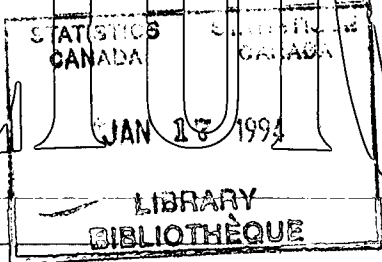


CULTURE



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Canadian Sound Recording Industry Looks at Impact of New Technology

Brian Chater, President, Canadian Independent Record Producers Association

The Canadian sound recording industry in 1993 resembles the current economic situation in Canada as a whole. Operational costs continue to rise, very often as a result of tax increases. And, at least according to preliminary industry data, sales are generally flat or very slightly ahead after three years of stagnant or declining sales. In addition, rapid advances in technology today are challenging both the traditional way music is recorded and the way it is distributed to consumers (see box). The industry must explore how best to utilize these changes for its benefit. There is also the problem that the change of the industry to one based on rights rather than sales of physical product continues to be impeded by the lack of any clear action on the passage of a modern, effective Copyright Act that would grant fair remuneration to rights' owners.

Task Force Set Up

To this end, the Minister of Communications announced earlier this year, the formation of a Task Force to study the Canadian music industry with a mandate to analyze and report on the impact of technological changes and trends on the industry and to look at the consequences that these new technologies will have on all aspects of the industry, including production, marketing, distribution and retailing, and on consumer views and buying decisions.

At the same time, it will investigate the impact of government policies and legislation on the industry as a whole. Given the nature of the recording business, the study will encompass not only what is happening in Canada but will review actions and policies and industry reactions on many major foreign markets. By the middle of 1994, the task force hopes to report to the Minister its detailed recommendations on policy to ensure the long-term viability of the sound recording sector in Canada.

Canadian Artists – Ensuring Future Success Stories

In today's record industry, as with other Canadian cultural industries, the vast majority of distribution is undertaken by foreign-controlled companies (the majors). In fact, the face of these majors has changed significantly over the past few years as mergers and acquisitions have resulted in the consolidation worldwide of just five or six major multi-media conglomerates. However, in the music industry, unlike some of the other cultural industries, these foreign-controlled companies are active in the production of Canadian artists and compete directly with the independent sector to sign new Canadian talent.

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The success of Canadian artists in markets around the world continues to increase and revenues from abroad continue to grow steadily year after year. Major artists such as Bryan Adams and Roch Voisine continue to sell in great numbers, but even more encouraging, is the fact that many newer Canadian acts are making their mark abroad, such as Holly Cole in Japan.

The issue of Canadian content (Figure 1) is critical to the future of the Canadian sound recording industry. There is little doubt that there are potentially major changes to Canadian content in the wind with the advent of new technologies. However, at present, it is difficult to adequately assess their impact until the policies of the CRTC regarding the future regulatory environment are made clearer.

Updated Statement on Copyright Needed

The most pressing concern expressed by the industry today is the swift passage of an effective, modern Copyright Act that will contain mechanisms to update it regularly in the face of the constant technological advances that continually threaten the viability of the music industry. While proper funding and training programs are no doubt important, the fact is that if creators cannot obtain just reward for their labours, then other programs are not needed: there will be little desire to produce and market product in Canada if there is no realistic expectation of a fair payment for creators from users. Industry analysts believe that a modern, effective, Copyright Act that protects creators' rights, could lead to a thriving industry, driven by independent entrepreneurs utilizing the new technologies to the fullest extent.

As technology continues to advance at a faster and faster rate, this will obviously have a major effect, not just on distribution methods, but also on all products and marketing. It is hard to predict exactly what changes will ensue, but clearly, the past is not the future.

Correction :

Re "Movie Theatres & Drive-ins Respond to Changing Entertainment Market" (*Focus on Culture* Autumn 1993): There was a 15% decrease in paid admissions to theatres between 1987-88 and 1991-92, contrary to the reported figure of 7%.

New Technologies in the Music Industry - The Coming Revolution

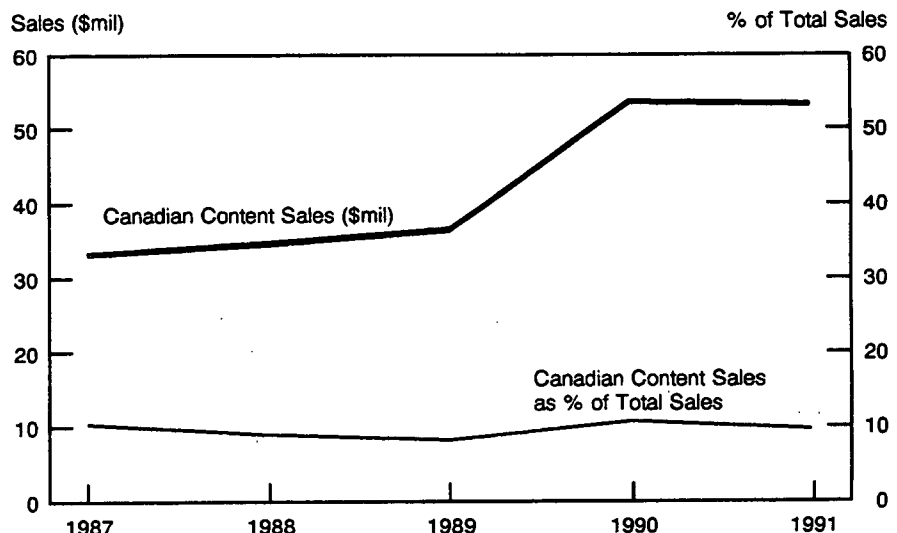
According to Nicholas Negroponte, of MIT's Media Lab, the introduction of new technologies may revolutionize the music and broadcasting industries. The digital technology that has been used in the production of the CD now threatens to eliminate the need for a standard packaged format (CD, tape, etc) to deliver recordings to consumers. While today, digitalized information is transferred to CDs, shipped to retail outlets and carried home by the consumer, it could also be transferred to homes directly through phone lines, cable or satellite. In the future, record companies could potentially trade in their shipping departments for fibre optic delivery systems

and central databanks. Audio (and visual) wares would be provided over phone wires, revolutionizing the existing distribution and retail systems.

Although electronic delivery of recordings may be a little way off in the future, earlier this year two companies applied to the CRTC for licences to offer digital pay-audio service. The proposed service would offer mainly non-Canadian commercial-free music programming with CD-quality to cable TV subscribers (via satellite-cable delivery) at a low cost. Availability of such a service has implications for copyright holders as well as for the future of Canadian content.

Figure 1

Sales of recordings with Canadian content climb, Canadian content share of all sales stable*



* Sales of recordings manufactured in Canada

The Ups and Downs of Government Spending on Culture

Norman Verma, Project Manager, Government Expenditures on Culture

New 1991-92 data show that federal government expenditures on culture fell in current dollars for the first time, and in constant dollars (after inflation is taken into account) for the second

consecutive year. Spending, at \$2.9 billion, represented a decline of 4%, following the previous year's decline of 5%.

Continued p. 3

Municipal cultural expenditures also dropped, to \$1.3 billion in 1991-92, a decrease of 2%, after showing growth in spending over the last six years. Provincial and territorial spending, on the other hand, increased to \$1.9 billion in 1991-92, up 4% after having remained fairly constant in the preceding year.

The arts (including performing arts, visual arts and crafts, and arts education) was the only major sector where federal spending was up, growing to \$141 million, a 5% increase. Expenditure on the performing arts alone rose to \$121 million, up about 7% after the substantial drop of 15% in 1990-91.

In fact, spending rose across the board for the performing arts. Provincial and territorial spending in this area continued to grow, reaching

\$149 million, an increase of 17%. At the municipal level, following a decline of 30% in the previous year, funding for the performing arts doubled to \$35 million, attributable largely to increased expenditures on the construction of performing arts facilities in Ontario.

In 1991-92, the federal government devoted two-thirds of its total cultural outlay, or almost \$2 billion, to the cultural industries (including broadcasting, book and periodical publishing, film and video, and sound recording), a drop of 4% from the previous year. Broadcasting, accounting for three-quarters of federal spending on cultural industries, fell 3% to \$1.5 billion.

Provincial and territorial governments, on the other hand, allocated \$1.2 billion, or three-fifths of their total

cultural expenditures, to two areas – libraries and heritage. Provincial and territorial spending on heritage alone grew 5.5% to \$436 million, contrasting with a decline of 4.8% in federal spending on this area, to \$642 million.

Municipal governments spent three-quarters or \$961 million of their 1991-92 total cultural budget on libraries, an increase of about 3% from the year before.

For more detailed information, see our recently released publication **Government Expenditures on Culture, 1991-92**, (Catalogue No. 87-206), or call Norman Verma at (613) 951-6863.

¹ Throughout this article, all percentage changes are calculated after taking inflation into account.

News In The News

John Gordon, Project Manager, Radio and Television

News is one of the hottest areas of television programming. CBC NEWSWORLD has been on the air for almost five years and CNN in the United States has just celebrated its tenth anniversary; several groups have recently made applications to the CRTC¹ to implement additional speciality news channels.

Tuning to each of the speciality news services is still less than half of one per cent of total viewing; however, the growth in recent years has been considerable. Viewing of NEWSWORLD has more than doubled over the four years for which we have data; CNN's increase has been even greater during the same period but its viewing still remains about 10% below NEWSWORLD.

Who's Watching More?

Although both these news services include a variety of other programming in their schedules, the remainder of this article deals only with tuning to news programs, including major public affairs shows². Since most news programming is not directed towards younger audiences, the viewing of children less than 12

years old has been excluded from consideration.

Between 1989 and 1992, there was a 12% increase in the hours of news viewing from all sources (including conventional channels and all cable specialty services). A closer examination of the data, however, reveals that almost all the increase can be attributed to viewers 35 and over. Looked at in isolation, the increase in news viewing for this older-adult group was 20%.

Viewing among teens (12-17) declined both in the percentage who reported at least some tuning to news (reach) as well as in the amount of time spent by those who continued to watch. Combined, these two effects resulted in a decrease in total viewing hours of 21% for anglophone teens and 10% for francophone teens.

Viewing by young adults (18-34) also declined by about 10%; francophone men were the exception. Although this latter group showed a decrease in reach, they reported an increase in tuning per viewer; the result was an increase of 2% in their total viewing hours.

Since teens accounted for only 2% of news viewing in 1992 and young adults a further 18%, the impact of their viewing habits pales in comparison to the patterns exhibited by older adults. Accounting for about 80% of the total hours in 1992, and showing an increase of 20% from 1989 to 1992, it is the viewing of this latter group which most influences the numbers.

Although this 20% increase in total viewing hours did take place, the growth is not all that it might seem; the population of older adults grew about 15% during the same period and, all other things being equal, total hours of viewing would be expected to increase by a similar percentage. In addition, although well over 80% of individuals in this age group (35 and over) do watch news, there was about a five percent decline in the reach over the period. Counteracting this decline was an increase in the average number of viewing hours for those who continued to watch. Taking all these factors into account, the real³ change was a slight increase in total viewing hours (3%-4%) for most groups; for francophone men, the real increase was 9%.

Continued p. 4

Specialty Services or Conventional Channels - Which is Benefiting?

For anglophones, both the availability⁴ and viewing of Canadian⁵ news on conventional channels have remained almost unchanged over the period. In 1992, women reported a reach of 83% and five and one half hours of tuning per week per viewer; the corresponding figures for men are 81% and about one-half hour per week less viewing. Foreign news viewing on conventional channels was also stable.

All of the real³ increase by anglophones came from viewing of specialty services and although they have established an increased presence (due in part to the marketing efforts of the cable companies) only 10% of the anglophone population reported any news viewing on specialty services. It is, however, this small audience segment that has effected the entire 3% increase. Approximately one third of the gain went to Canadian programs. The larger portion of the audience gain which went to foreign programming on specialty services has allowed them to play catch-up with Canadian programming on specialty services. By 1992, audiences for Canadian and foreign news programming on these services were almost equal.

For francophones, the first thing to note is that there are few choices for news in their home language other than Canadian programs on conventional channels⁶; almost 95% of their TV news comes from this source. In 1992, 3% came from foreign programming on conventional channels but this was down from 4% in 1989.

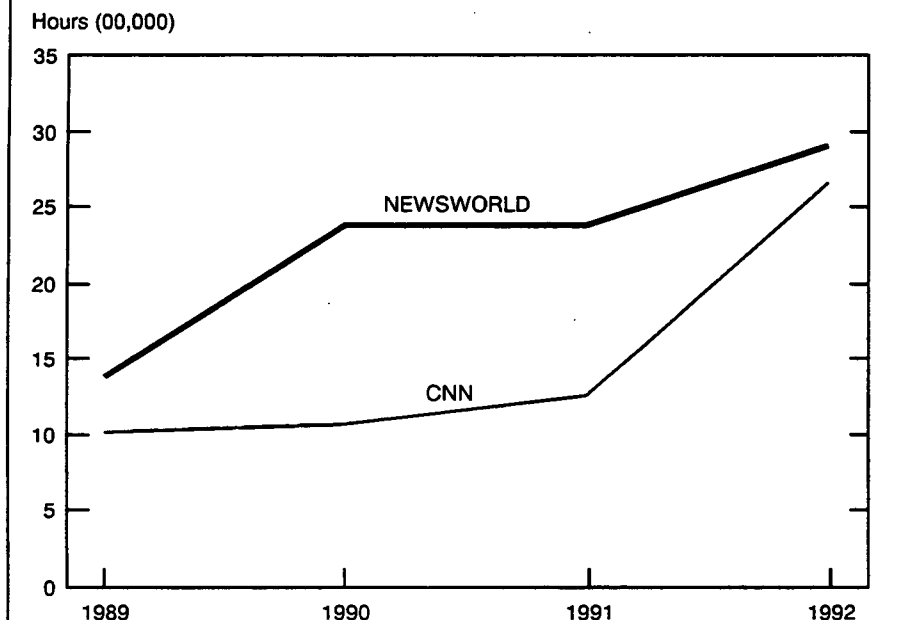
Similar to their anglophone counterparts, francophone women showed a real³ increase of 3% in news viewing. Over 60% of the increase went to foreign programming on specialty services but half of this gain may have come at the expense of foreign programs on conventional channels where a real decline in viewing hours was reported. Here again, the reach of specialty services was relatively low, less than 10% of the population. Francophone women also reported an increase in tuning to conventionally transmitted Canadian news programming.

Francophone men recorded the largest real gain in TV news viewing (9%) and over two thirds of the increase went to Canadian programs on conventional channels; again, foreign programs on conventional channels actually lost some viewing hours. On specialty services, foreign programs gained about four times more viewing hours than Canadian programs.

Have the new specialty services had an effect on TV news viewing? Yes, but only for a small (less than 10%) portion of the population. For anglophones, these services accounted for almost the entire 3% increase in viewing of TV news. For francophones, the tuning to specialty services by a small percentage of the population also accounted for real increases in news viewing but, contrary to the case for anglophones, Canadian programming on conventional channels also profited in increased viewing. If the CRTC licences a French-language specialty news service, will it generate further increases in news viewing or will the gains by conventional channels be lost to the specialty services as seems to have happened in the English-language market? We'll keep you posted.

- ¹ The Canadian Radio-television and Telecommunications Commission is the authority which issues broadcast licences.
- ² The data in this article are drawn from the Television Viewing Data Bank. News programs are almost self defining and include regular local, regional and national news programs. Major public affairs programs include programs such as *Fifth Estate*, *W5*, *Le Point*, and *60 Minutes*. Minor public affairs shows such as *Shirley*, *Claire Lamarche*, and *Geraldo* have not been included in the analysis. It should be noted that these latter programs are included with other news and public affairs programming in the publication *Television Viewing*, Catalogue No. 87-208.
- ³ After allowing for the effects of the population increase.
- ⁴ The hours of news programming available on American and English-Canadian conventional channels has remained almost unchanged over the period covered by this article. There has been an increase in French-language news programming but when increases in francophone viewing are examined at a network level, the changes in viewing levels do not correlate with the changes in news programming.
- ⁵ In this article, the description Canadian refers to programs not the service carrying the program. Although most news and public affairs programs on Canadian conventional and specialty services are Canadian, there are some exceptions such as the *BBC World Service* carried on *Newsworld* and some American public affairs programs carried on Canadian services.
- ⁶ Language of program is not at issue in these analyses but the norm is that the majority of viewing takes place in the home language.

Figure 2
Total Viewing Hours to NEWSWORLD and CNN



Attendance at Heritage Institutions Dips

Erika Dugas, Project Manager, Heritage Institutions

In 1991-92, attendance at heritage institutions¹ fell by 5%, overall, with 54.3 million visits reported. While there were few exceptions to this downturn, the Survey of Heritage Institutions shows that some provinces and institution types were hit harder than others.

Only Newfoundland, P.E.I. and the Northwest Territories reported increased attendance, all between 6% and 10%. Elsewhere visits to heritage institutions dropped, with the province of Manitoba experiencing the sharpest decline at 12%. Decreases in other provinces and the Yukon were of smaller magnitudes, from 2 to 7%.

Attendance was down across all institution types, with the sole exception of planetariums and observatories. Although showing a significant increase over last year (due to the re-opening of an institution which had been closed for renovations), attendance for these institutions did not recover to the level of two years previous.

Attendance at archives took a nosedive for the second consecutive year, with a 10% drop. Also continuing the decline reported in the previous year were zoos and aquariums, the next hardest hit, where attendance dropped 9%, to 6.7 million visits.

Certain institution types showed a marked turn-around from the attendance increases of the previous year. Attendance at exhibition centres and botanical gardens, arboretums and conservatories decreased 8%. Visits to museums, also reversing direction, accounted for the largest decrease in absolute numbers, with 1.5 million fewer visits recorded; just over 23 million visits were reported to museums in 1991-92, for a decrease of 6%.

Historic sites fared better than most other institutions, with attendance down just 1% from the previous survey year, to under 17 million visits.

Other highlights from the 1991-92 survey:

- heritage institutions reported total operating revenues of \$861 million, an increase of 9%, continuing an upward trend.
- earned revenues rose by 3%, to a total of \$172 million; revenues from government sources increased by approximately 8% over the previous survey year.
- operating expenditures climbed 10%, to a total of \$825 million; wages and salaries (including benefits) increased by 7%, whereas all other expenses combined increased by 13%.
- capital revenues decreased by 9%, to a total of \$154 million, a continued downward trend from 1990-91.
- the number of full-time personnel rose slightly (1%), while the number of part-time personnel declined slightly (under 1%). In total, over 10,000 full-time and 13,800 part-time personnel worked in heritage institutions.
- more than 45,000 volunteers contributed their time to heritage institutions across the country, an increase of 5%.

For more detailed information, see our just-released publication **Heritage Institutions, 1991-92**, (Catalogue no. 87-207) or contact Erika Dugas, Project Manager, Heritage Survey at (613) 951-1568.

¹ Nature parks are excluded from this article. Attendance at nature parks in 1991-92 was an additional 55.5 million, an increase of 2% over the previous year. (Note that the attendance figure for 1990-91 was revised to 54.4 million visits.)

Claire McCaughey, the editor of **Focus on Culture** since November 1992, has returned to the Canada Council. She was responsible for the editing of much of this edition. Mary Cromie, formerly project manager of the performing arts survey, has assumed responsibility for **Focus on Culture**, as well as analysis of the data on participation in cultural activities.

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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.



Theatre's Growing Audience – Who's Going?

Claire McCaughey, Editor, Focus on Culture

Canadians' appetite for theatre appears to have increased significantly since the mid-1970s. A comparison of two similar surveys of participation in cultural activities¹ shows that between 1975 and 1992 the percentage of the population 15 and over reporting that they went to theatre in the previous year rose to 23%² from 13%.

It looks as though both not-for-profit and commercial theatre audiences contributed to this trend. Statistics Canada's annual Survey of Performing Arts Companies, which covers notfor-profit companies, shows theatre attendance doubling to 8 million between 1975 and 1992, with the number of companies increasing to 232 from 46.

The commercial theatre sector, not currently covered in the above-mentioned survey, has witnessed huge box office successes, particularly within the past decade, with musicals such as **Cats**, **Les Misérables**, and **Phantom of the Opera**. This, as well as the construction or renovation of large theatre facilities, especially in the major centres, are evidence of an expanding audience for commercial theatre.

What Kind of Theatre?

In the 1992 survey of participation in cultural activities³, data were collected on drama, comedy, avant-garde theatre, musicals and stand-up comedy. An estimated 5 million Canadians 15 years and older went to one or more of these types of theatre in 1992. About 2.4 million took in a musical, 2.2 million a comedy and 1.8 million a drama.

In percentage terms, 11% of Canadians went to a musical in the previous year, 10% a comedy, 9% a drama performance, 6% stand-up comedy, and 1% avant-garde theatre. These audiences overlap somewhat: for example, about a quarter of those who went to a musical in the previous year also went to a drama performance. Patrons of avant-garde are true theatre devotees: though

the smallest group, they were far more likely than any other theatre patrons to go to all the other forms of theatre.

Who's Going?

Theatre does not attract all segments of the population to the same degree. Language, education, household income, age, and to a lesser extent gender, appear to have some influence on level of participation as well as the type of theatre attended (Table 1).

Twenty-nine per cent of francophones, 24% of anglophones and 12% of those whose language spoken most often at home is neither English nor French, went to a theatre performance in the previous year. A much larger percentage of francophones attended both comedy and stand-up comedy than the other two language categories, while a larger percentage of anglophones

than the other two groups attended drama. As a language-based art form, theatre differs from music and dance where the percentages for the three language categories are much more similar.

The percentage of Canadians who went to a theatre performance in the previous 12 months increases quite consistently with household income. Forty-nine per cent of those whose household income is \$80,000 or more went to a theatre performance in the previous year, compared with only half that (24%) for those with household incomes of \$40,000 to \$49,999. Twenty-five per cent of Canadians with household income of over \$80,000 attended musicals, 21% went to comedy and 19% saw a drama performance. For the \$40,000 to \$49,999 income group the comparable figures were 10% for musicals, 11% for comedy and 8% for drama.

Continued p. 7

Table 1

Percentage of Canadians 15 and Over Attending Various Categories of Theatre in the Previous Year, Selected Characteristics, 1992

	Drama	Comedy	Avant-Garde Theatre	Musical	Stand-up Comedy	Total Theatre
Gender						
Men	7.8	9.6	0.9	9.7	6.1	22.3
Women	9.4	10.9	1.0	12.6	5.3	25.7
Language						
English	10.9	7.8	1.0	12.2	2.5	24.2
French	4.9	20.2	0.9	10.2	15.2	29.0
Other Languages	2.7	3.9	--	7.6	4.3	12.4
Level of Education						
Post-secondary	12.7	13.5	1.5	15.4	7.2	32.4
Elementary/Secondary	4.3	7.0	0.3	6.9	4.2	15.4
Age Group						
15-24	9.7	8.1	1.6	10.0	7.2	24.9
25-59	8.9	11.4	1.0	12.2	6.2	25.7
60 +	6.6	8.7	--	9.2	2.6	17.6
Selected Household Income Groups						
\$20,000 - \$29,999	6.7	8.8	0.9	7.1	4.9	19.3
\$40,000 - \$49,999	8.2	11.1	0.8	10.4	7.6	23.8
\$80,000 +	18.5	20.6	1.4	25.0	9.9	48.5

— Figure too small to be expressed.

Level of education is also a factor. The percentage of Canadians reporting that they went to theatre in the past 12 months shifts from 15% for those whose highest level of education is elementary/secondary, to 27% for those with a diploma, to 44% for those with a B.A. For stand-up comedy, the shift varies least, ranging from 4% (elementary/secondary) to 7% (diploma) to 9% (B.A.).

The 15-19 age group shows the highest percentage attendance at drama. This is not perhaps surprising given the widespread availability of theatre for young audiences, including school programmes. The 35-44 and

45-59 age groups have the highest percentages going to musicals, 13% of the former and 14% of the latter. For almost all categories of theatre, the over 60 age group has the lowest percentage attending. If the over-sixties have a preference, however, it is for musicals and comedy.

A slightly higher percentage of women (26%) than men (22%) are patrons of theatre, and this pattern holds true for all categories of theatre except for stand-up comedy.

For information about the data mentioned in this article and to find about other kinds of data available,

please contact Mary Cromie at (613) 951-6864.

- ¹ *A Leisure Study - Canada 1975 and the 1992 General Social Survey.*
- ² *For comparability with the 1975 figures, 1992 percentages are adjusted for non-response. Also note that the 1975 study looked at the population 14 and over, while for the 1992 survey it was the population 15 and over.*
- ³ *The data are from the General Social Survey, which included in 1992 a wide range of questions on participation in cultural activities, as well as on daily time use. The survey collects every year socio-demographic and other data used to monitor on an ongoing basis, social trends in Canada.*

Opera Companies Successful Fundraisers

Marie Lavallée-Farah, Project Manager, Performing Arts and Roberta Sametz

A peek behind the latest numbers reveals some interesting facets of Canada's opera companies.

Data from the 1991-92 Performing Arts Survey show that opera companies have been very successful at fundraising, bringing in over \$9 million of the total \$58.6 million raised in the private sector by all performing arts companies. This represents a full 24% of total opera company revenues, a ratio by far the highest among the four performing arts disciplines of opera, music, dance and theatre. Opera also has the largest average fundraising revenues per company, about \$600,000, an amount more than two and a half times higher than the average for music companies, the next closest discipline.

Even so, opera companies have an average company deficit of \$31,300, a 4% increase over the previous year, with only 6 of the 16 companies showing a surplus in 1991-92. In fact, opera is the only one of the four disciplines with a declining percentage of companies reporting a

surplus over the last four years. During this time period, expenses have been growing slightly faster than revenues.

Competition for the opera-going audience has become keener. Since 1982-83, the number of opera companies has doubled and the number of performances is over two and a half times higher, having risen from 276 to 716. Audiences, on the other hand, have increased by just over one and a half times, rising from 365,000 in 1982-83 to a peak of 572,000 in 1987-88, subsequently dropping, and only in 1991-92 regaining that level again, with an all-time high of 574,000. Nevertheless, even with this ebb in attendance, earned revenues from ticket sales have increased since 1987-88, at an average annual rate of nearly 10% (after inflation, 5%).

Other highlights from the 1991-92 survey, for all four disciplines combined, include:

- The 396 companies staged 35,454 live performances, drawing an

audience of 13.1 million, a 3% decrease in total attendance compared to the previous year.

- Total expenditures increased 2% to \$387 million, while total revenues increased 3% to \$383 million.
- The combined deficits of all companies thus totalled \$4 million, down from \$7.6 million in 1990-91; 54% of all companies reported a surplus.
- Information gathered for the first time shows that more than 17,000 persons contributed their time on a voluntary basis.

Other 1991-92 data highlights for all the performing arts disciplines and comparisons with previous years, can be found in the Performing Arts Indicators supplement in the centre of this issue. For additional information, please see our newly-released publication, **Performing Arts, 1991-92** (Catalogue 87-209), or call Marie Lavallée-Farah at (613) 951-1571.

Publications

New		Price in Canada
87-206	Government Expenditures on Culture, 1991-92	\$17.00
87-207	Heritage Institutions, 1991-92	\$30.00
87-209	Performing Arts, 1991-92	\$30.00
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87-202	Sound Recording, 1991-92	\$22.00
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