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This issue of **Focus on Culture** is dedicated to publishing the results of the recent Cultural Labour Force Survey. It is, therefore, not typical of a standard issue. **Focus on Culture** is a quarterly bulletin of the Culture Statistics Program. Each regular issue includes three or four articles on new results and analyses from any of about a dozen culture surveys, including performing arts, heritage, sound recording, radio and television viewing, film production and distribution, print media, and more. It is designed in an easy to read format, using graphs, special features and supplements on topical issues, to bring you a clear, concise picture of culture in Canada. We would welcome the chance to have you as a regular subscriber.

HRDC Comments on the CLFS

The recent release of data from the Cultural Labour Force Survey (CLFS) marks the culmination of an extensive effort by Human Resources Development Canada (HRDC), Statistics Canada, and individuals and agencies in the cultural sector to provide labour market and training information about cultural workers: The intent of the survey was to provide information that would aid in the development of training and employment programs that would better meet the needs of those working in the cultural sector.

The survey has gone a long way in filling the long-standing information gap about individual employment patterns, workforce attachment, educational attainment, the impacts of technological change, and unmet training needs in the cultural sector. Due to the high number of multiple job holders in the cultural sector, this information was previously unavailable from existing surveys of the Canadian labour force.

The survey results indicate that the cultural labour force is indeed very dynamic and flexible. The high incidence of self-employment and multiple job holding exemplifies emerging labour market trends and calls for innovative approaches to training and development.

These results, along with the findings from the cultural sector studies released earlier this year, should provide the newly established Cultural Human Resources Council with a solid analytical foundation to implement their human

resource strategy. In this regard, the Minister of HRDC recently approved an investment of \$2.5 million for professional development in the cultural sector. This funding will be delivered to the sector through the CHRC. The CHRC is one of 17 sector councils created to provide employers and workers in a variety of Canadian industries with a permanent forum to collaborate on human resource development and training strategies.

Cultural Labour Force Survey

The results of the Cultural Labour Force Survey focus on 157,000 people undertaking paid or unpaid, but career-oriented, work in 1993 as artists, managers, other professionals and technicians in 11 selected areas:

- **arts** - visual arts, crafts, literary arts, performing arts
- **cultural industries** - film and video, broadcasting, sound recording, book publishing, periodical publishing,
- **heritage** - heritage institutions and public libraries.

Survey results are grouped as follows: employment status (self-employed, multiple jobs); worker characteristics (occupations, skills, education, gender); income; training and impact of technological change; provincial variations.

Employment Status

Results from the survey indicate that the cultural sector workforce has several distinct characteristics. The key characteristics are the high levels of self-employment and education, the prevalence of multiple jobs within the sector and the wide variation in the income earned from cultural activities.

The cultural sector labour force "represents the work force of the future: self-employed, entrepreneurial and highly motivated." *Creating Careers, Human Resources Issues in the Cultural Sector, January 1995.*

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Note to readers

The Cultural Labour Force Survey was commissioned by Human Resources Development Canada (HRDC) to gather information for the development of training and employment programs in the cultural sector. The results focus on patterns of employment in 1993, worker characteristics such as education and skills, income, training and the impact of technological change.

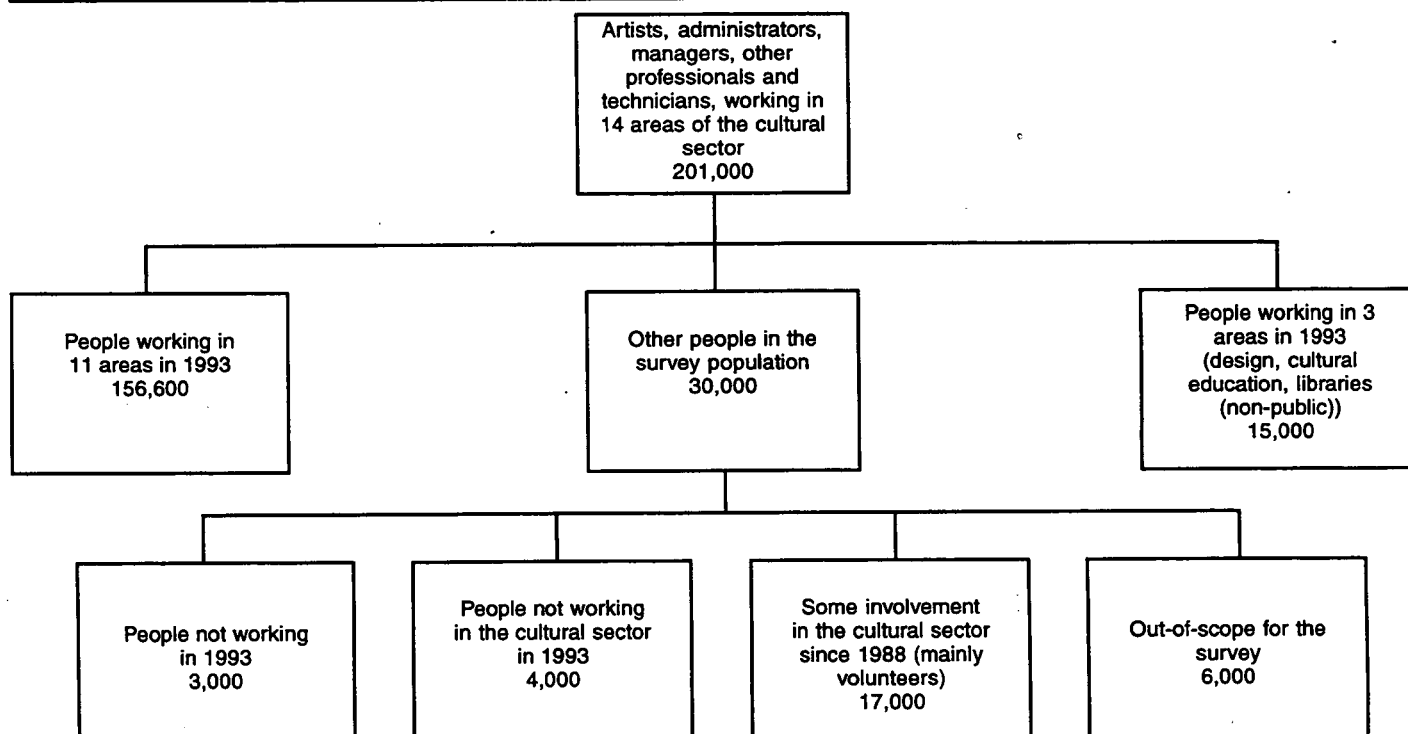
Data relating to non-surveyed areas of the cultural sector (telecommunication carriers, printing, distribution and retailing, in addition to support personnel) as well as the cultural sector in its entirety, are available from the 1991 Census of Canada and other Statistics Canada sources. Analysis of these data shows that the cultural sector in total represents a significant part of the Canadian economy. It has a direct economic impact estimated at \$16 billion (2.7% of gross domestic product) and a labour force of more than 670,000. Since 1981, the cultural labour force has grown approximately 32%, compared with a 15% growth in the total labour force.

These Census figures are significantly higher than those from the Cultural Labour Force Survey. For the conducting of the Cultural Labour Force Survey, HRDC required a concentration on the training needs of only certain artistic and other related cultural workers, and hence a survey frame was selected consisting of an estimated 201,000 individuals who had worked for pay since 1988 in any of 14 selected areas of the cultural sector: visual arts, crafts, design, literary arts, performing arts, film and video, broadcasting, cultural education, sound recording, book publishing, periodical publishing, heritage institutions, public libraries and other libraries. Details on the composition of this survey population, the removal of ineligible units and the resulting final counts are in the chart below. You will notice that those workers who were identified through their affiliation with associations, unions, etc. in the 3 areas of design, cultural education and non-public libraries, are not included in the data in this article because the coverage of these sub-sectors was only partial, and the data are

therefore of very limited use. Thus, the results from the survey given here focus on 157,000 paid or unpaid career-oriented individuals working as artists, administrators, professionals and technicians in the 11 remaining areas, in 1993.

The Cultural Labour Force Survey, conducted in 1994, was developed with the extensive co-operation of Human Resources Development Canada, Canadian Conference of the Arts, Canada Council, Department of Canadian Heritage and many other individuals from the cultural community who provided expert advice on content and coverage. In addition, more than 1,000 cultural organizations provided membership or employee lists to help develop the list of people from which the survey sample was drawn.

The occupations included in the results are based on the Standard Occupation Classification (SOC) of 1991. This classification provides additional detail on cultural occupations, such as craftspeople and arts administrators, which is not available from the previous Standard Occupational Classification, of 1980.



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self-employment levels high

Cultural workers were two times more likely than the average Canadian worker to be involved in self-employed work only (29% of this group versus 15%¹ of total employment). An additional 24% were self-employed, but also held jobs as employees in 1993. More than 54% of arts workers were only involved in self-employed work, while the levels for cultural industries workers and heritage workers were lower (30% and 1% respectively).

multiple jobs common

Forty percent of individuals surveyed held two or more distinct jobs in 1993. The 156,600 cultural workers surveyed held a total of 246,600 jobs, for an average of 1.6 jobs per person (see Table 1).

Cultural workers who were both self-employed and employees held an average of 2.6 jobs. Jobs for self-employed cultural workers are defined to represent each separate profession in which they were involved. For example, a person who is working as a painter and as a freelance journalist is deemed to have two jobs.

The survey also found that many of the multiple job holders held one or more jobs in occupations outside the cultural sector. Twenty-two per cent of these people had their primary⁴ occupations outside the sector.

Of cultural workers surveyed, 38% of the people had an artistic primary occupation, 15% were administrators or managers, 12% were professionals, 17% were technicians, 8% were clerical, sales and manual workers and 10% had primary jobs outside the cultural sector. For 75% of people who were artists, their job as an artist was their primary one. In total, 86% of the jobs, whether primary or not, were found in the cultural sector.

Table 1

Number of Jobs² Held by Employment Status³

Employment status	Number of people				Total jobs	Average number of jobs/ person
	Number of jobs/person			Total		
	1	2	3+			
Self-employed only	33,300	9,100	3,300	45,800	61,900	1.4
Employee only	60,200	11,100	2,300	73,600	89,400	1.2
Both self-employed and employee	0	22,200	15,000	37,200	95,300	2.6
Total	93,500	42,400	20,600	156,600	246,600	1.6

Table 2

Primary Jobs and Total Jobs Held, by Occupation

	Primary Jobs	Total Jobs
Artists	58,800	101,600
Painters, sculptors and related artists	7,000	10,700
Craftspeople	2,700	4,000
Designers	2,600	4,300
Directors, producers and choreographers	8,900	13,100
Musicians and other music occupations	13,200	26,000
Dancers	1,300	2,600
Actors and other performers	7,200	13,700
Writers	8,400	16,300
Other writing occupations	7,500	10,900
Other jobs within the cultural sector	83,000	111,300
Arts and cultural industries managers	5,100	6,400
Heritage managers	4,700	5,300
Other administrators, managers and supervisors	14,000	17,200
Curators	3,000	3,600
Librarians and archivists	3,800	4,300
Teachers	7,700	15,700
Other professionals	4,400	6,100
Film, performing arts and broadcasting technicians	10,300	15,600
Library technicians	4,800	5,700
Museum technicians	5,400	6,400
Other technicians, skilled and semi-skilled workers	6,500	8,300
Clerical, sales, service and manual workers	13,300	16,700
Other jobs outside the cultural sector	14,900	33,700
Administrators, managers and supervisors	3,100	5,800
Professionals	4,400	9,400
Technicians, skilled and semi-skilled workers	2,500q	4,800
Clerical, sales, service and manual workers	4,900	13,700
Total Jobs	156,600	246,600

NOTE: In all tables, the following symbols are used:

- amount too small to be expressed, and not released because coefficient of variation is greater than 25%
 q estimates have a coefficient of variation between 16.5% and 25% and are less reliable than unmarked numbers

The Canada Council will use the CLFS to look at the impact of its funding on artists, as well as how artists support their creative work through other jobs both within and outside the cultural sector. It will also be able to gauge better its potential client base in different artistic disciplines and the various regions of the country. The wealth of information in this survey will be very useful to the Council for several years to come. C. McCaughey, Canada Council.

¹ Statistics Canada Labour Force Survey, Annual Averages, 1993, unpublished data

² Jobs are defined in terms of usual duties or activities performed for an employer or as a self-employed person for a usual wage, salary, fee or payment (i.e. for a self-employed person the occupation defines a job, not the contract).

³ Employment Status: This variable classifies people who reported working during 1993 into: (i) employee only - those who worked only for someone else for wages, salaries, commissions or payments "in kind", (ii) self-employed only - those who worked only for themselves, with or without paid help or (iii) both self-employed and employee - those who worked both for themselves and for someone else.

⁴ Primary Job is defined as the one with the most hours worked in 1993. This definition is consistent with Census and Labour Force Survey definitions.

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The results of the cultural labour force survey are clear - cultural workers, and artists in particular, have been challenged by new technologies (and will continue being so) and often lack the financial resources required to obtain the relevant education/training to meet the new demands. Obviously, more effort must be put into this critical area. While new technologies present a challenge for the sector, they also present opportunities. Keith Kelly, National Director, Canadian Conference of the Arts.

Of those cultural workers who were self-employed in their primary occupation, 76% were artists. Of these, craftspeople were the most likely to be self-employed only (77%), followed by musicians (70%) and writers (69%). Dancers were the least likely (30%) of all artists to be self-employed only. On the other hand, of all artists, only the category of other writing occupations had more than 30% of workers as employees only. This can be compared with persons working in other jobs within the cultural sector, where fully 72% were employees only. Of those people who were both self-employed and worked as an employee in 1993, the proportions working as artists and in other jobs within the cultural sector, were about equal.

Profile of Cultural Workers skilled jobs predominate

The survey results dispel the stereotype that artists tend to supplement cultural income by working in sales and service occupations. Most (88%) of all jobs held by cultural workers surveyed were managerial (such as production managers, arts administrators, museum directors), professional (such as artists, teachers, librarians), or technical (such as stage hands, sound editors, museum technicians). For persons whose primary occupation was as an artist, 89% of other jobs held were professional, managerial or technical.

high levels of education

Most people in the cultural labour force survey reported receiving some education at the post secondary level - be it in university or otherwise. Forty-five percent of those surveyed had university degrees, compared with 15% of the total Canadian labour force⁵. Only 23% of the survey respondents reported having secondary school or less as their highest level of schooling.

Artists generally were highly educated, with 67% having some university education, although the level varied from 41% for dancers to 83% for writers (followed by directors, producers and choreographers at 72%). Of non-artistic occupations within the culture

sector, teachers were the most highly educated, with 96% having some university, followed by heritage managers (83%) and other professionals, at 75%.

males predominate in the cultural industries, females in heritage

About 51% of the population surveyed was male, but 55% and 58% of arts occupations and cultural industries respectively were male while 62% of the heritage workers were female. The total Canadian workforce is split 45% female, 55% male. Among all artists, there were more women than men working as dancers (77%), craftspeople (70%), painters, sculptors and related artists as well as other writing occupations (58%), and as designers (55%). Among other jobs within the cultural sector, in 7 out of the 12 occupations, women were in the greatest numbers, and in fact, in the occupations of curator and library technician, females were about 90% of the workforce.

On the other hand, there were more males than females in the professions of director, producer and choreographer (64%), musician and other music occupations (also 64%), actor and other performers (66%) and film, performing arts and broadcasting technicians (78%), as well as other technicians, skilled and semi-skilled workers within the culture sector (79%).

Incomes for Occupations Vary Considerably

The average (mean) income (both cultural and total income) varied significantly depending on the occupation. Visual artists (painters/sculptors)

who reported income for activities within the cultural sector (wages and salaries, freelance fees, royalties, grants, etc.) had the lowest average cultural income at only \$7,800. However, if all their sources of income (cultural income, non-cultural employment earnings, interest, social benefits, etc.) are taken into account their average total income reached \$14,100. Cultural teachers had the highest average cultural income at \$51,400 and the highest average total income at \$52,600. Among artists, the average total income was significantly higher (by at least one third) than the average cultural income for visual artists, musicians and writers.

In 1993, the mean total income for the entire Canadian employed labour force was \$30,200. Of all artist occupations, only directors, producers and choreographers, as well as actors, had average total incomes above this figure, while all other occupations were below the average, and in the case of visual artists, craftspeople and dancers, far below (see Table 3). Looking at other jobs within the cultural sector, it is easily seen that teachers and managers had total average incomes far exceeding the national average.

Since the income in the cultural sector may vary considerably within any occupation group, it is useful to analyze median income (the dollar value that falls in the middle of all incomes reported, with half of the incomes below the median and half above). For most cultural occupations, the median incomes (both cultural and total) were lower than the means, and in some cases such as visual artists, musicians, actors and writers, the median incomes were much lower. This fact of lower median than mean incomes occurs because of the reduced influence of a small percentage of highly successful artists whose income greatly affects the mean.

The results of the Cultural Labour Force survey offer important indicators for researchers and policy-makers who wish to come to grips with the employment impacts of the unfolding "information highway". By charting the growth, and understanding the needs of this sector, we are better able to assess a significant aspect of the knowledge economy. Liss Jeffrey, Senior Research Associate, McLuhan Program in Culture and Technology, University of Toronto

The information [from the survey] is both impressive and of great practical use, supplying information never before available in this form. It will be very valuable to the music industry for use in both the public and private sectors. Brian Chater, Canadian Independent Record Production Association (CIRPA).

⁵ 1991 Census of Canada

Table 3
Average and Median Incomes for Primary Occupations, 1993

	Cultural Income		Total Income	
	Average ⁶ \$	Median \$	Average ⁷ \$	Median \$
Artists	20,300	11,500	25,400	19,400
Painters, sculptors and related artists	7,800	4,000	14,100	10,000
Craftspeople	12,300q	8,000q	15,500	12,000
Designers	26,800	22,000	28,500	25,000
Directors, producers and choreographers	35,800	32,000	37,800	36,000
Musicians and other music occupations	13,700	9,000	20,300	15,000
Dancers	14,400	11,800	16,300	16,800
Actors and other performers	29,300q	13,500q	31,600q	16,000q
Writers	15,300	7,500	23,500	16,000
Other writing occupations	23,400	16,300	29,600	25,000
Other jobs within the cultural sector	31,300	27,000	34,600	30,000
Arts and cultural industries managers	42,400	35,000	44,700	37,000
Heritage managers	39,900	40,000	40,300	41,000
Other administrators, managers, supervisors	39,100	32,000	41,400	35,000
Curators	24,500	21,000	26,300	24,000
Librarians and archivists	27,000	30,000	30,700	30,000
Teachers	51,400	52,000	52,600	54,000
Other professionals	33,100	28,800	36,200	32,000
Film, performing arts, and broadcasting technicians	35,400	33,000	37,500	38,200
Library technicians	18,500	20,000	20,700	21,000
Museum technicians	14,300	13,000	21,600	21,900
Other technicians, skilled and semi-skilled	28,400	24,800	34,100	32,000
Clerical, sales, service, manual workers	17,200	16,500	20,500	20,000
Total of cultural workers	27,000	21,800	30,900	26,000

Training and Technological Change

Training and technological change are key issues throughout the work force.

Workers in the sector are highly educated and trained, and many, especially the creators are independent. As such they are not part of a major employer with in-house training programs, they do not have an effective training infrastructure. ...
Creating Careers Human Resources Issues in the Cultural Sector, January 1995

Impact of technological change high

Recent changes in technology are a prime influence on identified training needs. Sixty-five per cent of the cultural work force reported that since 1990, their involvement in their occupation had been affected by technological change, while 43% of these people reported that they had received training as a result of the technological change experienced. The highest incidences of

technological change were reported by directors, producers and choreographers (see Table 4), who also recorded some of the lowest levels of related training. The next highest levels of technological change were experienced in the management and administration areas, areas which also reported receiving some of the highest levels of training. The two artist groups who reported themselves least affected by technological change were craftspeople and dancers. While on average, the artists and other cultural sector occupations reported comparable levels of change due to the impact of technology on their jobs, there is a significant difference in the proportion of artists and others who received training as a result of the technological change experienced. On average, 28% of artists received training, while 56% of persons working in other jobs within the cultural sector benefited from training. In both groups, females reported a higher incidence of training than males.

Same types of technological change experienced by everyone

Artists and others working within the cultural sector, as well as those working outside the sector, all reported experiencing different types of technological change in similar proportions. That is, almost 50% of artists and 60% of other workers in the cultural sector reported the use of computers as the most common technological change experienced since 1990. Similarly, the use of fax machines, other equipment, digital music, video, satellites, etc. were all reported as technological changes, in about equal proportions by artists, other cultural workers and those whose primary job was outside the cultural sector.

Self-learning most prevalent

Of all types of education received, both formal and informal, on-the-job training or self-learning was reported most often (37% of all sources), followed by university (17%), then workshops (12%), courses (8%), college (6%), private lessons (6%), and apprenticeship or mentorship (4%). Other methods of education and training

I'm sure I'll find the data in the Cultural Labour Force Survey of great use when making presentations to government, when studying the professional development needs in the [theatre] sector, and when assisting my own membership with information requests. One thing the data show clearly is that the stereotypical artist living off the public purse through grants is a myth - even the artists in the least well-paid sectors are dedicated professionals deriving the majority of their income by practising their craft. Pat Bradley, Executive Director, Professional Association of Canadian Theatres.

The Cultural Labour Force Survey... contains previously unavailable baseline data concerning the employment and training profile of cultural workers in Canada. This information will be useful to the continuing partnership of Human Resources Development Canada, Statistics Canada, the newly formed Cultural Human Resources Council and the Department of Canadian Heritage engaged in searching for new ways of meeting the changing human resource requirements of the cultural sector. Victor Rabinovitch, Assistant Deputy Minister, Cultural Development and Heritage, Canadian Heritage

⁶ Average Cultural Income refers to the weighted mean income of individuals reporting income from cultural work in 1993, net of expenses from cultural work.

⁷ Average Total Income refers to the weighted mean income of individuals reporting income from all sources (including royalties, investment income, unemployment insurance, pension income, etc.) for 1993, net of expenses from cultural work.

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Table 4
Impact of Technological Change and Resulting Training

	Per cent reporting being affected by technological change			Per cent reporting training as a result of technological change		
	Total	Male	Female	Total	Male	Female
Artists	63	69	48	28	25	30
Painters, sculptors & related artists	44	51	39	36q	--	34q
Craftspeople	34	--	38	--	--	--
Designers	76	81	72q	42q	--	--
Directors, producers & choreographers	81	87	69	29q	26q	34q
Musicians & other music occupations	64	74	48q	--	--	--
Dancers	34	--	33q	--	--	--
Actors and other performers	54	56	48q	27q	--	--
Writers	74	75	75	26q	--	29q
Other writing occupations	67	64	69	46	34q	55q
Other jobs within the cultural sector	67	70	67	56	49	63
Administrators, managers & supervisors	80	81	79	69	56	66
Teachers	79	84	71	53	28q	33q
Other professionals & semi-professionals	77	86	72	62	59q	63
Technicians, skilled, semi-skilled workers	57	61	56	53	46	70
Clerical, sales, service & manual workers	49	40	54	57	51q	60
Total of cultural workers	66	70	63	45	38	52

mentioned included private training schools, trade schools, conferences, seminars and tutorials. Respondents were also asked which form of education or training had had the most influence. Self-learning was still the most cited category, and was clearly the most important for all groups but teachers, curators and musicians. Dancers noted the impact of secondary, private or trade schools (11%) as also important.

Both females and males reported college and university as the source for their knowledge and skills with similar frequency (19% and 18% respectively). But men reported on-the-job training more frequently than women in almost all occupation groups (52% versus 43% overall) and women reported professional development training more often (20% versus 16%).

more training wanted but expensive

Although artists, administrators, other professionals and technicians are highly trained, their full professional development needs are not always met. Thirty-two percent indicated that they wanted additional education or training

related to their cultural work, but did not take it, most often because it was too expensive (46%) or they were too busy (32%).

high awareness of HRD programs

One of the ways cultural workers acquire their training is through HRDC training programs. Forty three per cent

reported that they were aware that HRDC training programs existed.

Workforce characteristics vary by province and territory

Cultural workers surveyed were concentrated in the populous provinces (77% in Ontario, Quebec and British Columbia combined), in about the same proportion as the total labour force. About 8% of the surveyed cultural work force lived in the Atlantic provinces, 15% in the Prairie provinces and 0.5% in the North. The median incomes received for cultural work varied among the provinces and territories^a. Of the ten provinces, median incomes for artists were highest in Quebec (\$14,000), while they were lowest (\$6,000) in New Brunswick (refer to Table 5). Incomes in the Northwest Territories were much higher, at \$44,000 (based on 190 artists). When we look at the incomes of other cultural workers, British Columbia median levels were the highest, followed by Ontario, with Quebec ranked a close third.

Let us help you with your data needs

... The key results summarized here only touch the surface of the wealth of information available from the Cultural Labour Force Survey. For example, we also have data on volunteers in the Heritage sector. For additional information about the survey, including the availability of more detailed tables, contact Pina La Novara (telephone: 613-951-1573, or fax: 613-951-9040), Culture Statistics Program, Ottawa.

^a We have chosen to look at median incomes as being the most robust measure for comparison of income levels.

Table 5
Median cultural and total incomes vary by province or territory

	median cultural income - artists	median total income - artists	median cultural income - other cultural work	median total income - other cultural work
	\$	\$	\$	\$
Nfld	10,000	20,000	23,000	24,000
PEI	9,000	15,000	18,000	26,000
NS	8,000	15,000	24,000	26,000
NB	6,000	13,000	25,000	26,000
PQ	14,000	21,000	27,500	30,000
Ont	11,000	20,000	28,000	31,000
Man	9,000	15,000	25,000	27,000
Sask	8,700	14,000	27,000	28,000
Alta	10,000	17,000	25,000	26,000
BC	8,500	14,800	30,000	34,000
Yukon	15,000	20,000	25,250	29,000
NWT	44,000	48,000	47,480	49,700
Canada	11,500	19,400	27,000	30,000

I find the data published by the Culture Statistics Program useful for my teaching in arts marketing; they provide market and industry profiles that are both reliable and exhaustive. François Colbert, Professor, École des Hautes Études Commerciales, affiliated with the Université de Montréal.

The Cultural Labour Force Survey provides essential baseline data to the cultural sector and will be vital in permitting the development of an informed human resources strategy - as well as providing yet more demonstration that jobs in the cultural sector are indeed "real" jobs. Peter Weinrich, Executive Director, Canadian Crafts Council.

The study reports that 46% of workers employed in the visual, literary, performing and audio-visual arts are independent contractors, which clearly shows the importance of self-employment in the cultural industries. This finding is of major significance to the Canadian Artists and Producers Professional Relations Tribunal whose mandate is to administer professional relations between self-employed workers in the cultural sector, and producers under federal jurisdiction, such as the Canadian Broadcasting Corporation, the National Film Board and the National Arts Centre. Canadian Artists and Producers Professional Relations Tribunal

Introducing the CHRC

In this article Marie Palmer, the newly appointed Executive Director of the Cultural Human Resources Council, comments on the role of the Council and the expected role of the CLFS data in achieving her mission.

The newly created Cultural Human Resources Council (CHRC) is a non-governmental organization charged with the development, implementation and coordination of human resource strategies in the arts and cultural sector in Canada. CHRC commenced operation in May 1995 with start-up funds provided by Human Resources Development Canada.

The Council is fundamentally interested in the results coming from the Cultural Labour Force Survey (CLFS). The survey was a major initiative - certainly the staff of Statistics Canada, but also the cultural community generally should be congratulated for their involvement in a task which spans over 5 years of development, planning, consultation, and actual surveying.

It is early in the development of CHRC and hence relatively early in our understanding of all of the uses of the data from the CLFS. However, I am confident that the survey results provide the quantitative data that will lead to

better policies supporting the role of cultural workers in our society, by underpinning the analytical development of a long-term strategy for cultural training in Canada. This analysis will also enable a clearer focus for the Training Initiatives Program, for which funding of \$2.5 million was recently approved by Minister Lloyd Axworthy.

CHRC intends to work in partnership with Statistics Canada and undertake analysis of available data, in order to best position our developing strategies. One of the key strategies identified at this stage is to assist in the improved recognition of the significance of the cultural sector - not only in terms of economics but also in terms of the social and cultural imperatives of Canada. Thus, it is expected, funding permitting, that we will work with Statistics Canada and other interested partners in disseminating CLFS and other data over time. We plan to release a small brochure summarizing the key findings of the Survey before Christmas; develop and release a detailed analytical report drawing together the findings from the survey with the existing cultural sector studies information and recommendations regarding future policy direction; and finally prepare another small, widely-circulated, brochure that summarizes these recommendations. □

Understanding our Changing Cultural Landscape!

Announcing ***Canada's Culture, Heritage and Identity: A Statistical Perspective***, a new publication from the Culture Statistics Program.

Whether you need to enhance your professional knowledge, save research time (and money), or you simply want to be informed about emerging cultural issues, *Canada's Culture, Heritage and Identity: A Statistical Perspective*, is for you.

Drawing on data from Statistics Canada and other sources, this annual compendium will present over one hundred bilingual pages of our most recent research findings, written in an easy-to-read style, complemented by graphs and summary tables. Data on the production and consumption of cultural products and services will be highlighted.

The first section will provide a broad overview of the cultural situation in Canada from an economic, social and demographic perspective. Participation in cultural activities, family expenditures on cultural products and services, and government expenditures on culture will also be described in this section.

The second section will present analyses of topics such as heritage, printed matter and literature, music and the performing arts, visual arts, film and video, radio and television, sports and games, environment and nature.

For \$30 (plus \$2.10 GST) you will receive the premiere issue of *Canada's Culture, Heritage and Identity: A Statistical Perspective* (Catalogue No. 87-211), the most comprehensive publication available on current Canadian cultural issues. To order, please call toll-free 1-800-267-6677 or fax 613-951-1584. □

Did you know...?

The Culture Statistics Program staff recently have been very busy ensuring that new data are into the public domain as quickly as possible after they are received from the respondents. In addition to the major release of the Cultural Labour Force Survey data featured in this issue, a number of the other survey areas have released their 1993/94 data in the past few months. Brief highlights from these data are given here. Detailed standard tables on each of the subject areas, similar to the tables in the discontinued annual publications (refer to "Looking to the Future... An article of first impressions" in *Focus on Culture*, Vol. 7, No. 1, p. 2) are available. Please contact Pina La Novara by telephone at 613-951-1573 or by fax at 613-951-9040 if you would like more information.

- Movie attendance at regular theatres in Canada reached a four-year high of 76.5 million in 1993/94. Even drive-ins had their first resurgence in attendance in four years. Despite the increased attendance, average profits for the regular theatres were down nearly 7%.
- For the first time in five years, film distribution revenue has shifted from the home video market back to motion picture theatres. Distributors of films to theatres reported revenue of \$196.4 million in the fiscal year 1993/94, a jump of almost 15% from the previous year. It was the first increase since 1989/90 when distributors garnered \$225.5 million from the theatrical market. On the other hand,

sales revenue from the home video market took a sharp 9% plunge in 1993/94 to \$121.5 million, following a tremendous rise over the preceding five years.

- The film production industry recorded its best performance ever in fiscal year 1993/94, generating almost \$734 million in production revenue, up 46.9% from four years earlier. The expansion was largely due to the tremendous growth in domestic film exports and consumer demand for home entertainment services.
- Canadian-controlled publishers have seen their book exports boom over the past four years. Domestic sales have remained flat, however, except in Quebec, where sales of books published by French-language firms have soared.
- In 1993/94, total current dollar spending on culture by all three levels of government fell for the first time in at least nine years. In terms of consumers' purchasing power, however, culture has been losing ground to inflation for the past four years.
- Within Canada's periodical publishing industry as a whole, circulation, revenue, and the number of publications have all dropped during the past four years. The major exception has been special interest publications - for example,

publications specializing in computers - where circulation is soaring.

- Canadians, particularly those under 25, are watching less television than they were five years ago. Francophones still spend more time with the tube than anglophones. Overall, Canadians watched an average 22.7 hours of television per week in 1994, a drop of about 30 minutes from 1990 and about 90 minutes over the past decade.
- With both attendance and government grants falling off, Canada's 471 not-for-profit professional performing arts companies are turning more to private donations for help in staying afloat. Donations from private sources have risen 20% over the past five years. Attendance has dropped 3% over the same period. In 1993/94, for the first time ever, actual government grants to the performing arts fell.
- Heritage institutions are earning more than ever from people trying to learn more from Canada's museums, archives, historic sites, exhibition centres, zoos and other related institutions. In 1993/94, admission revenues increased at a faster rate than any other source of revenue for these institutions. This increase coincided with a small rise in attendance, which followed a 4% drop over the previous four years.

How to Find Out More.....

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

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