



# CULTURE

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## The Canadian film production industry: A regional perspective

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BIBLIOTHÈQUE

The Canadian film production industry experienced an overall drop in production revenue from \$617.3 million in 1990-91 to \$581.8 million in 1991-92<sup>1</sup>. A decline was also reported in 1989-90, when revenues were only \$553.1 million. However, an analysis of film and video production from a regional perspective reveals some positive trends, such as strong growth outside Ontario and a thriving theatrical feature film sector.

Although attendance at movie theatres and drive-ins has dropped over the past few years, the Canadian feature film industry has shown steady progress. The production of theatrical features has increased 65% since 1987-88, to a total of 56 films in 1991-92. Over the same period, the percentage of distribution revenues generated by Canadian films was also up from 4.4% to 6.4%.

The dominance of Ontario film companies has diminished somewhat over the past five years. In fact, in 1991-92, production revenue in Ontario fell to a five-year low of \$272.4 million.

### Production Revenue

#### The Big Three

At present, Ontario, Quebec and British Columbia account for the lion's share of film production revenue in Canada. In 1991-92, independent production companies in these three provinces earned 95% of all production revenue and produced 90% of all Canadian titles<sup>2</sup>.

Historically, Ontario producers have represented well over half of all film and video production revenue in Canada. However, for the first time in over five years, the Ontario market share fell to 47% in 1991-92, down from 53% the previous year. At the same time, five-year trend data show that Quebec, and to a lesser extent British Columbia, are beginning to attract a larger piece of the production revenue pie. Quebec's share of production revenue jumped from

28% to 32% and the British Columbia figure increased from 14% to 16% (see Figure 1).

Consistent with the relative redistribution of total production revenue among the three major film producing provinces, revenue dropped \$50 million in Ontario to \$272.4 million. Conversely, Quebec's revenue was up \$10 million to \$185.9 million, while in British Columbia, the figure rose \$8 million to \$94.6 million.

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For this issue of *Focus on Culture* we specifically selected a provincial/territorial or regional theme for all the articles where this type of analysis was feasible.

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Figure 1

**Ontario share of production revenues decline, Quebec share on the increase**

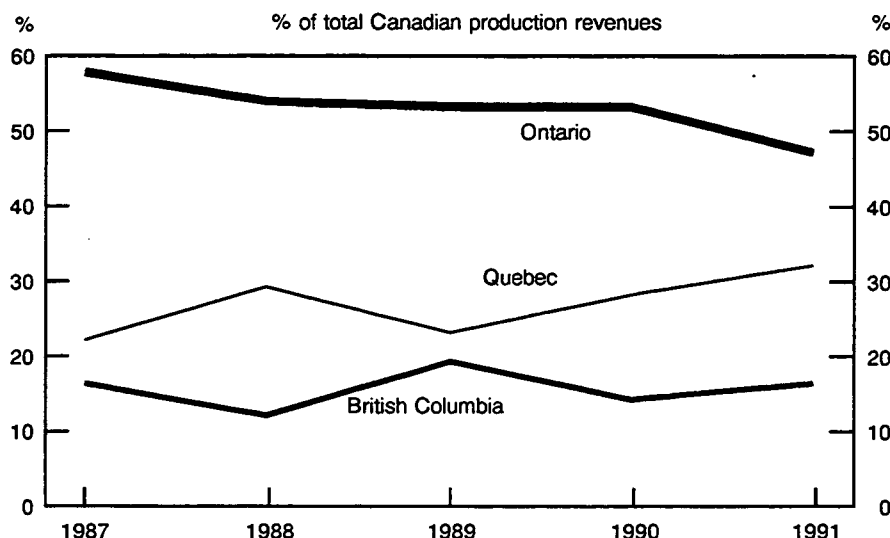


Table 1

**Number of Producers Specialized in Each Market, Canada and Provinces, 1991-92**

Market Specialization	Can.	Atl.	Qc	Ont.	Man.	Sask.	Alta	B. C.
Theatrical	20		9	6	1			4
Television	137	4	62	49	6	2	2	11
Advertising	58	4	17	23		3	2	9
Government/Educational	123	6	32	42	5	5	8	23
Industrial	182	7	75	68	4	1	6	21
For other producers <sup>1</sup>	130	3	52	39	3	1	2	30
No specialization	92	5	39	23	3	6	2	14
<b>Total</b>	<b>742</b>	<b>29</b>	<b>286</b>	<b>250</b>	<b>22</b>	<b>18</b>	<b>22</b>	<b>113</b>

<sup>1</sup> The largest portion of production revenue is generated by work done for other film production companies and executive producers.

### The Prairies and Atlantic Canada

Throughout the remaining provinces, Alberta led the way in 1991-92 with production revenue of \$12.5 million, followed by Saskatchewan (\$5.3 million) and Nova Scotia (\$4.7 million). Production receipts in Manitoba totalled a further \$3.3 million, compared with \$1.8 million in New Brunswick and \$1.0 million in Newfoundland and P.E.I. combined.

Production revenues were up from 1990-91 levels in just two of these provinces: Manitoba and Nova Scotia.

### Specialized Producers

The vast majority (88%) of production companies in Canada are specialized in a single film market (e.g. theatrical feature films, television production, advertising, etc.). Producers are assigned to specialization groups based on the source of the largest portion of their production revenue.

Increasing market fragmentation, such as the growth in specialty television services and pay

TV, does not appear to have affected the proportion of companies specializing in each market segment. Among the provinces, however, producer specialization varies considerably (Table 1), as does the volume of completed productions.

### Theatrical Features

The largest concentration of producers specializing in theatrical features was found in Quebec in 1991-92, with a total of 9 companies. There were another 6 reported in Ontario, 4 in British Columbia and 1 in Manitoba.

The theatrical feature market has been growing steadily in Quebec over the past five years. A total of 38 feature films were completed in 1991-92, up from 30 the previous year and just 13 in 1987-88. Ontario's production in this sector has been relatively steady, despite a slight drop from 15 films in 1990-91 to 13 in 1991-92. Another 3 features were produced in British Columbia, and one each in Manitoba and Alberta, bringing the Canada total to 56 for 1991-92.

Total production revenue earned from distributors of theatrical features fell in Quebec in 1991-92, despite the increase in the number of films completed. Theatrical production revenue totalled \$4.8 million, down from \$7.0 million the previous year, and significantly lower than the \$27.2 million reported in 1988-89. In comparison, Ontario's theatrical production revenue was just \$3.0 million in 1991-92, down from a five-year high of \$7.7 million in 1989-90.

### Television Production

The province of Quebec is also home to more companies specialized in television production than any other province. There were 62 such producers in Quebec in 1991-92, while Ontario reported 49. In Atlantic Canada, three of the four companies which specialized in television production were from New Brunswick.

In terms of production revenue, the television market can be divided into two components: conventional and pay television. Pay television revenues increased quite dramatically in Ontario between 1989-90 and 1990-91, jumping from \$5.4 million to \$27.7 million.

Continued p. 3

This market continued to expand in 1991-92, reaching \$29.3 million. On the other hand, Quebec appears to lead the industry in terms of conventional television production. In 1991-92, this market generated \$92.4 million in revenue (a 9% increase over the previous year), versus just \$35 million in Ontario (a decline of 47%).

However, when considering the percentage of producers specialized in each market segment by province, Manitoba has the largest percentage specializing in TV. Six companies of a total of 22 (27%) earned the largest portion of their production revenue in the television market. In comparison, the percentages for Quebec and Ontario were 22% and 20% respectively.

### Non-theatrical Market

Given that the non-theatrical sector (advertising, government, educational and industrial clients) accounts for 45% of all production revenue, it is not surprising that virtually half of all specialized production companies focus on these markets. In Alberta, the percentage of producers working primarily in the non-theatrical sector reached 73% in 1991-92, compared with a low of 41% in Manitoba. This percentage was also quite high in Atlantic Canada (59%) and Ontario (53%).

Non-theatrical productions, including television commercials, music videos, corporate videos, home videos and educational productions, numbered 8,610 for all of Canada in 1991-92. The Ontario industry share was 40%, followed by 26% in Quebec and 16% in British Columbia. Due to the large percentage of companies specialized in this sector, Alberta also reported a significant market share, accounting for 12% of the total number of non-theatrical productions.

### In Conclusion

This brief examination of regional trends demonstrates the fact that a viable film production industry exists outside of Ontario, despite the prominent role played by producers from this province. Quebec is clearly becoming a major force on the Canadian production scene, while the British Columbia industry holds its own. Smaller provinces are also making their mark on the industry by developing market specialties; note for example, the non-theatrical concentration in

Alberta and the television speciality in Manitoba and in New Brunswick.

For more detailed information, see our recently released publication **Film and Video, 1991-92**, (Catalogue No. 87-204), or contact Fidelis Ifedi at (613) 951-1569. □

- <sup>1</sup> All dollar amounts reported in this article are expressed in constant 1991 dollars. Current dollar figures were adjusted for inflation using the All Items Consumer Price Index for Canada or for the appropriate province.
- <sup>2</sup> A completed production is one for which an answer print or videotape master exists. Each episode of a television series is counted as a separate production.

### Note: Indicators

The Performing Arts Selected Indicators included with the Winter 1993 issue of **Focus on Culture** (Vol. 5, No. 4) contained an error in the left stub headings. A corrected version is included in this issue, as well as new selected indicators in the periodical publishing industry.

## How to Find Out More.....

We hope you find this bulletin both informative and useful. Please write, fax or phone us with your comments:

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## Using the Census to Analyze The Cultural Labour Force

**Kathryn Williams, Manager, Cultural Labour Force Project**

Over the past decade, the growth in Canada's cultural labour force has consistently outstripped that of the general labour force. According to the 1991 Census, more than 300,000 Canadians - from performers and producers to technicians and trainers - are employed in the cultural labour force.

To paint a clear portrait of this unique sector, and utilize fully a data source that already exists, Statistics Canada is creating a consortium of data users to finance the compilation and detailed analysis of census data on the cultural labour force.

This undertaking is part of the Cultural Labour Force Project, whose main goal is to conduct the first detailed survey of Canada's cultural sector. Until the results of this survey are available in November, 1994 (see article entitled "Cultural Labour Force Project Data Collection in May", p. 8), Census data will continue to be the major source of information about individuals working in the cultural sector. In addition, the Census uniquely provides very detailed long-term data, essential for trend analyses.

With the help of its consortium partners, Statistics Canada can create a comprehensive portrait of the demographic, employment and economic characteristics of those employed in the cultural field. Working together to finance this project on a cost-recovery basis, consortium members will have access to the widest possible range of data covering a range of geographic levels: federal, provincial and sub-provincial. By pooling resources, costs per member will be substantially lower than if members were to purchase such data individually and conduct their own analyses.

The results of this study will be invaluable to all levels of government in assessing policy and program development and their requests for any new resources. Non-government organizations will also find the data useful for targeting resources and for planning and research. The results will help with preparation of grant applications, support for market

studies and keeping informed of trends in the cultural sector.

Consortium members will have access to the pre-defined data, tables and analyses agreed on within the project, as well as limited additional customized data and analyses, as

required. A joint publication could be the final product of the consortium.

If you are interested in participating in this Census Consortium, please call our toll free number, 1-800-661-2100. □

## Fluctuations in Government Cultural Spending

**Norman Verma, Project Manager, Government Expenditures on Culture and Roberta Sametz, Chief, Cultural Activities and Institutions**

Canada's recent recession, combined with budgetary restraints, has had a restrictive effect on government expenditures on culture, particularly at the federal level.

In 1991-92, total spending on culture by all levels of government, at \$6.1 billion, dropped by about 1% for the second consecutive year, after having increased by about 3% in each of the two previous years, net of inflation.<sup>1</sup>

The picture at the federal level showed that after a declining rate of growth in spending since 1986-87, the federal cultural budget actually fell by 5% in 1990-91, and by another 4% in 1991-92, to \$2.9 billion. Municipal

cultural expenditures, which had been growing for each of the last six years, also fell in 1991 by 2% to \$1.3 billion.

Moderating the impact of these two declines, spending on culture at the provincial/territorial level rose by a full 4% overall in 1991-92, to \$1.9 billion, after having remained fairly constant in the preceding year.

### Changes by Province and Territory

The distribution of change in total spending on culture by all levels of government was uneven across the country, with some provinces and

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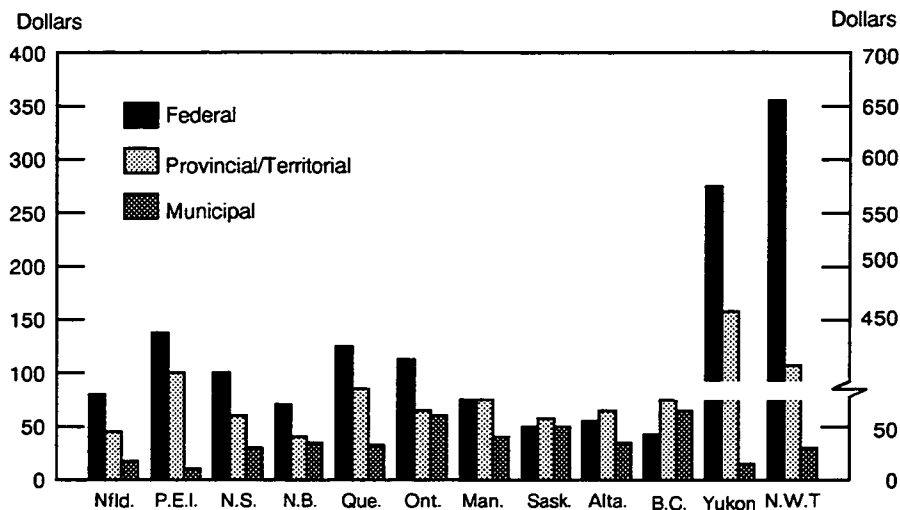
**Table 2**

### Ups and Downs of Government Expenditures on Culture

Province or Territory	Level of Government			Total
	Federal	Provincial or Territorial	Municipal	
percentage change, 1990-91 to 1991-92 <sup>1</sup>				
Newfoundland	-21	5	2	-11
Prince Edward Island	18	15	-	16
Nova Scotia	-11	-12	7	-9
New Brunswick	-5	2	55	7
Québec	-6	6	-23	-5
Ontario	2	3	2	2
Manitoba	-10	-2	-4	-6
Saskatchewan	-16	-11	-9	-12
Alberta	-10	1	2	-3
British Columbia	-6	13	13	8
Yukon	17	53	-	30
Northwest Territories		-10	-62	-4
<b>Total</b>	<b>-4</b>	<b>4</b>	<b>-2</b>	<b>-1</b>

<sup>1</sup> based on constant 1990-91 dollars

**Figure 2**  
**Per capita Government Expenditures on Culture, by Province or Territory, 1991-92**



territories experiencing drops in spending, and others recording growth.

In 1991-92 the greatest drops in spending occurred in Saskatchewan (12%) and Newfoundland (11%), followed by Nova Scotia, Manitoba, Quebec, the Northwest Territories, and Alberta, due largely to a reduction in expenditures on broadcasting and heritage activities. On the other hand, outlays actually increased in the Yukon, Prince Edward Island, British Columbia, New Brunswick and Ontario, with libraries, the performing arts, broadcasting, and heritage activities receiving the most.

At the federal level, the 4% decrease in spending in 1991-92 was felt across the country, with the exception only of Prince Edward Island, Ontario, and the two territories. Broadcasting and heritage activities were hardest hit in those provinces where spending reductions occurred, whereas broadcasting and the performing arts benefitted most where growth was recorded.

Municipal cultural spending, despite the overall drop of 2%, actually increased or stayed steady in most of the country. New Brunswick, in fact, showed an exceptional increase of 55%. However, sizeable declines in the Northwest Territories (62%) and Quebec (23%), supported by decreases in Saskatchewan and Manitoba, brought nationwide expenditures at this level down.

Expenditures on libraries were largely accountable for the changes, in both directions. For example, municipalities in New Brunswick spent \$21.3 million on libraries in 1991-92, compared to \$14.2 million in 1990-91, whereas the Northwest Territories' spending in this area dropped to \$1.7 million from \$4.2 million over the same period.

Expenditures on culture by the provinces and territories were also up everywhere but Nova Scotia, Saskatchewan, the Northwest Territories and Manitoba. In the Yukon and Prince Edward Island, growth in spending far exceeded the national average of 4%, at 53% and 15% respectively. Increases were largely allocated to the performing arts, the literary arts, libraries, broadcasting and cultural centers. On the other hand, reported drops in spending were due mainly to reductions for libraries and heritage activities.

As Table 2 illustrates, only Ontario received increased funding from all three levels of government, and these percentage increases were very small. The Yukon and Prince Edward Island did, however, both improve their situation, with increases at the federal and provincial/territorial levels, and no change at the municipal level. Saskatchewan and Manitoba, on the other hand, experienced reductions at all three levels of funding and Saskatchewan ended with the largest overall percentage decrease (12%). Newfoundland also suffered, with a major reduction at the

federal level, as did Nova Scotia, which took a sizeable drop at both the federal and provincial levels.

#### Per Capita Differences by Province and Territory

As may be expected, federal spending was by far the highest, on a per capita basis, where the population is smallest - in the Northwest Territories (\$655) and the Yukon (\$574), followed by Prince Edward Island (\$137) (see Figure 2). Quebec and Ontario, where much of the infrastructure for the cultural industries is concentrated, came next at \$125 and \$112 respectively. Per capita spending in all other provinces fell below the national average of \$106; it was, however, higher in the East than in the West.

No clear geographic pattern emerged for cultural expenditures by provincial and territorial governments. On a per capita basis, outlays far exceeded the national average of \$71 again in the Yukon (\$451), the Northwest Territories (\$216), and Prince Edward Island (\$99), with Quebec, British Columbia, and Manitoba following. In all other provinces, spending fell below the national average.

Municipal cultural expenditures, on a per capita basis, fell below the national average of \$47 in all provinces and territories except British Columbia (\$64), Ontario (\$59), and Saskatchewan (\$49). In contrast to the federal picture, municipal cultural expenditures, on this basis, were higher in the West than in the East.

#### Spending Priorities by Level of Government

Cultural outlays by governments in Canada target the cultural industries (including broadcasting, film and video production, book and periodical publishing, and sound recording), libraries, heritage and the arts. Nevertheless, the three levels of government continue to spend their cultural budgets quite differently: the federal government concentrates its spending on the cultural industries, provincial and territorial governments on libraries and heritage, and municipal governments on libraries. The arts are not the principal funding recipient at any of the three levels.

Devoting nearly \$3 billion to culture, the federal government allocated two-thirds of this amount

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to the cultural industries, with the broadcasting sector receiving three-quarters of the cultural industries' portion. Federal spending on the cultural industries was again concentrated in Ontario and Quebec, supporting the existing physical concentration of production facilities and related infrastructure.

The way in which federal expenditures were apportioned varied from one province or territory to another. In Quebec, for example, 72% of federal cultural expenditures were allotted to the cultural industries, a higher proportion than in any other province or territory. In Prince Edward Island, on the other

hand, the split was the most even, with 38% to the industries (the lowest proportion of any province or territory), 35% to heritage, and 24% to the arts (the highest proportion of any province or territory).

Libraries and heritage together received \$1.2 billion, or three-fifths of all provincial and territorial cultural spending in 1991-92. The proportion of the provincial and territorial cultural budgets spent on libraries ranged widely, from 63% in British Columbia to 16% in the Northwest Territories. Heritage activities were similarly affected by provincial and territorial priorities: Prince Edward Island and the Yukon each spent 38% of their cultural

budgets on heritage, while Newfoundland devoted 13%.

Spending on libraries figured significantly in municipal cultural expenditures as well, accounting for over \$961 million, or three-quarters of total municipal cultural spending. Libraries in Newfoundland and the Northwest Territories each received nearly the entire amount of municipal cultural funding available, whereas the proportion was the smallest in Quebec (68%). □

<sup>1</sup> All percentage changes in this article are calculated after taking inflation into account.

## Preferences for Cultural Activities Vary by Province

Mary Cromie, Editor, Focus on Culture

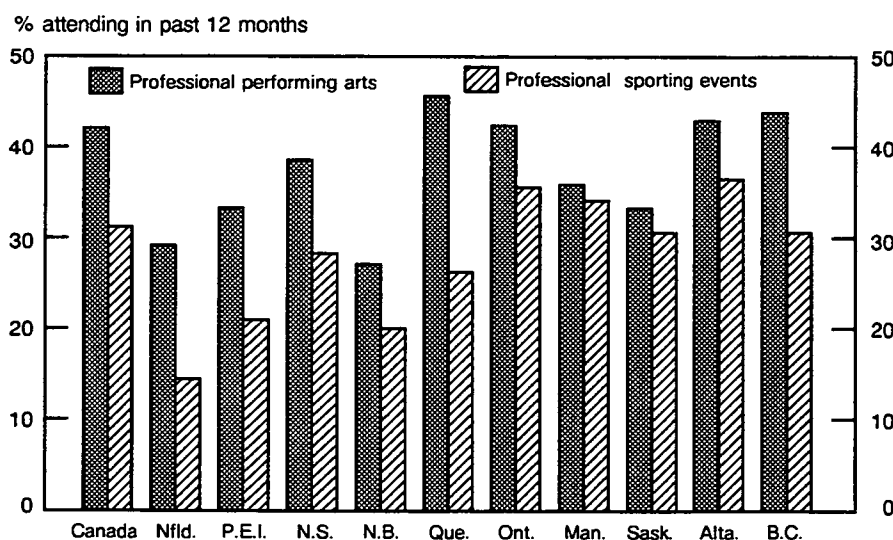
Where they live is certainly a key component in establishing Canadians' cultural habits. The annual General Social Survey contained a series of questions on participation in cultural activities that provide the data on provincial patterns of participation in cultural activities during 1992.

### The Performing Arts

The percentage of the population 15 and over who attended a performing arts performance during the previous year averages 30% for Canada as a whole. However, the provincial variations are significant, ranging from a low of 15% in Newfoundland to a high of 34% in Ontario. British Columbia and Québec are tied

for a close second, at 32% each. It is suggested that at least some of this variation is linked to the availability of the performing arts by province. Although covering only the not-for-profit sector, our annual survey of performing arts companies clearly shows that over three-quarters of the performing companies are indeed located in these three provinces of highest participation.

**Figure 3**  
**Performing arts attract more spectators than sporting events, 1992**



Looking at the performing arts disciplines individually, (theatre, music, dance and opera), residents of Québec are more likely to attend a theatrical or stage performance (particularly any form of comedy) and less likely to take in a dance performance than residents of most other provinces, especially the West. At the same time, in the area of children's performing arts (of all types), Québec was the highest, with 10% of Quebecers attending a performance in the previous year.

How does attendance at professional sporting events compare with that at professional performing arts performances? The survey indicates that 31% of all Canadians went to a sporting event in the previous twelve months, compared to 42% to a performing arts performance. The provincial distribution of attendance at these two types of events is roughly similar for each of the Atlantic provinces, Ontario and British Columbia, while Quebecers are much more likely to support the arts and residents of the three Prairie provinces, sports (see Figure 3).

Continued p. 7

A slightly larger proportion of Nova Scotians than residents of any other province, more consistently attend all types of performances of popular music. However, if we separate out the different kinds of popular music, we see that Quebecers far exceed all other provinces in terms of attendance at performances of both pop/rock (20%) and jazz/blues (13%). At the same time, the eastern provinces support folk music more, and country and western music appeals most to the residents of Saskatchewan, followed closely by P.E.I. Islanders. This latter preference in music is carried through in radio listening habits; Statistics Canada's Radio Listening Data Bank shows that residents of P.E.I. and Saskatchewan vastly exceed those of all other provinces in the percentage of their listening time devoted to country music.

### Museums Favoured by Nova Scotians

The percentage of Canadians 15 and over visiting museums at least once in the previous year averages 32% for Canada as a whole. However, the figures range from 23% for New Brunswick to 45% for British Columbia. What is perhaps most of note is the attendance patterns of Nova Scotians. For practically all types of heritage institutions, such as museums of science and technology, natural history, general or human history and community museums, they either led or placed a close second to all provinces in terms of levels of participation. In fact, a higher proportion of residents of Nova Scotia visited historic sites than did any other Canadians. Only for zoos and aquariums did they fall way behind a number of other provinces, but this is a function of accessibility to facilities as much as anything. By and large, the Atlantic provinces supported festivals and fairs more than residents of the west (57% vs 50%), as well as circus' and ice shows.

### British Columbia a Reading Province

It would appear that British Columbians are the most avid readers of the country. The proportions who read magazines (88%), and books (78%), in the past twelve months, exceed those in other provinces, and as newspaper readers, they exceed the national average, although the residents of Prince Edward Island clearly show the highest percentage (97%). Further, British Columbia reports the largest proportion borrowing

library books, although interestingly, this certainly is not related to the number of public library service points available to residents.

### Going out to the Movies or Staying Home?

Does the pattern of going to the movies versus renting a movie for home viewing on the VCR vary significantly by province? Actually, the percentage differences between the provinces are much less than those between these two types of entertainment. The Canadian averages for participation during the previous 12 months, are 49% for going to the movies and 71% for home rental. Movie going is lowest in New Brunswick and Newfoundland (38%), while a noticeably lower proportion of residents of Québec watch rented movies than persons in any other province (just 62%). If we look at provincial data on the ownership of VCRs, the percentage of households with a VCR is, in fact, slightly lower for Québec than for other provinces (69% versus 74% for Canada).

Many other variables can be looked at using the General Social Survey data base. For example, the Winter 1993 issue of *Focus on Culture* contained an article on the socio-demographic characteristics of live-theatre patrons. If you are interested in more information about the data used in this article or other kinds of data available, please contact Mary Cromie at (613) 951-6864. □

## Publications

New since our last issue	Price in Canada
87-204 Film and Video, 1991-92	\$22.00
87-208 Television Viewing, 1992	\$26.00
<b>Still available</b>	
87-202 Sound Recording, 1991-92	\$22.00
87-203 Periodical Publishing, 1991-92	\$17.00
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
87-210 Book Publishing, 1991-92	\$17.00

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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.

## Cultural Labour Force Project Data Collection in May

The survey of the cultural sector labour force is in its final stages of preparation and will be into the field before summer!

This major survey, which is sponsored by Human Resources Development Canada (HRDC) will be conducted in May 1994 and results will be available the following November. The aggregated data from the survey will provide a great depth of information on artists and cultural workers: their labour market status and patterns, training, financial status, and related demographic characteristics.

Both the sponsor of the survey and representatives of the cultural community, with whom we have had extensive consultations, have noted the great value of this data to their

policy development activities. It will fill a critical gap that has always existed regarding national data on the employment characteristics and career paths of those that contribute directly to Canada's cultural environment.

This great depth of information will be possible as the survey will be targeted at specific groups within the cultural sector who are identified on a "list frame". These are people who have been identified -- again with the close cooperation of the cultural community -- through their affiliations with cultural associations, unions and councils.

Earlier plans for the Cultural Labour Force Project had included a parallel survey to assess also the breadth of the cultural sector

by identifying people in a general population survey reporting any involvement in the cultural sector. Unfortunately, recent budget cut-backs have forced cancellation of the latter survey. Current plans are to compensate by relating the results of the list frame survey to other surveys, such as the Census and the Labour Force Survey, to give the in-depth information a broader perspective. However, some potentially valuable detail will no doubt be lost.

If you would like more information on the Cultural Labour Force Project, please call our toll-free number, 1-800-661-2100. □

## Book Publishing in Canada

*Manon Nadeau, Project Manager, Book Publishing*

In 1991-92 in Canada, the book publishing sector included 322 publishing firms with revenues of more than \$50,000, an increase of 36 firms over 1987-88. There were also 48 exclusive agents in Canada in 1991-92, virtually the same number as in 1987-88. This is a brief examination of how book publishing evolved over the five-year period.

### Record number of titles published

According to the survey of book publishers, a record 8,722 titles were published in 1991-92, a 27% increase over 1987-88. During this period, only 1990-91 was marked by a decrease (1%) in the number of titles published compared to the previous year. The majority of the new releases were tradebooks.

The number of reprinted titles rose by an appreciable 34% during this period, from 4,562 in 1987-88 to 6,065 in 1991-92. However, there was a 6% decrease in reprinted titles in 1991-92 compared to the previous year.

### Slow growth of domestic sales

Sales in Canada of own titles and exclusive agency titles did not grow rapidly. Taking inflation into account, domestic sales of own titles reached \$464 million in 1991-92, which represents real growth of only 2% compared to 1987-88. We note that in 1991-92, there

was a decrease of 6% in sales of own titles in Canada compared to the previous year. If we compare 1987-88 to 1991-92, true sales of own titles outside Canada<sup>1</sup> increased much more rapidly (43%) than domestic sales (2%).

Sales of exclusive agency titles in Canada increased slightly more rapidly than sales of own titles. In 1991-92, sales of exclusive agency titles reached \$530 million in constant dollars, a real increase of 3% compared to 1987-88.

### Profit down

Nearly 38% of publishers reported losses in 1991-92, compared to 27% in 1987-88. In 1991-92, publishers had an average profit<sup>2</sup> of 5% of total revenues, the lowest profit recorded since 1987-88. For the entire period, exclusive agents realized an average profit of 3% of total revenues. Exclusive agents had a lower average profit than publishers during the period observed.

### Increase in financial aid

In 1991-92, publishing firms received \$24 million in financial aid from the public and private sectors, a 15% increase over 1987-88. However, the proportion of firms which obtained grants has remained largely the same since 1987-88. In 1991-92, nearly 64% of

the 322 firms received financial aid, and the average amount of aid was more than \$115,000 or roughly the same as in 1987-88.

### Stagnation of full-time jobs

From 1987-88 to 1991-92, the average annual rate of growth of full-time jobs in the publishing and exclusive agency sector was less than 1%. In 1991-92, publishing firms provided full-time employment for 6,201 people with an average salary of \$35,000. For the same year, exclusive agents provided full-time jobs for 928 people who received \$29 million in pay, for an average salary of \$31,000.

In summary, the increase in the number of publishing firms and titles published did not result in a significant rise in domestic sales. Consequently, profits declined and the number of full-time jobs remained virtually unchanged. □

<sup>1</sup> Does not include exports of other foreign sales of own titles.

<sup>2</sup> Sales of exclusive agency titles are taken into consideration in calculating publishing firms' profit.