FOCUS ON CULTURE

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Cultural Statistics in Australia – The View From Down Under

Barry Haydon, Director, National Culture/Leisure Statistics Unit, Australian Bureau of Statistics (ABS)

Having recently created a statistical unit to develop cultural statistics in Australia, the Australian Bureau of Statistics (ABS) asked me to visit Statistics Canada, primarily to learn about the Culture Statistics Program and to see if its approaches could be introduced in Australia. During my visit at the beginning of May 1993, I was struck by a number of things, the prime ones being the friendliness of Canadians and the well advanced nature of the cultural statistics program in Canada relative to that in Australia. It is indeed a program that we in Australia aspire to.

I found that there were similarities in approach to the various statistical issues facing our respective countries. In particular, the emphasis upon a reliable set of statistical definitions and the continual need to consult with users to ensure the program produces meaningful (both useful and used) output is paramount in both countries.

The ABS Culture-Leisure Industry Statistical Framework

In Australia, the majority of our definitions are based on a statistical framework for culture/leisure statistics developed by the Statistical Advisory Group to the Cultural Ministers Council. This Advisory Group was set up in 1985 to foster the development of statistics in this field before the ABS had become a major stakeholder in future developments. And now that the ABS has made a major commitment to cultural statistics, the Group remains a key player by providing the bureau with indications of priority requirements and by being the major user of the output.

The ABS framework, based heavily on the Unesco Framework for Cultural Statistics, was developed after extensive discussions with the major potential users of any resultant statistics. ABS now has the major responsibility for maintaining the framework in Australia and will adopt a sector by sector approach in this work.

The Sport and Recreation Industry Statistical Framework

One of the categories identified by Unesco and consequently included in the Australian framework is that of Sport and Recreation. Until very recently there has been little official work in this area, but plans are now well advanced for development of a separate, detailed framework for Sport and Recreation, thanks to the efforts of the Commonwealth Department of the Environment, Sport and Territories. The Department has also been instrumental in encouraging the ABS to develop a new survey vehicle – one which will enable small household surveys to be conducted. The first of these will be conducted in August this year and will include questions relating to the Australians' involvement in a variety of

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sport and recreation activities. This area could be one where Australia may be in a position to provide advice to Canada.

Consultation With Users

Apart from lengthy discussions with the Statistical Advisory Group, the ABS has had only minimal contact with prospective users of all cultural statistics at this stage.While we are keen to play a more active role in this area, resources have simply not been available for any extensive consultation work. It is hoped that eventually the ABS will be able to assist more actively the development of all cultural statistics. One of the activities of Statistics Canada is to host meetings of experts from users of cultural statistics, asking them to provide advice about the future direction of the program, and where appropriate, to be involved in joint developments. Perhaps this form of consultation would also be beneficial in Australia.

Measuring the Economic Significance of Culture

One of the fundamental issues facing both statistical agencies relates to the measurement of the economic significance of culture. While in Canada there are numerous surveys designed to measure the economics of various elements of the cultural sector, it has still been considered necessary to undertake a significant investigation into the labour force associated with culture. In Australia, we are nowhere near as fortunate in having statistics on the various economic elements of the industry, but we have recently conducted a household survey which was designed to measure the real level of employment within the culture industry. It will be interesting to compare the results of our respective cultural labour force collections when the data become available.

With the numerous similarities between our two countries and between our two statistical systems I am confident that Canada and Australia will be able to assist each other's statistical development in the future. At the moment, it is likely that Australia will be the major beneficiary of such a relationship, but I am sure that it will not be long before we are able to return the favour.

Figure 1

The Australian Culture-Leisure Industry Statistical Framework

National Heritage
Museums
Zoological and Botanical Gardens
Literature
Libraries and Archives
Music
Performing Arts
Music and Performing Arts Services
Visual Arts
Film and Video
Radio
Television
Community Activities
Education
Festivals and Administration
Sport and Recreation

A Canadian Culture Framework To Build On

Iain McKellar, Assistant Director, Culture

Culture to Canadians can mean anything from Michel Tremblay or the Stratford Festival, to the traditions of a particular group, to the way our society passes on its values. So, setting up a framework for cultural statistics requires a clear idea of what kind of statistics we and others need.

The Statistics Canada framework is being built on the foundation of existing work. Some of the culture-related surveys have a history that reaches back as far as the 1930s, but the current scope of the program, which comprises 12 annual surveys and 3 projects, has gradually evolved through constant dicussion and dialogue with the client community over the twenty years since the Culture Statistics Program was established. In addition, in 1986, in recognition of the the increasing importance of culture, Unesco adopted a Framework for Cultural Statistics, which provides an international context to the collection and comparison of cultural statistics.

Why A Framework?

The role of the framework is to supply consistency and coherency. To be useful, it has to reflect how organizations and industries are doing business now, and how they are likely do so in the future. To achieve this we need common sets of categories, definitions and measures.

Without agreement, we and other jurisdictions would collect information but be unable to make comparisons. We would also find it difficult to relate cultural information to the sociodemographic and economic context.

A Flexible Approach

No matter what form the framework takes, one thing is certain – the segment of the world we are trying to measure is in constant evolution. The framework must be flexible to avoid creating artificial distinctions between institutions that are alike.

We need to know about cultural goods and services being produced, as well as culture consumers, workers and firms. But our information needs go well beyond this. The number of Canadian books being published is important, but their share of the Canadian book market, and the proportion of Canadians reading them are more interesting findings. The number of Canadian feature films is not as critical as their earnings (in various formats), their audience, and their impact on the economy. The cost of running museums has more meaning when put in the context of the cost per visitor.

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Putting the Framework Together

Our framework must help us draw together data from a variety of sources. Basic to our approach is the segmenting of culture into four constituencies:

- the people who make cultural activities possible (cultural labour force)
- the institutions and companies which produce, distribute, retail and conserve cultural goods and services
- the government sector, which supports, regulates, operates or otherwise influences cultural activities
- the consumers who purchase, borrow, use or spend time on cultural goods and services

To organize the information, we are building a supply and demand model. This will allow us to link culture information with Statistics Canada's rich hoards of demographic, social and economic data and to expand the amount of analysis of our data that is possible.

Existing Statistics Canada classifications are not sufficiently detailed for our framework. We need to develop three classifications specifically for culture: one for industries that make up the cultural sector (including those parts of government which are involved); another for occupations which exist in the cultural sector; and a third for cultural goods and services.

We are beginning the project with the classification of industries (Figure 1). An important part of this is work on definitions with other federal agencies, other governments, and with members of the cultural community.

We Can Get There From Here

Of course, we are not waiting for the completion of the framework before getting on with the job. We have used the consultations already held to modify some of our surveys, and we have established an informal check list for all surveys, which ensures we collect, to the extent possible, all the major statistics our users require.

We are also actively involving the provinces and federal institutions interested in culture in a review of the standards and definitions used for cultural statistics across the country. The Bureau de la statistique du Québec has formed a provincial committee for this purpose.

Our aim is to arrive at a common framework which includes accepted definitions of the institutions and activities that make up the cultural sector, so that we can compare information gathered anywhere in the country.

Figure 1

Proposed Components of the Culture Sector Classification of Industries

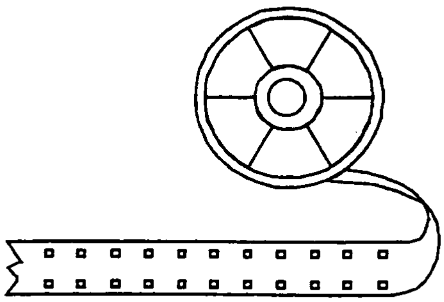
Heritage
Libraries
Performing Arts
Visual Arts
Design
Crafts
Advertising
Publishing
Motion Picture Industries
Broadcasting
Sound Recording
Information Industries
Education
Cultural Associations
Government
Other

Movie Theatres and Drive-Ins Respond to Changing Entertainment Market

Nancy Ghalam, Project Manager, Film and Video Surveys

The tastes of Canadian movie-goers have undergone a dramatic change since the early 1900's when an evening spent at a majestic movie palace was a gala event. As we enter the 1990's, the home entertainment sector is capturing an ever increasing share of the Canadian film market. This trend is supported by the proliferation of home entertainment alternatives such as videocassette recorders, pay television, specialty channels and cable stations. As a result, theatres and drive-ins have been forced to adjust to rapidly changing consumer preferences.

Today, fewer movie theatres cater to a diminishing number of spectators. In order to remain competitive, theatres are offering a greater choice of films. Between 1987-88 and 1991-



92, the total number of regular theatres in Canada dropped 8% to 620, while the number of screens jumped by 13% to 1,611. At the same time, there were 12 million fewer paid admissions to theatres in 1991-92 than in 1987-88, representing a decrease of 7%.

The real cost of theatre admission has increased marginally, with average ticket price to regular theatres, in constant 1991 dollars, going from $5.40 in 1987-88 to $5.64 in 1991-92.[1]

Drive-in motion picture venues have been hit particularly hard by the changing preferences of film consumers. In 1991-92, there were 103 drive-ins in Canada, down 29% from 1987-88. Paid admissions have also dropped dramatically. Attendance fell 28% between 1987-88 and 1991-92. However, unlike regular theatres, the drop in the number of drive-in venues was accompanied by an equally large drop in the number of screens (26%).

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Despite declining attendance, theatres and drive-ins have experienced a relatively small decline in profitability[2]. Regular theatres reported a profit margin of 11.8% in 1991-92, compared to 13.2% in 1987-88, while the figure for drive-ins dropped from 12.4% to 10.8%.

Remaining profitable has translated into expenditure reductions and employment adjustments. For example, decreased expenditures on salaries, wages and benefits were accompanied by lower levels of full-time employment. Compared with 1987-88, there were 24% fewer full-time positions at theatres and 22% fewer at drive-ins in 1991-92. Nonetheless, this restructuring actually led to a 3% net increase in employment at regular theatres. This was due to the rise in the number of part-time employees, which jumped from 7,091 to 7,794. Total employment at drive-ins, however, fell 15% over the same period.

As new technologies change the face of the film industry, the business share of Canadian theatres and drive-ins is becoming smaller. Nevertheless, the theatre sector appears to be meeting the challenge of remaining competitive in a market which offers a myriad of entertainment choices.

1 *Deflated using the Consumer Price Index*
2 *The profit margin is total revenue less expenses expressed as a percentage of total revenue.* □

Young Canadians Participate in Wide Range of Culture Activities

Claire McCaughey, Editor, Focus on Culture

If life-long interest in the arts and culture is established early in life, then the signs seem positive for young people's future involvement with culture. New data on participation in culture from the 1992 General Social Survey show that young people (defined as those from age 15 to 24) take part in a wide variety of cultural activities both outside and in the home - and their level of participation is often higher than for other age groups. What is more, they are interested not only in popular cultural activities but also the more traditional forms.

Seeking Out Variety in Culture and Entertainment

About three out of ten young people attended professional performances of theatre, music, dance and opera in the previous year. This rate is almost the same as for the group usually thought of as the most active performing arts attenders - those from age 35 to 59. The pattern is similar for visiting museums and art galleries.

Moreover, in other cultural activities outside the home, young people participate more than other age groups. About 40% attended popular music performances in the past year. Twenty-two per cent of 15 to 19 year olds and 16% of 20 to 24 year olds went to a movie in the previous week. However, watching movies at home is even more popular, with 63% of 15-19 age group and 54% of the 20-24 age group viewing movies on the VCR in the previous week. Young people are also more interested in attending professional sports events than older age groups.

What Are They Doing When They're At Home?

Whatever cultural activities young people are involved in at home, television viewing is becoming less important among them.
According to 1992 data from Statistics Canada's Television Viewing Data Bank, young people aged 18-24 are watching on average 18 hours of television per week (compared with an average of 23 hours for the total population) - and the figure for the 18 to 24 group has been on the decline for several years.

On the other hand, more than four out of ten young people reported reading a book for leisure in the previous week, similar to the figure for other age groups. But for 68% of the 15-19 age group and 59% of the 20-24 age group, the last book read was fiction - a significantly higher level of interest than for other age groups.

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Table 1
Participation in Cultural Activities by Age Group, 1992

	15-19	20-24	25-34	35-44	45-59	60 +	Total
In the Past Week							
Reading a Book As a Leisure Activity	47%	45%	40%	47%	43%	44%	44%
Watching Films on the VCR	63%	54%	49%	45%	29%	11%	38%
Going to the Movies	22%	16%	10%	7%	5%	2%	8%
Listening to CD's and Tapes	95%	89%	76%	69%	59%	39%	67%
In the Past Year							
Attending Professional Performing Arts	31%	31%	28%	33%	36%	23%	30%
Visiting Museums and Art Galleries	30%	34%	31%	39%	35%	24%	32%
Attending Professional Sports	45%	38%	37%	35%	27%	15%	31%

Young people also read magazines - about six out of ten in the past week - and this was also similar to other age groups. The only print medium in which young people show significantly less interest than other age groups is newspapers, with 74% of 15-19 year olds and 79% of 20-24 year olds reading them in the past week, compared with 87% for the 45-59 group.

As might be expected, the vast majority of those under age 25 listened to CD's and cassettes - about nine out of ten in the previous week. While still a popular activity among other age groups, the percentage is significantly lower - 69% for those 35-44 and 59% for the 45-59 age group.

Over and above this, young people are also engaged in hands-on cultural activity. This is especially true of the 15-19 group, where 25% undertook art activities such as painting and sculpting and 33% played a musical instrument at home in the previous year. For 20-24 year olds, the percentage was a little lower (16% for art activities and 24% for playing musical instruments), and for other age groups much lower again.

Tomorrow's Culture Consumers

The healthy level of participation in cultural activities is perhaps a result of the efforts of arts organizations in recent years in putting on programs aimed at young audiences. Whatever the cause, the results bode well for the future of the culture sector.

The 1992 General Social Survey: Focus on Time Use and Cultural Activities

The General Social Survey has gathered data every year since 1985 on trends in Canadian society. The 1992 survey focused on daily time use measured through a 24-hour time diary. It also included questions concerning participation in a wide variety of cultural activities over the previous year, month and week. This is the first time specific questions on participation in cultural activities have been asked in the General Social Survey, although time use was the focus of an earlier General Social Survey in 1986. The questions on cultural activities were sponsored by a consortium of federal and provincial users with the objective of obtaining a more comprehensive measure of participation in these activities.

Many different kinds of analyses of consumer behaviour can be undertaken using the General Social Survey data, together with other sources of information on culture consumers such as the Family Expenditure Survey and the Television Viewing Data Bank. □

Culture Spending and Participation by Canada's Immigrants

Judy Reid, Project Manager, Sound Recording Survey

Immigrants have changed Canada in all kinds of ways. While contributing significantly to Canada's economic development, they have also had an impact on culture and the arts. The annual Caribana festival in Toronto and writer Michael Ondaatje who won a Governor General's Literary Award in 1992 are just two examples of this. But what about immigrants' involvement in culture as consumers? This article focuses on Canada's immigrant population - where the immigrants have come from and what their cultural habits are.

Changing Patterns of Immigration

Immigrants made up about 16% of the total population in 1991 (or 4.3 million people), nearly half of whom came to Canada prior to 1971. The number arriving in Canada each year has grown continually from 84,000 in 1985 to 231,000 in 1991, but where they are coming from has changed (Figure 1). According to the Census in 1991, 54% of immigrants came from Europe, while 25% came from Asia. Prior to 1961, 90% of immigrants came from European countries and only 3% from Asia. In consequence, Canada's population is becoming more culturally diverse.

Larger Households, Tighter Budgets

There is a tendency for immigrants to live in multiple-family and extended-family households. Household income for immigrants born in Asia was actually 3% more than the average for the total population. Those from the Middle East, Africa, the Caribbean and South and Central America had household incomes 13% less than the overall average.

For immigrants, a slightly higher percentage of household income is spent on basics such as food and shelter. Immigrants from Southern or Eastern Europe or Asia spent about 45% of their disposable household income on food and shelter. Immigrants from the Middle East, Africa, the Caribbean, or Central and South America spent slightly more (about 47%). Those born in Canada spent 42% on basics and those born in the U.S.A. and Western Europe, 43%.

Culture Spending and Participation Patterns

According to the 1990 Family Expenditure Survey, those born in Canada and those from Great Britain, the U.S.A. and Northern or Western Europe (immigrants who also tend to have lived longest in Canada) spent a larger share of their disposable income on culture- and recreation-related items than recent immigrants from Asia, the Caribbean and Central and South America. Data from the 1992 General Social Survey paint a similar picture regarding differences in participation in cultural activities.

But there was one area where recent immigrants (those from Asia, the Caribbean and Central and South America) spent more on culture and recreation. They spent on average $362 on home entertainment equipment compared with $228 for those born in the U.S.A., Northern and Western Europe, and $327 for those born in Canada. While the differences are not as large, viewing habits in a typical week are consistent with this. Forty-two per cent of those born in Asia and 46% of those from Central and South America or the Caribbean viewed a movie on the VCR.

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This compares with 40% of those born in Canada. European-born immigrants viewed considerably less (31%). Recent immigrants working long hours generally tend to see this as the easiest way to provide relaxation for the whole household. They may also want to view videos in a variety of languages.

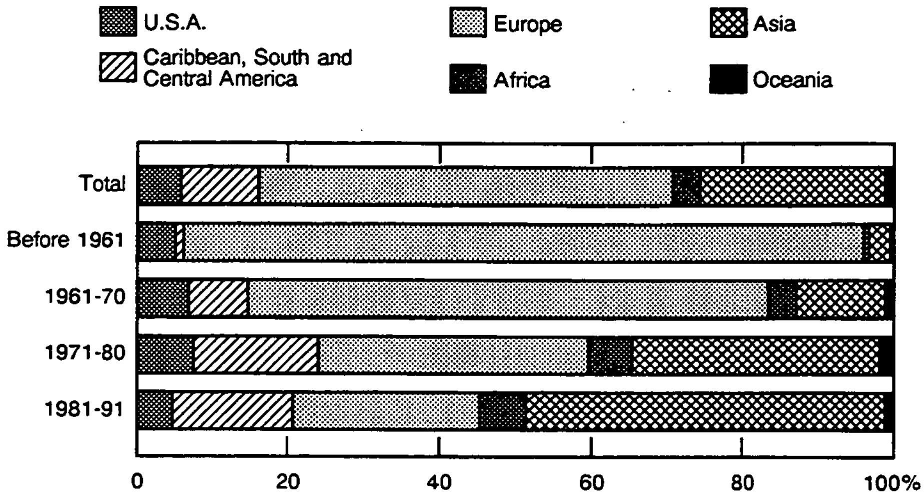
Recent immigrants spent considerably less of their household disposable income on reading materials. Immigrants from Southern or Eastern Europe spent $194 and those from Asia $195. This compares with $283 for those born in Canada. There are also differences in leisure reading habits. Some, but not all, recent immigrants read books as a pastime less: 37% of those born in Asia compared with 44% of those born in Canada read a book in the past week. Fifty-three per cent of those from Central and South America and the Caribbean read a book in the past week. For some immigrants, in particular those born in Asia, the percentage borrowing books from libraries is larger than for those born in Canada (40% vs. 33% per cent in the past year). Immigrants are stretching their culture dollars further by borrowing books. Books in languages other than English and French may also be more readily available in libraries.

Live Stage Performances were extremely popular with those immigrants born in the U.S.A. and Western and Northern Europe ($96 per year). They were much less so with recent immigrants, who spent less than half of that. Those born in Canada spent $68. Participation data also show that 33% of European-born immigrants went to the performing arts compared with 31% of those born in Canada and 22% of those born in Asia. Interest is higher among immigrants in ethnic and heritage dance and music, with 25% of recent immigrants,15% of European immigrants and 10% of those born in Canada attending in the previous year.

Live spectator sports events were more popular with those born in Canada than all immigrant groups, whether recent or living longer in Canada, both in terms of spending and participation.

Figure 1

Immigrant Population by Place of Birth and Period of Immigration, Canada, 1991



1991 Census of Canada

However, the variety of amateur and free sports events common in many immigrant communities are not reflected in the data.

Spending on going to the movies was similar for all groups ($73 to $77 per household) except those born in USA, Northern and Western Europe, where it was $57 per household. Participation rate data also suggest that fewer European-born immigrants went to a movie in the past year (44%) compared with 50% for those born in Canada and 51% of those born elsewhere.

Accommodating Change

If immigration levels remain unchanged, the cultural sector can expect continuing pressure to broaden its focus to become more accommodating of changing tastes. A more culturally diverse immigrant population may begin to insist on greater access to a variety of means of cultural expression.

Further analysis of cultural consumers from different immigrant groups in relation to variables such as age, education, occupation, gender and income level would be useful in this context and can be undertaken with the data sources used in this brief article.

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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.

Update on the Cultural Labour Force Project – Survey Pre-test

Kathryn Williams, Manager, Cultural Labour Force Project

The Cultural Labour Force Project is moving into the testing phase for its two surveys. In order to ensure that questionnaires and survey processes are well-designed, it is essential that thorough testing is conducted.

The major survey, "Survey of the Canadian Cultural Labour Force", will collect detailed information from people involved in the cultural sector who have been identified through their affiliation with associations, unions and councils. It will focus on their labour market status and patterns, training, financial status, demographic characteristics and other issues pertinent to the cultural labour force. Testing of this survey is scheduled for this winter.

The other survey, "Working in the Cultural Sector", will focus on people in the general population who report they are involved in the cultural sector. It is intended to cover some aspects of employment and training in the culture sector, and will provide a more accurate estimate of the size of the sector. Testing of this survey is scheduled for the fall.

Each test will involve collecting data from a small sample of people (approximately 500). If all goes well, the full collection of data for "Working in the Cultural Sector" will occur in January and collection for the "Survey of the Canadian Cultural Labour Force" will occur in April and May. For more information, call the Cultural Labour Force Project toll-free number (1-800-661-2100). □

Tuning in to Canada's Public Broadcaster

Ever wondered how many Canadians tune in to CBC in a typical week? According to new data on participation in cultural activities measured over the entire year (see box on page 5), 16.8 million or 79% of Canadians aged 15 and older reported in 1992 that they watched CBC English and French Television in the previous week. There were 3.6 million heavy viewers watching 10 or more hours in the week.

CBC/Radio Canada radio listeners numbered 6.6 million in the previous week, about 31% of the population aged 15 and over. Heavy users of CBC Radio (10 or more hours in the week) totalled 1.5 million.

For more information on the data, please contact Claire McCaughey at (613) 951-1562. □

Guide to Data from the Culture Statistics Program

Regular Surveys	Latest Available Data
Sound Recording	1991-92
Film and Video	1991-92
Government Expenditures on Culture	1991-92
Heritage Institutions	1991-92
Television Viewing	1992
Radio Listening	1992
Performing Arts	1991-92
Book Publishing	1991-92
Periodical Publishing	1991-92
Culture Sector Special Analyses	
Economic Impact	1991
Culture Balance of Trade	1991
Census Cultural Labour Force Data	1991
Consumer Culture Spending	1990
Culture Participation	1992

Publications

New	**Price in Canada**
87-203 Periodical Publishing, 1991-92	$17.00
87-210 Book Publishing, 1991-92	$17.00

Still Available

87-202 Sound Recording, 1991-92	$22.00
87-204 Film and Video, 1990-91	$22.00
87-205 Public Libraries, 1990-91	$30.00
87-206 Government Expenditures on Culture, 1990-91	$17.00
87-207 Heritage Institutions, 1990-91	$30.00
87-208 Television Viewing, 1991	$26.00
87-209 Performing Arts, 1990-91	$30.00

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