



# FOCUS ON CULTURE

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CANADA Vol. 2, No. 4

## Looking to the Future . . . An article of first impressions

Barry Haydon, currently Assistant Director of the Culture Statistics Program.

It seems somewhat odd for a person from Australia to be writing about Canadian Culture, but in my present role I find myself giving a lot of thought to it and the associated statistical issues. There were a number of options I considered as possible titles for this article and not really wishing to settle for just one of them I want to pass on some of the others. "Culture Statistics at the Crossroads", "Is Canadian Content important", "Culture - who controls it?", "Culture - who needs it?", "Statistics - who needs them?" were all ideas that fluttered through at various stages. Each would give a slightly different (and important) perspective to the topic, but to me, all come back to planning for the future. The old adage *how do we know where we are going, if we don't know where we are, or for that matter where we have been* keeps springing to mind as an explanation of why it is important to have a solid statistical data base (one that provides accurate, timely, cost effective time series data) as the fundamental basis for decision making.

### Where we are

Canada has a very impressive array of cultural statistics. Information is available on a variety of topics both from surveys conducted as part of the Culture Statistics Program and as part of the wider role of Statistics Canada. Data are collected in relation to the cultural and economic situation of individuals, industries and institutions involved in the cultural sector, from the point of view of creators, producers, distributors, suppliers and users of cultural products. *Focus on Culture* is a key vehicle for informing people of the range of data available and the kind of statistical analysis possible, but by definition, can only present examples of what can be done.

It is a fact of life that there are costs associated with the collection and dissemination of relevant data. A part of these costs is associated with ensuring that our data are in fact relevant. Thus it is necessary to constantly ask ourselves whether or not our information is being used

effectively, or for that matter whether or not the data are reflecting today's reality. Recent discussions with many users have indicated that **yes**, our data are important and **yes**, they are being used, **but** more is required. The questions have now become "what more can we do?", "what are the new and emerging statistical priorities?", and "what are the associated costs?"

Another fact of life that is becoming more and more obvious in the current environment is that we are at best dealing with a fixed bucket of resources. The more likely scenario however is that the bucket is leaking and we therefore continually need to be looking for ways of doing more with less.

### Where we are going to go

These factors have led me to conclude that our current statistical collection and dissemination program needs to change. We will be looking to devote more of our effort

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to addressing issues such as the economic impact of culture, statistical issues associated with the information highway, improving our data dissemination service, producing a publication that presents a comprehensive overview of Canada's culture and expanding the scope and coverage of our existing collection activity (depending on data needs and resource availability).

## And how we are going to get there

### information highway

Already a start has been made on understanding the issues in relation to the Information Highway (readers are referred to an article in the previous issue of *Focus on Culture* (Vol. 6 No. 4, p. 3), entitled "Statistics Canada on the Highway"). However, more understanding of data needs is necessary. While there are a multitude of issues that are starting to be addressed by the community of policy makers, academics and practitioners and for which reliable statistics are needed, the fundamentals of our society are in a state of change and this in turn leads to a statistical dilemma. We presumably want to measure the change, but this particular change is a difficult concept – it's a bit like asking, "do we want to count the chickens or the eggs?" – with the answer probably being "both, but what is actually going to be hatched?" Needless to say, we would welcome any comments from readers as to their perceptions of what needs to be done. Certainly our current thinking is based on the assumption that influencing the development of systems such that required data will be readily available from the system itself, is preferable to capturing the same data via an independent survey.

### economic impact

Similarly, some very valuable work on the economic impact of culture has already been done. However, more can (and will) be done in this area. While the ultimate objective is to improve these estimates, as a first step we are planning at least to document the various concepts, sources and methods already being used.

### dissemination

Strengthening our data dissemination program involves a number of steps, but they all centre on being able to respond quickly to client needs and ensuring that users and potential users of our data know what we have

available. One of the steps is to consolidate all of our current annual publications into one. While we are still in the planning stages of our new publication, it will meet a wide range of interests and should be available before the end of the summer. Not only will the content of this new publication cover data from all of our existing surveys, it will also draw together data from a number of other sources (for example, time use and family expenditure information), thereby covering a wider, more encompassing definition of culture than we have been used to. Another step is to guarantee that those users with specific requirements that are currently being served by our existing publications do not suffer – and they will not. In fact, such people are urged to contact Ms Pina La Novara at (613) 951-1573 to ensure that their data needs continue to be met (and no, not at exorbitant prices). A third and important element is proving our worth. It is my contention that it would be cost effective for many of our users to ask us to undertake particular research tasks on their behalf – be it a simple extraction of existing data, a detailed data collection or a thorough statistical analysis. We would like the opportunity to prove this contention!

All of these data dissemination steps will also involve a changed communication strategy, whereby we intend to be more proactive in dealing with the press and key associations with the flow on benefit expected to be more data being made available on a more timely basis to a wider section of the community. This strategy will also encourage people involved in research in the sector to discuss their plans with us, partly so that we can provide advice (where required) but mainly to act as a knowledge centre where we may be able to put people with similar interests in touch with one another.

### Our new reality

"How can this all be done?" is certainly a question that needs an answer. "More resources" would be good, but in most cases this is not the expectation, although working together and forming partnerships is certainly one way of maximizing the impact of those resources that do exist. Rather, the cost of undertaking these new initiatives has been a reorganization within our work area that will in turn lead to reduced frequency and/or detail in our existing surveys. Our current plans are to maintain our detailed data gathering

activity, but on a biennial basis for most surveys. It is expected that our survey of Government Expenditures on Culture will continue on an annual basis. We are not planning to conduct either the Heritage or Sound Recording surveys this year (1994-95 reference year). □

## Musical Copyright: Who Calls the Tune?

*Judith Alexander, Member, Copyright Board*

When you listen to a street band on Main Street or hear your favourite song in the background music at a restaurant do you ever wonder if the composer or the lyricist has been paid for his efforts or how the price was determined? Or, if they have been paid, how they ever found out that their creations were being used? When a song is performed in public, either live or from a recording, the restaurant, the concert hall or the performer must have a licence from the owner of the copyright in the work.

Setting these rates and seeing that users pay reasonable fees while copyright owners receive their fair share is one of the tasks performed by the Copyright Board of Canada. The Board, an administrative tribunal established in 1989, is responsible for setting the tariffs, based either on agreements between the parties involved or following a public hearing. The Board tries to ensure that tariffs are both reasonable for the user and just compensation for the copyright owner. The Board and its predecessor, the Copyright Appeal Board have been setting tariffs since the thirties for over twenty different uses of music.

### Collectives play vital role

Copyright owners often belong to collectives, such as SOCAN, the Society of Authors, Composers and Music Publishers of Canada, who work as agents for the creators and often appear before the Board on their behalf. The collectives and the users of copyright material each marshal evidence to support their position before the Board. This often leads

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them to Statistics Canada and the Culture Statistics Program (CSP) for information on the economic milieu of the broadcasting, music and cable television industries where intellectual property is produced and distributed, and for more particular information on the extent and use made of the intellectual property.

### Retransmission rights

A new kind of copyright, the "retransmission right", was created by legislation in 1990, as part of the Free Trade Agreement with the United States. It is the copyright that exists in the created works that are carried on television signals. This includes the right to the music embedded in these programs, and also the rights in other created materials in programs. The Board was given the mandate to establish the price for this right and is required to set a retransmission fee that is "fair and equitable" for broadcast television signals that are picked up and retransmitted by cable companies. Before 1990, Canadian cable companies had been picking up American broadcast signals, such as ABC or PBS, from the air and retransmitting them to their subscribers. In many cases these signals were retransmitted far beyond their local broadcasting areas where they could be picked up with conventional equipment. American cable companies had been paying royalties for the retransmission of similar distant signals (including some from Canada) since 1978, and some American commentators had frankly described the free use made of these signals by Canadians prior to 1990 as "economic piracy". The task of setting fair rates for this use was given to the newly created Copyright Board.

### Board's first hearing

The Board held its first hearing over a five month period in 1989 and 1990 when it heard from thirteen different parties. The parties had already agreed to have the tariff set for more than a year. The Board had to decide on an appropriate structure for the tariff and also estimate the total "quantum" that would be generated by the tariff paid by the cable companies. This sum then had to be allocated among the nine collectives that had formed to represent different groups of creators. These collectives, developed in response to the new law, represent such groups as

### Editor's note

*As the tariff does not apply to the retransmission of local signals, a further breakdown of the basic data was required. To accomplish this, CSP staff designed a custom methodology in collaboration with the Copyright Collective of Canada (representing mostly American creators and in particular, members of the Motion Picture Association of America). Once the design was completed, the Collective undertook to assemble information on local and distant signals for all cable systems in Canada. The CSP was then able to integrate this new information into the existing system to meet the special needs of the Board and the collectives.*

*Customizing an existing system is not a new endeavour for the CSP. In fact, the Television Viewing Bank is itself built on data collected each year by BBM (Bureau of Broadcast Management) to provide information on audiences to advertisers and broadcasters. As is often the case, the data that are useful for one purpose do not measure exactly the phenomena of interest to someone else. However, the CSP solved this problem and added considerable value to the original data by developing and integrating a scheme that, amongst other things, classifies programs by "genres" such as sports, news or drama.*

American professional sports, the creators of U.S. films programs shown on television, creators of Canadian programming, television broadcasters whose signals are retransmitted, and so on.

### Evidence before the Board

The Board decided to use a hybrid approach to the allocation question using data on both program supply and viewing provided by the Television Viewing Bank of the Culture Statistics Program. Since the data bank is based on title, it was possible to produce tabulations of the viewing of programs owned by members of the various collectives, once the ownership of specific programs had been agreed upon by the various participants. The innovative efforts of the CSP staff (see side box for additional details), coupled with their willingness to collaborate with the collectives, resulted in the Board receiving the specific information it needed to carry out its mandate.

### Second . . and third decision

The Board produced its second decision on retransmission in January 1993. This decision maintained the general outlines of the first which ran until December 1991, and set a three year tariff that expired in December 1994. It too used viewing statistics compiled by Statistics Canada. The Board will hold a third hearing in the late spring of this year to set the retransmission tariff until 1997. This latest hearing will be almost exclusively concerned with the question of the distribution of the revenues collected amongst the collectives since the parties have agreed on the structure,

the tariff, and the total that it ought to generate. Again the Board expects to rely on statistics generated by the Culture Statistics Program.

### Board counts on Statistics Canada

In addition, other Statistics Canada data are used to flesh out background information and to describe the cultural industries who use copyright material. In the retransmission tariff, the Board was concerned about the cable industry's ability to meet its tariff obligation and received data on the comparative health and profitability of the cable industry and other sectors of the telecommunications industry. The same kind of information is being used in the current hearing into the tariff for the transmission of the new specialty, or nonbroadcast television signals.

Without going into the whys and wherefores of the music tariffs, the Board has recognized that they should be increased to reflect increases in the cost of living. This increase was not linked directly to the CPI until 1977, when the indexes available from Statistics Canada were used. In 1988, it was suggested in a hearing that the CPI might overstate increases in costs experienced by the producers of intermediate goods and that a producer price index, such as the IPPI, (Industrial Product Price Index) might be more suitable. Although this issue is not entirely resolved, it was decided that an adjusted CPI would

Continued p. 4

be used. This debate would, of course, have been quite fruitless if Statistics Canada material had not been available.

#### And in conclusion . . .

In conclusion, both the statistics that are readily available in Statistics Canada publications such as the CPI figures, and other indexes, as well as those that are tailored for the Board, allow it to set reasonable rates. These statistics also allow it to assert with some confidence the effect of the tariffs on key variables such as profits or revenues or the use of various types of copyright material within the cultural industries. □

### Time for Travel . . . Time for Culture Attendance at cultural events by Canadian travellers, 1992<sup>1</sup>

*Ruth Martin, Head, Research, Analysis and Development Unit, Education, Culture and Tourism Division*

Many Canadians attend cultural events such as a play or concert<sup>2</sup>. In 1992, 30% of all Canadians 15 and over, at home or while travelling, went to a performing arts presentation<sup>3</sup>.

Travellers are a sizeable group of potential consumers of cultural events, given that 72% of Canadians took at least one overnight non-business trip in 1992<sup>4</sup>. When Canadians travel, however, their participation in cultural activities varies widely, with the likelihood increasing the further they get from home.

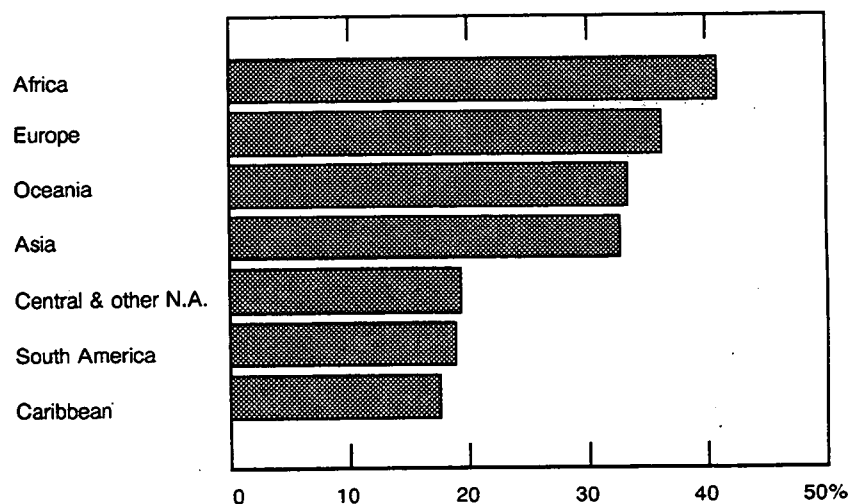
#### Destinations provide cultural diversity

Most trips Canadians take are within Canada. This means that the number of person-trips that include attendance at cultural events is highest for domestic travel. In 1992, such participation was recorded during 2.8 million person-trips. The comparable volumes for Canadians travelling in the United States and overseas were 1.6 million and 787,000 respectively.

However, when one looks at participation in terms of the proportion of total trips taken, the pattern reverses. Fully one in four person-trips to overseas

Figure 1

#### Highest proportion of Canadian travellers overseas attend cultural events in Africa and Europe



Source: International Travel Survey 1992

destinations included attendance at cultural events compared to 8% of trips to the United States and just 3% of domestic travel.

While visiting overseas destinations, the chances that Canadians will attend cultural events are highest in Africa (Figure 1). Europe, number one by volume, ranks second. Undoubtedly, many Canadians travel to other continents largely **because** they want to experience cultural diversity.

In the United States, the South Atlantic region (all sea-board states south from Delaware, and the District of Columbia and West Virginia) receives the largest volume of Canadian travellers. This region also records the highest attendance at plays and concerts. But even so, the proportion of Canadians attending cultural events there was only one third of that in Hawaii in 1992.

Within Canada, a substantially higher proportion of Canadians choose to attend cultural events while visiting Prince Edward Island than any other province of destination. One in ten attend presentations such as the play *Anne of Green Gables* during their stay in P.E.I.

#### More time for culture?

One reason that the likelihood of attending cultural events is higher for overseas trips is that these tend to be

lengthier trips. As trip duration increases, the number of activities one participates in generally increases as well.

On average, Canadian travellers spent 19 nights on a trip overseas during 1992. Trips to the United States, on the other hand, averaged seven nights while domestic trips lasted about three nights. Regardless of destination, travellers who attend cultural events report notably longer trips than other Canadians.

But even when trip duration is held constant, Canadian travellers are more likely to attend cultural events in foreign countries (Figure 2).

<sup>1</sup> All 1992 person-trips of one or more nights and, for travel within Canada of at least 80 km from home, are discussed throughout this article.

<sup>2</sup> While data exist on a much wider range of cultural activities than attendance at a play or concert, for various operational reasons, this analysis looks only at this one activity.

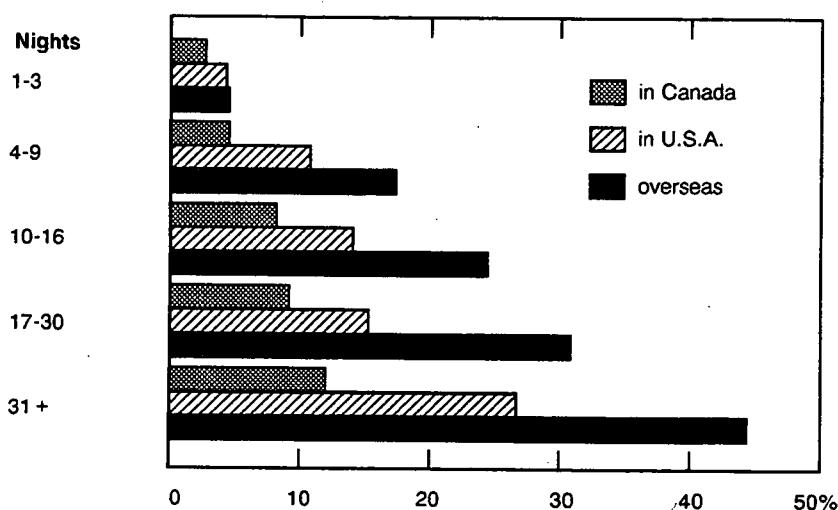
<sup>3</sup> General Social Survey, Statistics Canada, 1992.

<sup>4</sup> Domestic Travel 1992 Statistics Canada Catalogue No. 87-504, p. 40.

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Figure 2

### Canadian travellers more likely to attend cultural events on longer trips



Source: International Travel Survey and Canadian Travel Survey 1992

### Culture has ageless attraction

While Canadians of all ages attend cultural events when they travel, all destinations considered, children under 15 years of age were the least likely to attend plays and concerts on trips during 1992. Meanwhile, the next youngest age group, those aged 15 to 24, reported the highest participation in cultural events among Canadians travelling domestically and overseas.

Among 15 to 24 year olds who took long trips overseas (for more than 17 nights), more than half attended a play or concert. This might be related to the fact that many young persons travelling for educational study would likely participate in cultural activities.

Among Canadians taking long trips in the United States, the oldest travellers, which would include those going south during the winter months, stand out. More than twenty percent of those aged 55 and over took in a cultural event while visiting the United States.

Table 1.

### Percentage of Canadian Travellers Attending Cultural Events, 1992, by Destination, Trip Purpose and Trip Duration

	1-3 nights	4-9 nights	10-16 nights	17+ nights	Average
	%	%	%	%	%
<b>In Canada</b>					
Pleasure	3.6	4.8	9.8	7.6	4.2
Visiting friends/relatives	2.3	4.7	8.4	12.1	3.1
Business or convention	1.5	3.2	5.6	12.5	2.0
Other/not stated	3.1	2.8	0.4	3.4	3.0
<b>In the U.S.A.</b>					
Pleasure	4.0	8.9	11.0	20.0	7.8
Visiting friends/relatives	6.5	13.8	25.2	20.3	11.2
Business or convention	4.2	13.8	24.7	24.2	8.9
Other/not stated	3.0	17.5	15.6	23.5	6.9
<b>Overseas</b>					
Pleasure	N/A	16.9	24.7	38.7	25.2
Visiting friends/relatives	N/A	17.0	22.5	27.5	24.9
Business or convention	N/A	18.9	23.8	37.3	23.8
Other/not stated	N/A	16.0	28.9	43.6	32.4

Source: International Travel Survey and Canadian Travel Survey.

The pattern of rising attendance at cultural events as the distance from home increases, can be observed for every age group.

### Trip purpose impacts

Although people sometimes take a trip for a mixture of reasons, their main trip purpose affects their propensity to attend cultural events (see Table 1).

Within Canada, business travellers, on average, are the least likely to attend cultural events. But, this is largely because most domestic business trips are brief, 1 to 3 nights in duration. When trip duration is held constant, business travellers are among the most likely to include a play or concert, regardless of destination.

On average, those who travel in Canada for pleasure (a category which includes travel for the purpose of attending events and attractions), are the most likely to attend a cultural event. On trips to the United States, Canadians visiting friends and relatives are most likely to participate in a cultural activity.

However, overseas, it is those travelling for other purposes, which includes educational study, who have the highest propensity to attend plays and concerts, especially during long trips.

### And when they are not at plays and concerts...

For those domestic travellers who attended cultural events, the second most popular activity they also undertook was visiting friends and relatives. This is not surprising, given that visiting friends and relatives was the most frequently reported activity overall in 1992 and staying with friends and relatives is the most popular type of accommodation during domestic travel.

However, among all Canadians travelling in the United States and overseas, shopping and sightseeing were the most popular activities. Those attending cultural events outside Canada ranked these activities second and third.

### Conclusion

The likelihood of attending plays and concerts while travelling depends on many factors. However, knowing the destination and trip duration can help

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one predict whether Canadian travellers will choose to take time for culture. Statistics Canada's national travel surveys collect a wealth of information, including participation by travellers in a number of cultural activities. In addition to attendance at plays and concerts, which has been discussed in this article, these other cultural activities include:

- attending festivals or fairs;
- visiting a zoo, museum or natural display;
- attending sports events; and
- visiting a national, provincial or regional park, or historic site.

Given the increasing trend in travel by Canadians, their characteristics are of growing interest to a variety of

professionals in the tourism industry. Data collected through the Canadian Travel Survey and the International Travel Survey can assist in defining and tracking the cultural activities in which Canadian travellers participate. In addition, these surveys provide a wide range of geographic, socio-economic and trip characteristics for further analyses. □

## New Working Group to be in Tune with the Sound Recording Industry

Over the past year or two, there has been an increasing need for information on the sound recording industry. In particular, as a result of work done for the Task Force on the Future of the Canadian Music Industry<sup>1</sup>, a number of concerns have been raised about the adequacy of data currently available to meet the research needs of both the private and public sectors. Data needs themselves are undergoing significant change as the reality of recording production and distribution technologies change at an ever increasing pace (see "Where Culture Meets the Bottom Line . . . Change in format produces rapid growth in revenues in the record industry" in *Focus on Culture*, Autumn 1994, Vol. 6, No. 3). In addition, advances in information processing have raised expectations of easy and rapid access to research and statistical products and services that are comprehensive and reflect current conditions.

In many areas, private sector companies are becoming concerned about the increasing burden of responding to surveys in addition to completing a plethora of other documents for government and other organizations. There has been an ongoing call for a more harmonized approach from federal and provincial departments, agencies, arts councils, and the private sector when developing surveys.

In response to these issues, recent discussions between associations involved in the sound recording industry, the Department of Canadian Heritage and Statistics Canada have underlined the need for researchers, information users and data gatherers to review their respective positions and determine how best to meet the information needs of the industry. As a first step, a number of recording industry representatives met with staff from both government departments and Industry Canada, in Ottawa on February 17, 1995.

This meeting covered a variety of issues. An overall assessment was made of the existing Statistics Canada Sound Recording Survey questionnaire, which, while needing improvement in some areas, was generally considered a good vehicle and should be continued. What is needed, however, are data on additional areas, such as copyright and emerging technologies. The second major initiative was the interest expressed by all attendees in being involved in a new joint working group. The initial objective of the working group<sup>2</sup> would be to develop a strategic plan within which to improve statistics on the industry. This will include work on the Statistics Canada survey as well as integrating and harmonizing all existing databases to make the best use of all available information. This would ensure a consistent set of statistics

being used by the industry, government policy makers and other users.

While the initial meeting of this working group took place in Toronto on March 23, as part of the Canada Music Week events, the hope is that all interested individuals and organizations can be involved in the processes of redesigning the Statistics Canada survey and developing a statistical framework. Interested parties should contact Mary Allen, Coordinator, Development and Data Integration, Culture Statistics Program, at (613) 951-1544 or fax (613) 951-9040.

- 1 Refer to *Focus on Culture*, "Canadian Sound Recording Industry Looks at Impact of New Technology", Winter 1993, Vol. 5, No. 4, for information on this task force.
- 2 With representatives from at least the Department of Canadian Heritage, Statistics Canada, Industry Canada, the Department of Foreign Affairs, the Canadian Independent Record Production Association (CIRPA), the Canadian Record Industry Association (CRIA), the Association québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ), the Society of Composers, Authors and Music Publishers of Canada (SOCAN), the Canadian Music Publishers' Association (CMPA), the Society for Reproduction Rights of Authors, Composers and Publishers in Canada (SOCRAC), and Factor/Musicaction Canada (FMC). □

## SELECTED INDICATORS

### Participation in Cultural Activities

Indicator	Total	Male	Female
<b>Participation during 1992 (%)</b>			
Read a newspaper	92.1	92.3	91.9
Read a magazine	79.7	76.0	83.4
Read a book	66.0	56.8	74.8
Borrowed a book from a library	33.8	29.7	37.8
Listened to tapes, CDs	80.6	81.1	80.1
Viewed a film on VCR	70.8	72.8	68.9
Attended popular music performance	23.7	25.5	22.0
Attended professional dance, music, opera, theatre	30.2	27.5	32.8
Dance	4.9	3.7	6.1
Symphonic or classical music	12.2	10.6	13.8
Opera	4.4	3.8	4.9
Theatre	24.0	22.3	25.7
Childrens' theatre, dance or music	8.4	6.5	10.3
Attended professional sporting event	31.2	40.6	22.2
Went to the movies	48.6	50.4	46.9
Visited a museum or art gallery	32.3	31.8	32.9
Went to a festival or fair	50.5	52.0	49.1
Did an individual art activity (e.g. painting)	10.1	9.3	10.9
Did any craft (e.g. pottery, jewellery)	30.5	14.7	45.7
Practiced a musical instrument	17.8	19.3	16.3
Did artistic photography	9.0	10.3	7.9

## Publications

Still available	\$Cdn		
87-202 Sound Recording, 1992-93	\$24.00	87-207 Heritage Institutions, 1991-92	\$30.00
87-203 Periodical Publishing, 1992-93	\$20.00	87-208 Television Viewing, 1993	\$28.00
87-204 Film and Video, 1992-93	\$24.00	87-209 Performing Arts, 1992-93	\$30.00
87-206 Government Expenditures on Culture, 1992-93	\$20.00	87-210 Book Publishing, 1992-93	\$20.00

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

The paper used in this publication meets the minimum requirements of American National Standard for Information Sciences - Permanence of Paper for Printed Library Materials, ANSI Z39.48 - 1984.



### *Did you know . . . ? Highlights of the 1993-94 Sound Recording Data*

The sound recording industry posted another successful year in 1993-94 with total sales by record companies up 16.5% to \$738 million. Profits for 1993-94 were up 3% to \$140 million.

Sales of recordings with Canadian content now represent nearly 13% of total sales compared with only 8% five years ago. In 1993-94, sales of Canadian recordings reached a record high of \$92.7 million, up 30% from the previous year.

The number of new recordings released with Canadian content rose by 7.5% from 1992-93. By comparison, the number of new releases of non-Canadian recordings rose by less than 1%. Of the total recordings sold, CD sales dominate the market, accounting for 58% of all units sold.

For additional information from the 1993-94 Sound Recording Survey, please contact Erika Dugas at 613-951-1568.

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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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