movies, attendance at a live performance is the number one cultural activity in terms of frequency of participation of Canadians, followed by visiting a library and touring a museum or art gallery;
- as a result of greater availability, the larger the urban centre, the greater the frequency of attendance and the greater the interest in further activity;
- almost three quarters of Canadians say that their main reason for not going out more often is the expense;

one quarter report that they do not go out more frequently because the kinds of events they are interested in seeing are not available in their area;

- over four in ten Canadians have purchased original visual art pieces within the last five years; those with higher income and levels of education are more likely to buy pieces valued at \$500 and more.

Continued p. 5

Table 2: Factors Influencing Decision to Attend Performances - Comparison of Audience and General Public

	Audience		General Public	
	%	Rank	%	Rank
Piece being performed	91	1	82	1
Company/group of performers	76	2	52	7
Reputation of company/group	75	3	65	3
Price of tickets	75	4	75	2
Word of mouth	68	5	54	6
Facility where production is held	56	6	56	5
Familiarity with performance	53	7	48	8
Desire for an evening out	51	8	61	4
Reviews in media	48	9	42	9

<p>These are but a few of the many highlights contained in Canadian Arts Consumer Profile 1990-91 – Findings, released in May 1992. The Canadian Arts Consumer Profile is the first national survey of current and potential consumers of professional performing arts and visual arts. Intended to form the basis for new marketing initiatives for the arts in Canada, the study was funded jointly by Department of Communications, the ministries responsible for culture in all ten provinces and the cities of Vancouver, Toronto and Montreal. The three year project was carried out by Decima Research of Toronto and Montreal's Les Consultants Cultur'inc inc.</p>	<p>The data were collected through surveys of the general population, and of those attending the performing arts and festivals, and purchasing original visual arts pieces. The surveys were administered in various cycles during 1990 and 1991. Findings presents and analyzes the results of 65,000 questionnaires. The data reflect not only the behaviour of Canadians regarding the arts, but also their attitudes and desires – useful data for those designing marketing strategies. An interesting aspect of this analysis is its presentation of results for various segments of the population, for instance audience compared to the general public, as can be seen in Table 2.</p>	<p>The study is extensive in its coverage of the arts. There are data here on everything from stand-up comedy to opera to avant-garde theatre to performances for children, from paintings to videography, and on consumer motivations, attitudes, intentions and perceptions in all the provinces and the three participating cities. For any researcher interested in the consumption of the arts in Canada, this report will prove to be required reading.</p> <p>More information, as well as copies of the report, can be obtained by contacting Ronald Holgerson, Department of Communications, at (613) 990-4166. <input type="checkbox"/></p>
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The Cultural Labour Force Project Opens Across Canada

Kathryn Williams, Manager, Cultural Labour Force Project

<p>Consultations are the key to the Cultural Labour Force Project.</p> <p>The Cultural Labour Force (CLF) Project has been initiated by Statistics Canada under contract to Canada Employment and Immigration to obtain baseline information on individuals in the cultural sector: their labour market status and patterns, training, financial status and demographic characteristics.</p> <p>Statistics Canada and Employment and Immigration Canada have been consulting the people who know the most about the cultural labour force – the individuals involved in the creation, production, distribution, conservation and support of cultural products such as art, theatre and television. As well, those who provide education to and about the cultural sector are being consulted.</p> <p>The consultations have focused on:</p> <ul style="list-style-type: none"> – how to identify the people involved in the arts, the cultural industries and heritage – the kind of information needed on these people – how to use the data to understand this sector, its employment opportunities and training needs. 	<p>Quite a challenge</p> <p>A private consultant, Thompson Lightstone & Company Limited, with expertise in moderating focus groups and experience in the cultural sector, took on the task of organizing 23 focus groups in 14 centres across the country for Statistics Canada. Focus groups are particularly well suited for the research into issues identification and information needs, and to understanding the motivations, beliefs, attitudes and priorities of a particular group. Members of the cultural community were included as part of the project team to ensure that recruiters and moderators were speaking their language. Through these focus groups, individuals from Statistics Canada, Employment and Immigration Canada and others involved in the project could hear first-hand, without intervening, the honest views of the cultural community.</p> <p>Participants in the groups were selected to reflect the diverse disciplines and organizations within the cultural sector: visual and applied arts, crafts, music, dance, theatre, writing, publishing, recording, broadcasting, film and video, heritage, conservation, libraries, copyright, education and government. It was also important to ensure that as many people with as many kinds and levels of expertise as possible be included – artists,</p>	<p>technicians, administrators and other types of cultural workers, professionals, amateurs and volunteers – from as many groups in Canadian society as possible. That meant seeking English, French and multi-cultural participants, Aboriginal people, persons with disabilities, women and individuals of varying ages and levels of accomplishment.</p> <p>It worked</p> <p>The cultural community was eager to help. Although there was concern about "yet another study of the cultural sector", there was strong recognition of the urgent need for a project that would provide the current, comparable, accurate data on the cultural labour force that is now lacking. In fact, the focus groups across Canada attracted an average of ten participants; a good turnout for a focus group is usually eight people.</p> <p>The depth and quality of information gleaned from the sessions went far beyond what had been expected. The groups identified many issues and the data needed to address them, provided useful information on which people to include in a definition of the cultural labour force, and offered helpful suggestions on the survey design. Personal experiences and</p> <p style="text-align: right;">Continued p. 5</p>
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eloquent explanations of the cultural community's concerns added substantially to the understanding necessary to provide useful information.

A key issue raised by the groups was the sector's complex employment situation where many artists and cultural workers face unstable employment, low remuneration, few employment opportunities, barriers to advancement, poor working conditions and lack of funding, and must deal with the burden of being self-employed, the requirement to move where the work is, and the demand for many different skills. Education and training issues were also a concern: the lack of access to appropriate training opportunities and long-term funding for them; the lack of regional training centres; and the need for more professional development opportunities. The lack of recognition of the cultural sector and the need to illustrate the economic impact of the sector were other issues raised.

The participants' suggestions regarding data to address these issues included:

- labour force status (self-employed, full-time, part-time, etc.)
- historical job patterns and corresponding income
- profiles of occupations in cultural labour force
- the demographic composition of the cultural labour force
- differences by region and demographics
- existing education and training and the demand for and availability of them
- sources of income from cultural and non-cultural activities, funding, sponsorship, etc.
- time spent on creative activities, practice, administration, lobbying, fund raising, etc.
- measurement of the sector's economic impact
- the public's perception of cultural activity
- how economic, social, technological and political changes have affected the cultural labour force

Participants expressed a clear preference for a broader view of the cultural sector. Many different occupations and vocations – from the traditional artists and storytellers, to lighting technicians, booksellers, arts educators and arts policy makers, whether they are professionals, amateurs or volunteers – were mentioned as having a tremendous economic impact that would and should be measured. However, there is a recognized need for a detailed look at certain disciplines, such as dance, where the number of artists and others involved are small.

Associations, unions and artist centres were suggested as organizations that could help identify people in the cultural sector, although it would be difficult to locate everyone through these sources. Participants were confident of the cooperation that these organizations would give. Participants felt that, if there were a clear indication of the goals of the survey and how the results will be used, the cultural community would endorse the project and encourage full co-operation in providing data.

More ideas and detailed explanations are included in the report on the focus groups, which is available through the contacts listed at the end of this article.

The focus groups are only one mechanism for obtaining information for the project. Other consultations have included sessions conducted during the Canadian Conference of the Arts' "CCA Days" in 10 cities across Canada. The CCA Days were partially funded by Statistics Canada and Employment and Immigration Canada.

Consultations on the approach to a survey questionnaire are continuing in order to ensure that the information gathered has been completely understood and that the survey will cover the sector's information needs as completely as the project's budget will allow.

A newsletter is available to anyone interested in keeping up-to-date on the project. You can be placed on the mailing list by calling 1-800-661-2100, Statistics Canada's toll free number for the Cultural Labour Force Project, or by calling Kathryn Williams, Manager of the Cultural Labour Force Project at (613) 951-1517. ☐

Sound Recording and its Environment in 1990-91

Nicole Charron, Project Manager, Sound Recording Industry

It is almost impossible to make an analysis of the sound recording industry without taking into account the international context. The Canadian recording industry has to deal with large multinationals, the popularity of international artists and the fact that the majority of sales involve products of foreign artists distributed locally by multinational subsidiaries.

In recent years, new technology, globalization and the emergence of trade blocks have contributed to the development of international trade. The sound recording industry is particularly affected by this development. This industry has been influenced by the advent of compact disc players, compact discs and digital tapes and by the removal of tariff barriers on record pressing and tape duplication under the Free Trade Agreement with the United States.

The 180 record companies that responded to Statistics Canada's 1990-91 Sound Recording Survey reported a total of 4,665 new releases, including 618 with Canadian content, and sales of \$509 million, of which \$54 million came from records or tapes with Canadian content. This was an increase over the 2,953 new releases and \$401 million in sales reported for 1988-89.

Multinationals

At the international level, the sound recording industry underwent some major transformations as a result of the acquisition of multinationals by large conglomerates, such as Columbia Entertainment (CBS Records) by Sony in 1988 and MCA by Matsushita in 1990.

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A dozen-foreign controlled companies continued to dominate the record industry in Canada, with 89% of sound recording sales in 1990-91, the same percentage as in the previous two years. In addition, their share of new releases increased from 72% in 1988-89 to 79% in 1990-91.

In 1990-91, foreign companies accounted for 43% of all sales of sound recordings with Canadian content, and 29% of new Canadian releases. As in previous years, the major foreign-controlled companies focussed on successful Canadian recordings. Canadian products must adapt to an international context, as they have to compete with foreign sound recordings marketed in Canada by multinationals, who can take advantage of economies of scale.

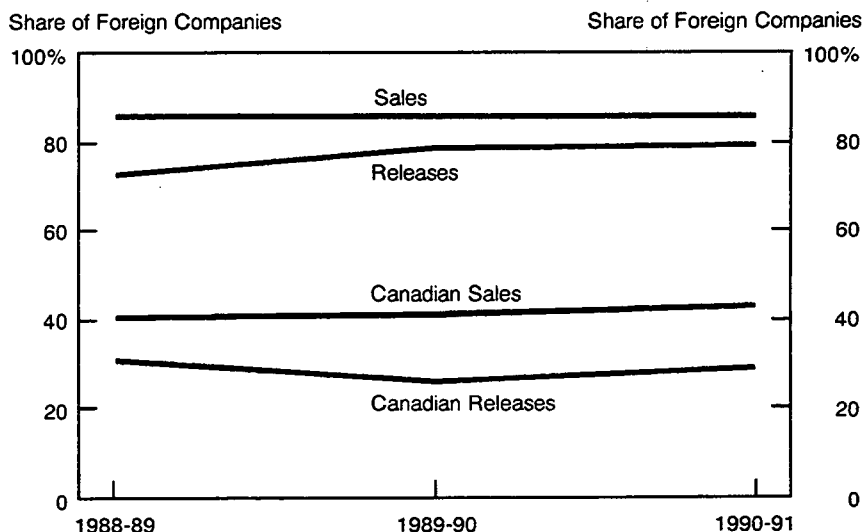
Canadian-controlled record companies marketed and released under their labels 71% of new releases with Canadian content, generating \$31 million in 1990-91, or 52% of their total sales. Many Canadian record companies release recordings by foreign artists under their labels on the Canadian market by obtaining a licence from companies located outside Canada. It should be noted that foreign products account for almost half of the sales of Canadian-controlled record companies, and are often crucial to these companies' survival.

Technology and competitiveness

Compact discs continued to attract new consumers, and their share of total sales increased from 27% in 1988-89 to 40% in 1990-91. Vinyl LPs' share of sales continued to drop, accounting for only 2% of the \$509 million in sales in 1990-91. Tapes' share remained steady around 56%, and singles on various media accounted for 3% of sales. Canadian-controlled companies were slower than foreign-controlled companies in moving to new technology. The 1990-91 figures show that compact discs accounted for 27% of sales of Canadian companies, compared with 40% for foreign-controlled companies. Canadians are spending their ever-shrinking discretionary dollar on an ever-increasing variety of leisure products. Per-family spending on records and cassettes climbed from \$63 in 1986 to \$87 in 1990, an annual increase of 9% in constant dollars (base year 1986), in spite of a drop of 3% in the number of

Figure II

Competitiveness Within the Recording Industry, Share of Releases¹ and Sales by Foreign Companies, 1988-89 to 1990-91



¹ Includes releases in album, tape and compact disc formats.

families buying sound recordings. Part of this increase can be attributed to compact discs, which have a higher cost per unit. This means that Canadians are good sound recording consumers, in spite of the small size of the Canadian market (27 million inhabitants).

Consumers will soon have two more new formats to choose from, the Sony Mini Disc (MD) and the Philips digital compact cassette (DCC). These new formats and

consumers' interest in them will undoubtedly affect the market share currently held by existing formats and the competitiveness of the various industry players. The cost per unit of these new formats will also affect Canadian consumer habits. The latest results of the Survey of Family Expenditures seem to indicate that there are fewer and fewer families buying sound recordings, and that only the most avid music fans are willing to spend more. □

Publication Now Provides Trends on Periodicals

Fidelis Ifedi, Project Manager, Periodical Publishing Project

Now interested readers and researchers do not have to flip through half a dozen publications to have a feel for what is happening in the periodical industry in Canada. Initiatives undertaken during the current fiscal year, 1992-93, have improved data quality and timeliness, and made statistical output, products and services from the Periodical Publishing Survey more relevant.

We have completely revised the publication *Periodical Publishing* (Catalogue number 87-203). Slated for release by the end of September 1992, this publication contains trend data (1986-

87 to 1990-91) on periodicals published in Canada, including domestic market estimates and international trade (import and export) statistics. The publication contains regional/provincial profiles summarizing such vital statistics as:

- total annual circulation
- average circulation per issue
- paid circulation
- number of advertising pages versus text (editorial)
- average advertising rates
- average single-copy and subscription prices of periodicals
- cost per copy

Continued p. 7

- full- and part-time employees, including salaries and wages
- revenues, expenses and profits before taxes.

It also provides statistical profiles based on the language and type or category of periodical.

If you are interested in obtaining this publication, please see this page for ordering information.

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87-001 Vol. 15 No. 2, Performing Arts, 1989-90	\$ 4.90
87-203 Periodical Publishing, 1990-91	\$17.00

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87-202 Sound Recording, 1989-90	\$22.00
87-203 Periodical Publishing, 1989-90	\$17.00
87-204 Film and Video, 1989-90	\$22.00
87-205 Public Libraries, 1989-90	\$30.00
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	Price in Canada
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Public Libraries: 1990-91
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Government Expenditures on Culture: 1990-91

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
Heritage: 1989-90
Radio and Television: 1990
Book Publishing: 1990-91

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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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<p>87-001 Vol. 14, No. 1, La spéciali- sation: une caractéristique de l'édition du livre 4.90 \$</p> <p>87-001 Vol. 14, No. 2, Dépenses publiques au titre de la culture, 1988-1989 4.90 \$</p> <p>87-001 Vol. 14, No. 3, Les arts d'interprétation, 1988 4.90 \$</p> <p>87-001 Vol. 14, No. 4, L'édition du périodique, 1988- 1989 dans une perspective historique 4.90 \$</p> <p>Pour commander des publications composez sans frais le 1-800- 267-6677.</p>		<p>Publications à paraître</p>		<p>Prix au Canada</p> <p>87-208 L'écoute de la télévision, 1991 26 \$</p> <p>87-210 L'édition du livre, 1990- 1991 17 \$</p>		<p>Nouvelles données</p>		<p>Les bibliothèques publiques: 1990-1991 Arts d'interprétation: 1990-1991 Dépenses publiques au titre de la culture: 1990-1991</p>		<p>Dernières données disponibles</p>	
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