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F O C U S O N



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Where Culture Meets the Bottom Line . . .

Change in format produces rapid growth in revenues in the record industry

Annalisa Saloni, Former Project Manager, Sound Recording

A trip to the record store ten years ago was a decidedly different experience than it is today. Where did all the vinyl go? I remember asking myself this question a few years ago. Unsuccessful in finding the tape of a record my parents had, I tried to find the album, only to discover that vinyl albums were no longer available in most retail stores. You may have grown up listening to albums belonging to your parents or even your grandparents, but you won't have to go too far today to find a 12 year old who has never even seen one.

Why did vinyl disappear so fast?

If we look at Figure 1, we can see that a dramatic shift occurred during the eighties in the formats in which recorded music is sold. In the early eighties, sales of vinyl albums were decreasing rapidly. Figure 2 shows that revenues from sales of recordings at that time were stagnant and the volume of recorded music sold was actually dropping slightly, since increases in tape sales were not quite making up for the large decreases in album sales.

Introduction of the CD a goldmine for the record industry

While the volume of recorded music sold has crept up gradually since the early eighties, sales revenues, on the other hand, have almost tripled (Figure 2). The reason the record industry has been able to transform relatively moderate increases in volume of sales into significant annual growth in sales revenues is due to its introduction of the compact disc. This new format was a more desirable product, but it was also much more expensive than existing formats. While the average unit price of the CD has dropped since its introduction in 1983, it has not fallen to that of the tape (Figure 3). The impact of the increasing market penetration of this higher priced format can be seen in Figure 2: despite only moderate increases in total

sales volume, total sales revenue has risen dramatically since the mid-eighties, paralleling the large annual growth in CD sales since 1986.

Penetration of the CD player still low

The impact of the CD on sales revenue is quite remarkable given that the majority of households still do not possess the equipment needed to play CDs. While the percentage of households with a CD player is growing, it was still only 33% in 1993, low in comparison with the percentage possessing cassette players (74%) or VCRs (77%). Despite this low level of equipment ownership, CD sales accounted for 62% of revenue from the sale of recordings in 1992-93.

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Those in high income households more likely to be buying CDs

Average household expenditures on recordings have shown a large increase during the period when CD sales have increased rapidly. A closer examination of the data for household expenditures shows that it is high income households which are more likely to be buying CDs. Statistics show that the likelihood that there is a CD player in the household rises with household income. Higher income households also show much greater proportional increases since 1986 in average expenditures on recordings, suggesting that more of the music purchased in these households than in lower income households is in the CD format.

Continues to be room for two formats in the market

The disappearance of vinyl albums from store shelves was virtually complete by 1990. Although sales of vinyl had been dropping rapidly before the introduction of the CD, it is likely that the new format ensured the swift disappearance of vinyl albums as the record companies slowed production and promoted sales of the more profitable CD.¹

In contrast, however, the rapidly increasing sales of CDs have not been accompanied by a comparable decrease in the number of tapes sold (Figure 2). And there will probably continue to be a healthy market for tapes as long as the price of CDs remains substantially higher. The majority of households have a cassette player and that proportion remains stable, even with the increasing penetration of CD players. Tape players are generally more affordable than CD players, and many households possess more than one player either as a "walkman", car stereo or other portable cassette player, in addition to possessing a unit in a home sound system.

New digital formats not likely to be as successful in generating revenue as the CD

The positive effects on their revenues of the introduction of a new higher priced format have not gone unnoticed by record companies. Only ten years after the introduction of the CD, two additional new formats have been introduced onto the market – the MiniDisc and the digital compact cassette (DCC). However, it is unlikely

Figure 1

Sales of CDs soar in recent years, surpassing tapes

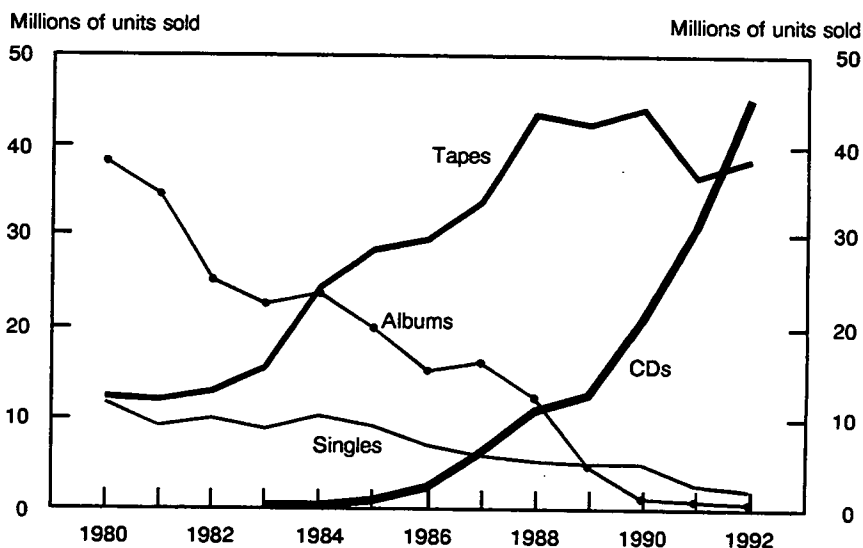
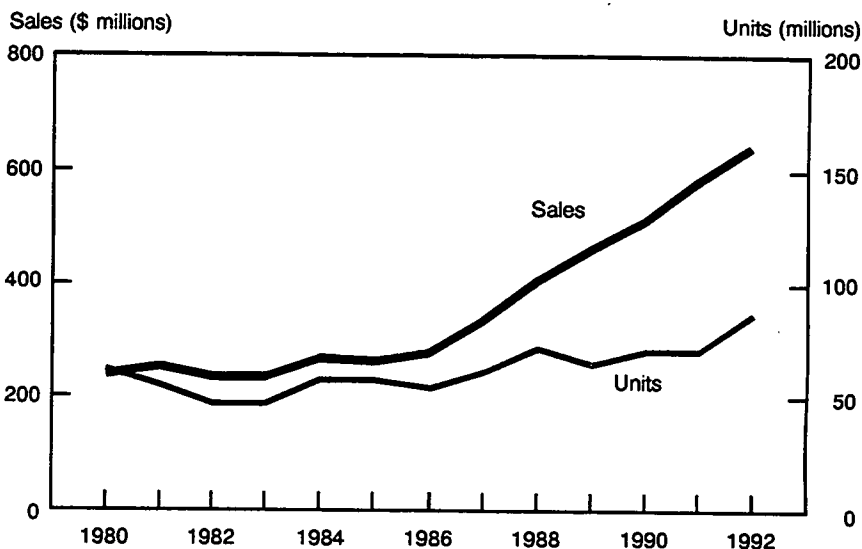


Figure 2

Revenues climb with increasing market penetration of the higher-priced CD



that these new formats will be able to produce increases in revenue similar to those witnessed following the introduction of the CD.

At a time when two-thirds of households have not yet invested in a CD player, there are early signs that considerable resistance exists to the introduction of other new formats so soon after the

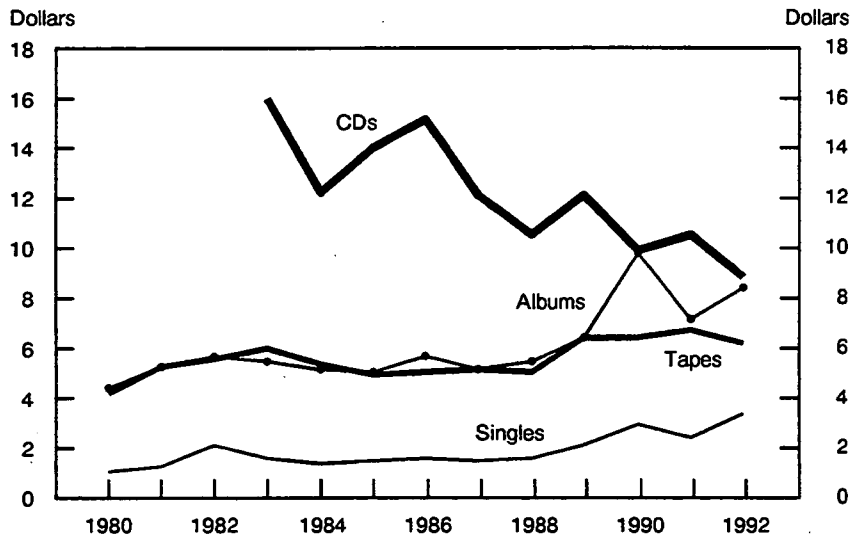
introduction of the CD. Sales of the DCC and the Minidisc are negligible in Canada, and the largest record retail chain in Canada has already sent its inventory of DCCs back to the distributor, refusing to continue to stock the format on the basis of its very low sales performance.²

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There were distinct advantages to buying into the new CD format when it was introduced – CDs provided an otherwise unavailable digital sound quality in a more durable format than had ever before been available. When it was introduced, sales of the previously dominant format, the vinyl album, were already in rapid decline. In contrast, the newer formats, which do not provide higher quality sound than already available on CD, are being introduced at a time when there is little real dissatisfaction with existing formats – sales of CDs are still increasing rapidly and cassette sales have not dropped substantially.

Underlying all of this development of new formats in hopes of creating new revenues, is the interesting fact that the amount of recorded music being sold appears to be a moderately stable quantity, despite significant changes in demographics such as the ageing of the baby boom generation, and the introduction of new broadcast media such as MuchMusic. Given the requirements of the bottom line in the record industry, and the successful generation of revenue with the introduction of a new format, attempts by record companies to render your music library obsolescent with the introduction of new media are likely to continue.

Figure 3
Average price* per unit by format



* Net sales at first point of delivery divided by number of units sold.

- 1 "King Compact Turns 10", *The Ottawa Citizen*, Oct. 30, 1993
- 2 John Heinzl, *Globe and Mail*

Data used in this article are from Statistics Canada's annual Survey of Sound Recording, Survey of Family Expenditures, and Household Facilities and Equipment Survey. □

Four Culture Sector Studies

Paul Thompson, Human Resources Development Canada

The Canadian cultural sector is currently facing challenges on a number of fronts. Poor economic conditions have had an impact not only on consumer spending but have also affected the levels of public funding (see "Federal Cultural Spending Hit Hardest", p. 7) and corporate support. In addition, increasing competition within the sector among all forms of leisure and entertainment, is combined with competition from the import of foreign, principally American, cultural products. On top of this, the technological landscape is changing dramatically, creating new forms of cultural expression and new distribution networks and at the same time raising many questions on issues such as access, regulation, and copyright. Such changes inevitably have an impact on the sector's labour force, in terms of both the opportunities for employment and the skills requirements.

Selected Indicators

Are families spending a higher proportion of household income on cultural goods and services than they did 20 years ago? or ten years ago? or in 1990? And how much is that, on average, per person? Just how many hours of TV do we watch per week? How common is it for Canadians to own CD players, or subscribe to cable TV or own VCRs? How much does each level of government expend on Canadian cultural activities and industries? Is this increasing or decreasing or a bit of both? How does full-time employment compare with part-time in the film-production industry, for example? Have these employment ratios been changing in the various cultural industries, in

response to recent overall adjustments in the Canadian labour force? And what is the total direct and indirect economic impact of the arts and culture sector in Canada?

If you are pondering over questions such as these, then you can come to us for the answers. The newly-released 1992-93 edition of *Selected Economic, Financial, and Cultural Indicators for the Cultural Industries Sector* (\$100) contains a summary of the most recent statistics on Canada's cultural industries and institutions and Canadians' involvement and participation in them. To find the answers to your questions today, contact Margaret Buchinski at (613)9516862 or Michel Durand at (613) 951-1566 to order your copy of *Selected Indicators*.

With this in mind, representatives from major organizations and government departments in the cultural sector have been working with Human Resources Development Canada (HRDC) for the past two years, in a process to develop

a human resource strategy for the sector. The two major components of this initiative are a study of human resource issues in the sector, and a

Continued p. 4

survey of the cultural sector labour force. The latter project, being conducted by Statistics Canada on behalf of HRDC, will provide for the first time, a comprehensive database of labour market information for the cultural sector. This survey has been highlighted in several previous issues of *Focus on Culture* (for example, Spring 1994, Vol. 6, No. 1).

The human resource study began in September 1992 with a number of background research projects: an economic profile of the cultural sector, a labour force profile, bibliographies of relevant English and French literature, an inventory of education training, and a review of socio-economic and technological trends.

The findings fed into the second and more substantive part of this component of the project where, for analytical purposes, the bulk of the sector was divided into four sub-sectors: Music and Sound Recording, Audio-Visual (including film, TV and radio) and Live Performing Arts, Literary Arts and Publishing, and Visual Arts and Crafts.¹ Working groups of representatives from each sub-sector directed the research which included personal interviews, focus groups, and case studies as well as an analysis of secondary data and a review of relevant literature. While final reports will be released in November of this year,

preliminary findings were presented at the June conference of the Canadian Conference of the Arts.

Included in each sub-sector study is assessment of the environment, including changes in markets, technology, and public policy. Also examined are the composition and characteristics of the labour force and the current infrastructure for education and training. After examining this material and developing a consensus on the issues, current and anticipated gaps in training and professional development are identified.

The working groups have adopted a life-cycle approach to human resource issues, examining the various stages of careers for creators, interpreters, administrators and technicians in the sector. Elementary and secondary education has been identified as a priority area both in terms of creating a strong foundation for a career in the sector and as a means for long-term audience and market development. The appropriateness of post-secondary programs in universities and colleges has also emerged as an important issue and the extent to which they adequately prepare individuals for a career in the sector. Transition from school to work presents difficulties for many and has been highlighted as an area to be addressed. A range of professional development needs for the existing

workforce has also been identified including mentorship programs and career management training for creative and interpretive occupations.

Sector representatives are currently developing an action plan to address the findings and will be submitting a proposal to HRDC to create a sectoral human resource council. This council will use the findings from the four studies² along with the results of the Statistics Canada survey (to be available at the end of November), to develop the overall human resources strategy for the sector. A communications plan is also being developed to disseminate all findings and validate the proposed action plan with the cultural sector.

¹ A fifth sub-sector, the heritage area, is examining human resource issues on a separate but parallel track. The museums community has been active in this area for a number of years. Their work, along with the results of more recent activity in the libraries, archives, and records management areas, will feed into the development of the cultural sector human resource strategy.

² The final reports in each of the four sub-sectors plus an overall summary report will be available in November from the Sector Studies Directorate, HRDC, 112 Kent St., 21st Floor, Ottawa, Ontario, K1A 0J9 or by fax at (613) 957-2698. □

Cultural Goods and Services: Weathering the Current Economic Climate

Michel Durand, Chief, Cultural Industries

During the past decade, the growth of the cultural sector has outpaced the growth rate of the rest of the economy, reflecting a growing demand for cultural goods and services. This trend has also been evident in many other developed countries.

When examining the health of the cultural sector, we can look at such elements as the supply of goods and services, the growth and composition of the cultural labour force and changes in

Editor's Clarification: Broadcast Media

This is a clarification of the article "TV and Radio, Books and Magazines - Supporting the Economy", in the Summer issue of *Focus on Culture* (Vol.6, No.2). This article dealt with the print and broadcast media overall, without clearly defining which industries were included in the sector. We normally use the term "broadcasting sector" to cover radio and television, including cable. Unfortunately, the substitution of the term "broadcast media" in this article has caused some confusion with our readers as it was not made clear at the

beginning of the article that subsequent discussion included cable and speciality services. We regret any misinterpretations of the financial performance of Canadian radio and television broadcasters this may have caused.

The article looks at print and broadcasting at an aggregated level and considers their contribution to the gross domestic product and employment in Canada. It was not intended to discuss, in detail, the financial performance of the various component industries, but if more details are required, please contact Fidelis Ifedi at (613) 951-1569.

the demand for cultural products, as well as how the interplay of these factors can influence the vitality of Canadian cultural content.

A number of factors have all contributed to the increasing supply of cultural goods and services.

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Supply of Cultural Goods and Services

A vibrant and growing Canadian cultural infrastructure has developed that can now sustain an increasing number of cultural products and services. Various government policies and fiscal programs have actively supported the production and distribution of cultural goods. Further support has come from a healthy level of corporate investment. In addition, there has been the stimulation of increased demand, fostered by such socio-economic factors as higher average levels of education, a larger proportion of two income households and a gradual aging of the population. And lastly, increased levels of foreign exports have brought in revenues that can be channelled into subsequent additional production.

Within the past few years however, a number of factors have also been working in the opposite direction, to dampen this growth in the arts and culture sector. Personal disposable income has been growing only moderately, as a larger share of our incomes is going to direct and indirect taxes and wage levels are being frequently frozen or rolled back. Consumer confidence overall has been low. The demand for cultural goods is becoming increasingly fragmented, as more cultural and recreational options are available to us. At the same time, we are making our choices more carefully among these options, as the amount of disposable leisure time appears to be shrinking. The cost of many cultural goods and services has increased significantly, again making consumers choose more carefully, and perhaps select alternate options altogether. In fact, the option of staying at home is becoming increasingly popular.

The strength or weakness of the arts and culture sector is primarily tied to the demand for arts, culture and recreational commodities. For most, if not all cultural industries, some reductions in real economic growth occurred in the early 1990s as Canada's economy in general suffered a severe slowdown.

Cultural Labour Force

Private and public sector investment and consumer demand have had a very positive influence on growth of the cultural labour force. The last two

decades have witnessed increased development of the arts in communities throughout many regions of the country. There has been considerable growth in the diversity and the number of arts organizations, providing expanded employment opportunities, even in periods of overall high unemployment.

Census data show us that between 1971 and 1986, the arts and culture labour force grew at a much faster rate than the total labour force or the population. Arts and culture occupations expanded by almost 100% during this period, whereas the total labour force increased by less than 50%. This growth was projected to continue, fuelled by rising levels of education, changes in the composition of the labour force, the ageing of the population, and changes in the nature of consumption. Results from the 1991 census indeed confirm that the cultural labour force grew another 13.1% between 1986 and 1990, to reach almost 350,000 (or 2.5% of the total labour force). During that time the total labour force grew only 7.9%. So once again culture occupations grew almost twice as fast as the total labour force, reflecting the dynamic nature of this sector. Moreover, certain characteristics of the census prevent the capturing of a full picture of labour activity in this sector, as only information on the respondent's primary economic activity is captured. Given the tendency towards multiple job holding, it is suggested that some significant amount of employment in the cultural area goes unrecorded. In addition, if one looks at the growth in more detail, it appears that at least some of it is attributable to an increase in part-time jobs. As the arts and culture sector faces continued restructuring brought about by dramatic technological changes and increasing competitiveness, the growth rate of this segment of the labour force can be expected to moderate.

Demand for Cultural Goods and Services

The cultural sector is indeed dynamic, in relation to the economy as a whole. During the expansion years of the 1980's, consumer spending on recreation and culture recorded an annual average growth rate of 5.0% between 1981 and 1989, while total consumer expenditures showed an average annual rate of increase of 3.4% (in constant 1986\$). However, data suggest that recessionary times take

a greater toll on consumer spending for culture and recreation as consumers divert their shrinking discretionary incomes to purchase the basic necessities.

The value of all recreation and culture goods and services purchased in 1992 (from theatre tickets to books to compact disc players to tickets to ball games to works of art to flute lessons to fishing rods) exceeded \$34 billion at the national level (Survey of Family Expenditures).

Between 1982 and 1992 there were pronounced shifts in expenditure patterns of Canadian families. The proportion of total household expenditures which was used on food declined steadily, from 20.4% to 17.5% of the total, while shelter expenses, including household furnishings and equipment, as a proportion of the total, increased from 22.0% to 33.0%. Transportation expenditures increased one percentage point to 17.1%, while spending on clothing and footwear dropped from 8.1% to 6.7%. Spending on recreation and culture increased regularly during this period, although marginally, from 7.35% in 1982 to 8.26% in 1992.

Between 1982 and 1992, average annual family expenditures on cultural goods and services showed large increases in some categories (e.g., technology), while displaying only marginal increases or drops in others. Some of these of interest are:

- Home entertainment equipment related expenditures (excluding cable) displayed large increases in family expenditures between 1982 and 1990, from \$189 to \$323, but then dropped to \$289 in 1992.
- Expenditures for video tapes and discs jumped from \$6 per family to \$101, representing a 40% annual increase.
- Expenditures for cable more than tripled, from \$56 to \$186, a 15% annual increase.
- Spending on going to the movies showed no growth between 1982 and 1986, at \$41 per family for both years, but increased sharply to \$72 by 1990, to then drop once more to \$48 in 1992.

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- Expenditures for attendance at live stage performances increased 89% to \$51.
- Expenditures for records, tapes and CDs almost doubled, going from \$54 to \$101.
- Family expenditures on admissions to museums increased between 1982 and 1986 (from \$15 to \$24), but remained rather unchanged between then and 1992, fluctuating between \$22 and \$26.
- All print media categories (books, newspapers and periodicals), showed rather large increases between 1982 and 1990, but have suffered losses in the last few years.

A Reduction in Frequency of Participation

On the assumption that consumer demand for cultural commodities is price elastic, we may expect the demand to nosedive if prices continue to rise substantially or disposable income shrinks even more. Consumers are allocating a greater share of their personal expenditures to recreational/cultural activities than they had ten years ago. However, in many cases this may be attributed to inflated prices rather than an increased quantity of goods and services purchased. For the period extending from 1982 to 1992, the average annual increases in the consumer price index (CPI), for live stage performances, reading material and movies surpassed the average annual increase in the inflation rate for all items, by 58%, 53% and 22%, respectively.

Canadian Content Market Share

Have Canadian content products benefitted from the overall increased demand of the past decade for cultural products and services generally?

Major, long-standing policy issues have affected the health, vitality and competitiveness of Canadian-controlled and Canadian content goods and services in the arts and culture sector.

Canadian companies finance the overwhelming majority of the "less profitable" Canadian cultural products. Most cultural products imported into Canada, however, are distributed not by Canadian companies, but by subsidiaries of foreign production or distribution companies.

The anticipated effect of further increases in foreign-control and market share of imported products, and the possible reduction in consumer demand overall, will be to slow down the growth of expenditures on Canadian programs, products and services. But what actually has happened in the last few years? Let's touch on our survey data on the film, recording, book publishing and television industries.

- Sales and rentals of Canadian films have doubled over the last five years, although they still represent only a small share of total distributors' revenue. In 1988, Canadian products earned about 9.0% of distribution revenue while in 1992 they accounted for 18.4 % or \$119.6 million), which was one of the best performances to date.

This percentage varies for each market; 23.0% of the home entertainment sector is Canadian (including TV, pay TV and home video), and 5.2% of the theatrical sector. The Canadian home entertainment sector has gained ground since 1988 while at the same time the theatrical sector experienced its first decrease in five years.

- In the recording industry, Canadian content accounted for almost 12% of sales, with little change over time.
- Canadian authored books represent 38.7 % of own and agency sales, a near 5 percentage point improvement over 1988.
- Turning to broadcasting, in the English-language conventional television market, where competition is perhaps the strongest, the supply¹ of Canadian dramatic programming has increased by one-third. The percentage of viewing hours to these programmes has also increased by almost the same amount in this market. In the French-language market, the supply of Canadian dramatic programming has decreased by 30% over the past five years, but viewing has still shown a slight increase.

¹ The supply of television programmes has been calculated by weighting individual stations' schedules by the reach of the station. □

Did you know... ?

According to data from the 1992-93 Survey of Periodical Publishing, advertising revenues for periodicals continued to slide, although less dramatically than in the previous year. They stood at \$529 million in 1992-93 a \$7 million drop from 1991-92. Over the last five years, general consumer magazines have been particularly affected by a reduction in advertising revenues of 18% and the number of periodicals in this category has plummeted from 283 to 162.

For additional data highlights from the 1992-93 survey, detailed data tables, and an overview of the industry today, refer to our publication *Periodical Publishing 1992-93*, catalogue 87-203 or contact the project manager, Valerie Howe at 613-951-1562.

Our readers may be interested in knowing that in response to concerns that periodicals published in Canada, with original content, were losing crucial advertising revenues, a federal task force on the Canadian Magazine Industry was set up, and in March of this year reported to the Minister of Canadian Heritage.

Federal Cultural Spending Hit Hardest

Norman Verma, Project Manager, Government Expenditures on Culture

Newly released data from the surveys of government expenditures on culture show that federal cultural expenditures totalled \$2.88 billion in 1992-93, a slight drop from the previous year. On the other hand, provincial and territorial spending went up about 2%, to \$1.97 billion in 1992-93 and municipal governments spent \$1.36 billion, 8% above the 1991 level.

Federal spending drops slightly

The drop in federal expenditures continued the downward direction of the preceding year, when a slight decrease in spending was recorded after having risen for five consecutive years. Over the last two years, not only has the amount of federal cultural spending declined, but also the federal share of all government expenditures on culture has fallen by about three percentage points to 46%.

The change in federal spending on culture was uneven across the country, with some provinces and territories experiencing drops in spending, while others reported growth. Declines in spending ranged from a high of 5% in Prince Edward Island to well under 1% in Quebec and the Yukon. On the other hand, spending increased in seven provinces and territories, led by New Brunswick (18%) and Newfoundland (12%).

The performing arts and heritage activities were hardest hit in those provinces and territories where federal spending reductions occurred, whereas broadcasting and heritage activities benefitted most where growth was recorded.

On a per capita basis, federal spending ranged from a high in the Northwest Territories (\$570) and the Yukon (\$511), to a low in British Columbia (\$41). Per capita spending in most provinces fell below the national average of \$101.

Provincial and territorial spending continues to increase

The growth in provincial and territorial spending on culture in 1992-93 followed the trend of the previous seven years, when spending grew at an average annual rate of about 6%. In 1992-93, the largest increase in spending was reported by Quebec (8%), while the smallest increase, of just 1%, was reported by each of Newfoundland, Nova Scotia and the Northwest Territories. Heritage activities and multiculturalism benefitted most from the spending increase by the government of Quebec. On the other hand, declines in spending ranged from a low of 1% in Ontario to a high of 42% in the Yukon, due largely to a reduction in capital funding for cultural facilities.

The survey results show that the provinces with the largest expenditures did not necessarily have the highest per person expenditures. The governments of Québec and Ontario spent the largest amounts of money but had only the fourth and ninth highest expenditures per person respectively, while the Yukon, with the least spending, ranked first in per person spending.

Growth in municipal spending

Municipal cultural expenditures rose 8% between 1991 and 1992. Over the last eight years, although the federal share of all government spending on culture has declined significantly, and the provincial and territorial share has increased only slightly, the municipal share has grown by six percentage points to 22% of overall government expenditures on culture. Municipal cultural spending grew in 7 of the provinces and territories, while declining in the remainder. Municipal funding for the performing arts jumped again, by 88%, to \$65.9 million in 1992, after having risen by 108% in the preceding year, due largely to an increase in spending on the construction of performing arts facilities.

For more detailed information, see our publication *Government Expenditures on Culture, 1992-93*, (Catalogue No. 87-206), or call Norman Verma at (613) 951-6863. □

Assistant Director getting "acculturated"

The Culture Statistics Program is delighted to welcome Assistant Director, Barry Haydon, on exchange from the Australian Bureau of Statistics for 18 months.

As well as the fresh ideas and enquiring intellect that Barry brings to us from his jobs as Director of the National Culture and Leisure Statistics Unit and Director of Information Services in the Adelaide office of ABS, Barry also comes to the program with extensive experience in the National Accounts and Balance of Payments areas. We look forward very much to the exchange of ideas and perspectives that such an assignment always engenders. If you would like to call and introduce yourself to Barry, his number is (613) 951-9038.

Publications

New	Price in Canada	Still available	Price in Canada
87-202 Sound Recording, 1992-93	\$24.00	87-207 Heritage Institutions, 1991-92	\$30.00
87-206 Government Expenditures on Culture, 1992-93	\$20.00	87-208 Television Viewing, 1992	\$26.00
Still available		87-209 Performing Arts, 1991-92	\$30.00
87-203 Periodical Publishing, 1991-92	\$17.00	87-210 Book Publishing, 1991-92	\$17.00
87-204 Film and Video, 1991-92	\$22.00		

To order publications, please call toll-free 1-800-267-6677.

The Museum Public in Ontario and Quebec

Roxane Bernier, Ph.D. candidate, Department of Sociology, University of Montreal

"Museums, in and of themselves, are artifacts; social documents that reflect, present and transmit the beliefs and value systems of the societies that create them."¹ This study of attendance at museums and art galleries is based on data from Statistics Canada's 1992 General Social Survey concerning the use of time by Canadians aged 15 and over. There were 1,912 respondents from Quebec and 2,239 from Ontario. Only individuals who had visited a museum or art gallery in the previous 12 months are included in this analysis. The object of the study is to identify the socioeconomic variables that influence visits by Quebecers and Ontarians to traditional art museums and science and technology museums.

Participation Levels of Quebec and Ontario Residents

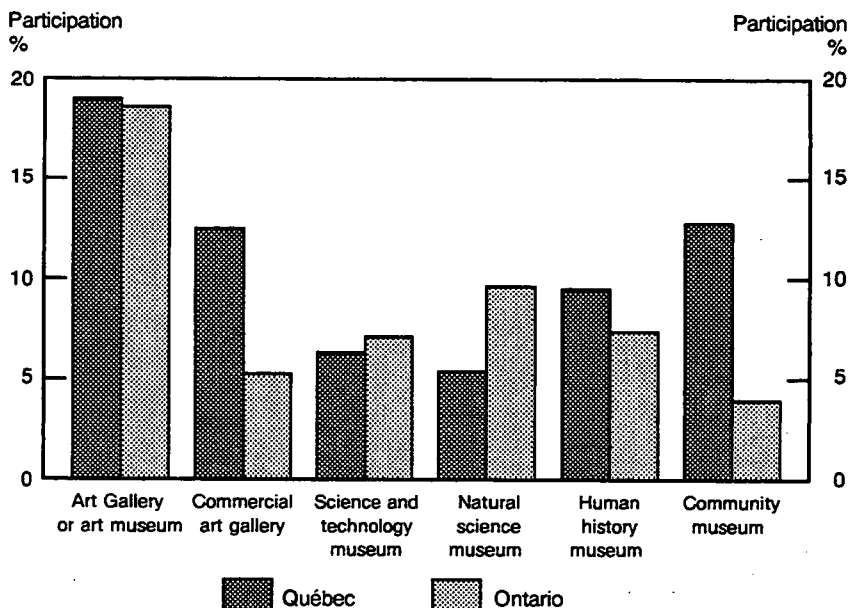
The data show that Quebecers attend museums and art galleries more than Ontarians do, although at 10.9% of Quebec respondents and 8.6% of those from Ontario, participation rates remain very low overall. Residents of Quebec had higher rates of attendance than their Ontarian counterparts at museums of human history, local-interest museums and commercial art galleries, but Ontarians visited natural science museums more frequently (see Figure 1). The proportion of respondents who visited a traditional art museum was similar for both provinces; 18.9% for Quebec and 18.5% for Ontario, whereas science and technology museums drew a higher percentage of respondents from Ontario (7.1%) than from Quebec (6.3%).

Socioeconomic Profile of Quebec and Ontario Visitors to Traditional Art Museums and Science and Technology Museums

Little statistical difference was found between the profiles of Ontario and Quebec visitors to art museums and museums of science and technology. Gender was not a significant indicator of attendance in Ontario, where men and women showed equal levels of interest in traditional art museums. In Quebec, women were more likely to frequent traditional art museums, while in both provinces, more men than women attended science and technology museums.

Figure 1

Ontario and Quebec visitors to museums and art galleries, 1992



Age

Among Quebec residents, those under age 20 had the highest rate of attendance at science and technology museums (8.2%), followed by the 25-34 age group (7.6%). In Ontario, visitors to this sort of museum are generally older, between 35 and 44 (10.6%), followed by the under-20 age group (9.8%). Ontario residents aged 35-44 are also most likely to visit a traditional art museum (21.6%), whereas in Quebec, visitors to such museums tended to be even older: 25.7% of those aged 45-59, followed by 22.7% of the 35-44 age group (see Figure 2). In both provinces, persons over the age of 60 had the lowest rates of attendance at either sort of museum, averaging 8.3% overall.

Family income

The popular image of traditional art museums as the preserve of the elite, and science and technology museums as visited by others, is not corroborated by the survey data. In Quebec, art-museum attendance was indeed highest among households earning \$80,000 and over (42.1%), while in Ontario,

households in the top two income levels (\$80,000 and over, and \$60,000 to \$79,999) were the most frequent visitors to traditional art museums (29.1% and 25.5% respectively).

However, both Quebecers and Ontarians with family incomes of \$80,000 and over were also the most likely (15.9% and 11.8% respectively) to visit science and technology museums. In Ontario, few respondents (4.8%) with incomes between \$10,000 and \$39,999 had visited this sort of museum. In Quebec, the two income groups with the lowest attendance levels at science and technology museums were those under \$10,000 (2.5%) and those earning between \$20,000 and \$29,999 (3.1%).

Education

Quebec and Ontario visitors shared a similar profile with regard to level of schooling. In both provinces, respondents with masters or doctoral degrees were the most assiduous visitors to traditional art museums (55.9% and 43.9% respectively).

Continued p. 9

They were followed in both cases by persons with specialized university-level degrees (e.g. doctors, dentists and veterinarians). Science and technology museums likewise have a visiting public with a higher educational level than the population in general: in Ontario the highest rate of attendance was registered among respondents with masters degrees or doctorates (18.1%), while in Quebec, university-trained specialists visited this sort of museum most (29.4%). Respondents with elementary or secondary education had the lowest level of attendance, followed by those with technical college diplomas.

Language

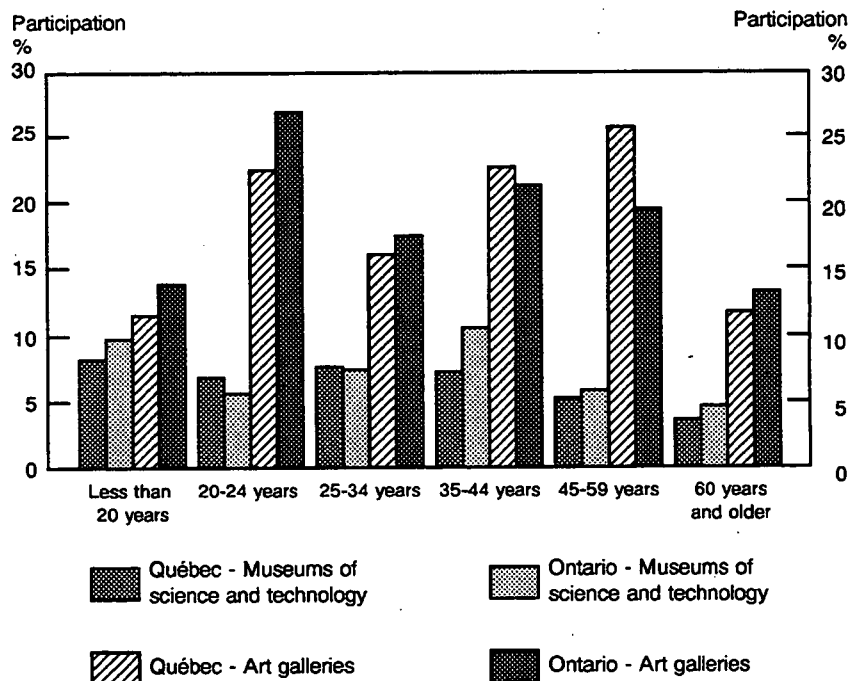
Anglophones in Quebec and Francophones in Ontario attended both types of museums twice as often as respondents from their province's majority linguistic group. Thus, among Ontario residents, 29.1% of Franco-ontarians versus 13% of English-speakers visited museums or galleries, and in Quebec, 23.9% of Anglophones versus 11.8% of Francophones did so. However, the parallel between the provinces does not extend to allophones, for in Quebec, the latter have a higher rate of art museum attendance (21.3%) than Francophones (17.5%), whereas in Ontario, the average for allophones was only 12.4%, compared with 19.1% for English-speaking respondents. Allophone respondents in both provinces reported low levels of attendance at science and technology museums: 3.4% in Quebec and 5.2% in Ontario.

Summary of Results

The data suggest that traditional art museums and science and technology museums interest a small proportion of

Figure 2

Quebec and Ontario visitors to museums of science and technology and to art galleries, by age, 1992



the Quebec and Ontario populations. The typical museum visitor in both provinces and for both types of museum is highly educated (with a university degree), has a very high income (\$60,000 and up) and tends to fall in the 35-59 age range.

The Museum Public of the Future

It is suggested that the importance of science and technology museums is likely to grow, as all walks of society will seek more and more information on today's rapidly changing technological environment. There is reason to hope that such museums will succeed in

attracting a public that has so far not shown strong interest in them, for museums are less and less confined to the role of guardians of collections and increasingly concerned with educating and conveying pleasure. The new type of visitor will see the museum as a source of entertainment and relevant information, not a depository of holy relics.

¹ Robert Sullivan, cited in George F. MacDonald and Stephen Alsford, *A Museum for the Global Village*; the Canadian Museum of Civilization (Hull: *The Museum*, 1989), p. 3 □

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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.

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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