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Preserving Canada's Natural and Historic Heritage

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*Edited from material being prepared for **Canada's Culture, Heritage and Identity: A Statistical Perspective,** 1997 Edition. The following discussion gives a general overview of heritage institutions and then highlights parks and conservation areas, and heritage rivers. Detailed discussion of historic sites and museums, galleries and archives is contained in the complete publication.*

The geography and history of Canada, in addition to the origins of its peoples, have played a significant role in the shaping of Canadian culture today. Preservation of the past and an understanding of the present make an important contribution to the continuation of a distinctively Canadian culture sector.

Heritage institutions

Activities directed towards the preservation and conservation of Canada's natural and historic heritage include: the designation of land and waterways as having protected or conserved status; the commemoration of noteworthy people and events in Canada's history; the preservation of Canadian documentation such as written and photographic material; and the collection of creative works by Canadians. Heritage activities preserve the Canadian experience for the education and enjoyment of the Canadian public today and in the future.

Total government expenditures on heritage institutions were over $1 billion in 1994-95, having remained fairly stable since 1991-92 (refer to Table 1). Federal expenditures represented 56% of total government spending on heritage institutions in 1994-95 (down 2 percentage points from 1991-92), while provincial/territorial expenditures represented 41% in 1994-95 (up 2 percentage points from 1991-92). The remaining 3% of government spending came from municipal (including regional and other local government) sources. Since 1991-92, federal spending on heritage has shown small but consistent declines. On the other hand, provincial/territorial and municipal spending have fluctuated during this period.

Museums, galleries and archives had the largest share of heritage expenditures for each of the three levels of government. These heritage institutions accounted for 36% of federal, 61% of provincial/territorial, and 69% of municipal heritage expenditures in 1994-95. Nature parks accounted for an additional 30% of the federal heritage budget in 1994-95[1]. At the provincial/territorial level, nature parks and historic sites each accounted for an additional 15% of the heritage institution budget. At the local government level, historic sites accounted for the remaining 31% of expenditures on heritage institutions.

Parks and conservation areas

The geography and the history of Canada are inextricably tied together. The relationship between the people and the land is reflected in all aspects of Canadian cultural life from the works of visual artists to the sports that are played. While representing only 7% of the world's land mass, Canada claims 20% of the world's remaining wilderness. Almost 800,000 square kilometres of land are covered by bodies of fresh water such as rivers and lakes, making Canada the largest source of fresh water in the world. Thousands of wildlife and plant life species live within Canada's 39 land and 29 marine natural regions. The Statistics Canada Survey of Heritage Institutions[2] indicated that in 1993-94 over 56 million visitors enjoyed these regions in 169 parks and conservation areas. This is almost 2 million visitors (4%) more than in 1990-91.

1 *Federal spending on parks includes support to Canada's system of national parks as well as some support to provincial parks.*
2 *The survey of Heritage Institutions covers only those not-for-profit parks and conservation areas that have an educational or interpretive component. Most are government run.*

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Table 1

Government Expenditures on Heritage, 1991-92 to 1994-95

		1991-92	1992-93	1993-94	1994-95
Total Gov't Expenditures on Culture[1]	**($'000)**	**6,053,439**	**6,197,825**	**6,160,831**	**6,125,527**
Total Heritage Expenditures	**($'000)**	**1,113,444**	**1,149,111**	**1,110,418**	**1,108,899**
Federal — Total Heritage	**($'000)**	**641,500**	**629,141**	**624,628**	**622,171**
	(%)	**100.0**	**100.0**	**100.0**	**100.0**
Nature parks	(%)	27.0	25.5	30.4	33.5
Historic parks and sites	(%)	10.8	12.3	9.5	10.8
Museums, galleries, archives	(%)	36.6	34.6	33.0	36.2
Other heritage institutions(2)	(%)	25.7	27.7	27.1	19.6
Prov/Territ — Total Heritage	**($'000)**	**436,926**	**473,289**	**436,413**	**450,860**
	(%)	**100.0**	**100.0**	**100.0**	**100.0**
Nature parks	(%)	13.3	14.4	15.4	14.8
Historic parks and sites	(%)	21.0	16.2	16.8	15.5
Museums, galleries, archives	(%)	57.9	61.9	60.0	61.4
Other heritage institutions(2)	(%)	7.9	7.4	7.8	8.4
Municipal — Total Heritage	**($'000)**	**35,018**	**46,681**	**49,377**	**35,868**
	(%)	**100.0**	**100.0**	**100.0**	**100.0**
Historic sites	(%)	26.4	31.5	34.9	30.8
Museums, galleries, archives	(%)	73.6	68.5	65.1	69.2

***Note:** Totals may not add due to rounding. Municipal spending is on a calendar year basis.*

Source: Statistics Canada, Surveys of Government Expenditures on Culture

1 *Includes intergovernmental transfers. For all cultural fields, these transfers amounted to about $286 million in 1994-95, $351 million in 1993-94, $335 million in 1992-93, and $315 million in 1991-92. Most of these transfers are library allocations.*

2 *Includes expenses associated with other heritage areas and institutions such as historic canals, archaeological sites, zoos and planetariums, and general and administration expenses related to heritage.*

According to the State of the Parks Report (1994)[3] from Parks Canada, Department of Canadian Heritage, Canada's natural regions are facing a number of stresses originating both inside and outside park boundaries. Non-indigenous species, such as purple loose strife and zebra mussels, are threatening the land and marine ecosystems. Pressure from humans in the form of pollution, forestry industries, agriculture, urbanization, tourism and the like, are taking a heavy toll. In recognition of the seriousness of these problems, there has been a growing appreciation of the importance of Canada's natural environment to both our past and our future. This has led to the involvement of not only governments, but also non-governmental organizations, corporations, communities and individuals in the preservation and perpetuation of Canada's unique geographic and ecological regions.

Governments have assumed the largest role in the creation, preservation, and funding of parks and marine conservation areas. Of the 169 areas reporting to the Survey of Heritage Institutions (refer to Table 2), operating revenues from governments amounted to $190 million, or 76% of all operating revenues in 1993-94. Capital revenues received from governments amounted to $62 million, or 97% of all capital revenues in 1993-94. However, operating revenues from government sources have increased in current dollar terms by only 2% since 1990-91. Capital revenues have actually declined by almost 9% over the same period.

There appears to be an increasing reliance on other sources of revenue. Earned revenues from memberships, admission fees and other earned revenues have increased by almost 8% since 1990-91. Revenues from institutional or private corporations, foundations and individuals have almost doubled as a source of operating revenue and almost quadrupled as a source of capital revenue. It is also notable that, as full-time employment has declined (by 10% between 1990-91 and 1993-94), reliance on volunteer services has increased by 32%. Each of these changes indicates a growing community involvement in the preservation of Canada's parks and waterways.

Parks Canada

With the establishment of Banff National Park in 1885, the present system of national parks had its beginning. Today, Parks Canada administers 38 national parks and 2 marine conservation areas, covering approximately 2.25% of Canada's land mass. Several of these parks have been identified by UNESCO as important World Heritage Sites (having heritage resources of global importance), such as Wood Buffalo National Park, Canada's largest national park, established in 1922. By the year 2000, Parks Canada intends to have a national park for each of the 39 natural regions in Canada, and in this way is expecting to administer the protection and preservation of 3% to 4% of Canada's land mass. Parks Canada is also proposing a national marine conservation area for each of the marine ecosystems in Canada, adding 4 more by the year 2000.

The system of national parks and marine conservation areas protects and

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3 State of the Parks 1994 Report, *Parks Canada, Canadian Heritage, Ottawa, 1995.*

Table 2

Selected Indicators for Parks and Conservation Areas, 1990-91 to 1993-94

		1990-91	1991-92	1992-93	1993-94	% change 1990-91 to 1993-94
Number of Institutions[1]		**169**	**170**	**168**	**169**	**0.00**
Attendance	**('000s)**	**54,374**	**54,372**	**53,866**	**56,307**	**3.56**
Revenues	**($'000)**	**314,084**	**310,443**	**311,121**	**312,911**	**-0.37**
Operating Revenues	**($'000)**	**243,799**	**249,359**	**251,304**	**248,866**	**2.08**
Unearned revenues	**($'000)**	**190,153**	**194,736**	**195,065**	**191,006**	**0.45**
Governments	($'000)	189,732	194,224	194,537	190,280	0.29
Institutional/private	($'000)	421	512	527	726	72.45
Earned revenues	**($'000)**	**53,647**	**54,623**	**56,239**	**57,860**	**7.85**
Members and admissions	($'000)	15,336	15,313	15,837	17,781	15.94
Other	($'000)	38,311	39,311	40,403	40,079	4.61
Capital Revenues	**($'000)**	**70,285**	**61,084**	**59,817**	**64,045**	**-8.88**
Governments	($'000)	68,820	60,070	59,274	62,056	-9.83
Institutional/private	($'000)	217	655	312	847	290.32
Other capital revenues	($'000)	1,247	358	231	1,143	-8.34
Expenditures	**($'000)**	**267,135**	**258,392**	**260,166**	**262,910**	**-1.58**
Operating Expenses	**($'000)**	**193,439**	**199,841**	**200,664**	**199,806**	**3.29**
Wages	($'000)	133,804	134,324	137,027	135,919	1.58
Other operating expenses	($'000)	59,634	65,518	63,637	63,887	7.13
Capital Expenses	**($'000)**	**73,696**	**58,551**	**59,502**	**63,104**	**-14.37**
Employment/Volunteerism		**11,236**	**11,805**	**12,567**	**12,198**	**8.56**
Full-time employees		2,450	2,357	2,318	2,196	-10.37
Part-time employees		5,607	5,640	5,838	5,809	3.60
Volunteers		3,179	3,808	4,411	4,193	31.9

***Note:** Totals may not add due to rounding*

Source: Statistics Canada, Survey of Heritage Institutions.

[1] *Includes only those not-for-profit parks and conservation areas that have an educational or interpretive component.*

preserves important ecological environments and provides the opportunity for Canadians to experience, appreciate and understand these environments. In 1993-94 over 16 million visits were made to the 36 parks and conservation areas under federal jurisdiction at that time (2 new parks were announced in October 1996). All unearned and capital revenues for national parks came from the federal government. In fact, revenues received from the federal government represented 83% of all revenues in 1993-94. However, the four years between 1990-91 and 1993-94 saw declines in both funding and staff in parks under federal jurisdiction (refer to Table 3). As federal operating revenues declined, there was an increased reliance on admissions as a source of revenue. Unlike the situation with parks overall, however, parks under federal jurisdiction experienced a decline in both full-time employees and in volunteers.

Heritage rivers

Canada's rivers have been vital components of our country's natural and human history. Today, there is relentless pressure on our rivers from industry, agriculture, and urbanization. To help identify, conserve and encourage responsible public use of important rivers, the Canadian Heritage Rivers System (CHRS) was set up as a cooperative program by the federal, provincial and territorial governments. The CHRS is overseen by a Board comprised of representatives appointed by each participating government. Parks Canada and the Department of Indian Affairs and Northern Development represent the federal government, while provincial/ territorial interests are represented by appointees from relevant ministries[4].

All agencies participating in the CHRS have agreed to adhere to a set of objectives and policies which are described in the documents, *The Canadian Heritage Rivers System: Objectives, Principles and Procedures*[5] and *The Canadian Heritage Rivers System Strategic Plan, 1996-2006*[6]. Briefly, the objectives are to give national recognition to the important rivers of Canada and to ensure appropriate future management. (Refer to the Map to identify designated rivers.) This will be done in such a way that the natural and human heritage which they represent is conserved and interpreted, and the opportunities they possess for recreation and heritage appreciation are realized by residents of, and visitors to, Canada.

[4] *In the case of British Columbia, a private citizen has been appointed to represent the province on the Board.*

[5] *Supply and Services Canada, Ottawa, 1984.*

[6] *Department of Canadian Heritage, 1996.*

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Table 3
Parks under Federal Jurisdiction, 1990-91 to 1993-94

		1990-91	1991-92	1992-93	1993-94	% change 1990-91 to 1993-94
						(%)
Number of Institutions		**35**	**35**	**36**	**36**	**2.86**
Attendance	**('000s)**	**16,538**	**16,088**	**16,754**	**16,651**	**0.68**
Revenues	**($'000)**	**188,206**	**173,562**	**179,680**	**181,987**	**- 3.30**
Operating Revenues	**($'000)**	**142,039**	**133,441**	**135,747**	**134,394**	**-5.38**
Unearned revenues	($'000)	111,766	104,694	104,341	103,265	-7.61
Earned revenues	($'000)	30,273	28,747	31,406	31,129	2.83
Admissions	($'000)	8,755	8,494	8,836	9,734	11.18
Other	($'000)	21,518	20,252	22,570	21,394	-0.58
Capital Revenues	**($'000)**	**46,167**	**40,121**	**43,933**	**47,593**	**3.09**
Expenditures	**($'000)**	**156,232**	**138,936**	**144,090**	**152,550**	**-2.36**
Operating Expenses	**($'000)**	**110,136**	**104,688**	**104,246**	**103,580**	**-5.95**
Wages	($'000)	80,017	75,070	75,664	74,769	-6.56
Other operating expenses	($'000)	30,119	29,618	28,582	28,811	-4.34
Capital Expenses	**($'000)**	**46,096**	**34,248**	**39,844**	**48,970**	**6.23**
Employment/Volunteerism		4,270	3,827	3,910	3,825	-10.42
Full-time employees		1,388	1,320	1,370	1,303	-6.12
Part-time employees		2,201	2,136	2,188	2,202	0.05
Volunteers		681	371	352	320	-53.01

Note: *Totals may not add due to rounding*
Source: Statistics Canada, Survey of Heritage Institutions

Radio Listening, Fall 1991 - Fall 1995

Lotfi Chahdi and John Gordon, Culture Statistics Program

Fall 1995 data[1] show that Canadians are continuing to listen to radio – for an average of three hours per day – despite all the other demands on their leisure time and competition from other forms of entertainment.

We can keep up with the news via television and newspapers. With audio tapes and CDs, we can listen to our favourite songs whenever we want. With the music channels, such as MuchMusic and Country Music Television, we can watch the video while we listen to the music. We can entertain ourselves with books and magazines. So why do we continue to listen to radio?

While the Statistics Canada Radio Listening Data Bank does not offer a direct answer to this question, it does provide answers to a number of other questions – on the role that radio plays in the daily lives of Canadians, the types of stations they listen to, the amount of time they spend listening to radio, and the size and nature of the listening audience.

Certain factors influence listening habits. Among these are advances in the electronics field which have made radio a portable medium (in the fall of 1995, 44% of all radio listening took place outside the home), and the fact that a person can carry on other activities while listening to radio (an early study showed that 95% of radio listening is considered a secondary activity[2]).

Canadians rely on radio to stay informed

What role does radio play in Canadians' daily lives? In particular, how much do they rely on it to stay informed? In the 1994 International Adult Literacy Survey, nearly 81% of Canadians aged 16 and over reported that either most or some of the time, they kept up on current events, government issues and public affairs. For this purpose, 55% of respondents reported that they had obtained a lot of information from radio, while another 28% reported obtaining a little. These figures speak for themselves: radio is an important source of information for Canadians.

Adult contemporary and rock stations most popular

Music formats continue to account for the largest audience share, at 70% of total listening in the fall of 1995, although this share had declined from the 74% reported in the fall of 1991. This is despite the 14% rise in the combined market share of non-music formats between 1991 and 1995.

Among music formats specifically, even though the adult contemporary and rock format[3] had lost 6% of its market share since 1991, it nevertheless maintained its dominance, capturing nearly half (48%) of the listening audience for music formats in the fall of 1995. The country music format captured the second largest portion (19%), having increased its market share by nearly 9% since 1991.

The popularity of different formats varies by province. The adult contemporary and rock format was popular nationally, accounting for just over one-third of total listening (including non-music formats) in the fall of 1995. Newfoundlanders, however, chose this format for a much larger share (53%) of their total listening. On the other hand, in Prince Edward Island and Saskatchewan country music format dominated, with 43% and 40% respectively of total listening, compared to a national average of 13%.

Although adult contemporary and rock was the format preferred by all age groups (except those over the age of 65), differences could be seen in listeners' second and third preferences. For adult men and women (aged 18 and over), these were country music and talk radio. For teens aged 12 to 17, the second and third choices were contemporary music (20%) and dance music (11%). Dance format exists only in Quebec and Ontario.

The popularity of adult contemporary and rock music can also be seen in the recording industry. In 1993-1994, 50% of the releases fell into the category pop/rock music. This category was followed by classical and related at 19%, and country and folk at 7%.

CBC[4] most popular with university graduates

The listening preferences of Canadians seem to be influenced by level of education and occupation. This is particularly evident for CBC and country-music formats.

The CBC share of listening varied from less than 5% of listeners with grade-school education or less, to 15% of those with some university education and 27% for university graduates. On the other hand, country-music is preferred by only 6% of those with university experience.

Similar variation in relation to occupation can be seen, with CBC achieving its highest share of listeners (26%) among senior mangers and professionals, while the country-music format attracted only 7% from this occupational group.

Radio most popular with Quebecers

Over the last five years, average hours per week of radio listening has only slightly changed from year to year for the country and for all provinces, except for British Columbia where average weekly listening dropped almost two and a half hours during this period to 18.6 hours per week. At the national level, the average listening was 21.0 hours per week in the fall of 1995.

1 *The Statistics Canada Radio Listening Data Bank is based on data acquired from BBM Bureau of Measurement.*
2 *Canadian Time Use Pilot Study – 1981.*
3 *Adult contemporary and rock is a combination of adult contemporary, gold, oldies and rock station formats.*
4 *Canadian Broadcasting Corporation stations are non-commercial and provide a unique variety of information and programming and are combined in a separate format.*

Interest in information, 1994

Persons keeping up on current events, government issues and public affairs	Percentage
Most of the time	59
Sometimes	22
Only occasionally	12
Almost never	7

Source: International Adult Literacy Survey, Statistics Canada, 1994.

Sources of information, 1994

	Radio (%)	Television (%)	Newspapers (%)	Magazines (%)
A lot	55	65	43	15
A little	28	24	35	33
Very little	9	6	13	29
None	7	4	8	22

Source: International Adult Literacy Survey, Statistics Canada, 1994.

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Table 1

Average hours per week of radio listening, by province, and age/sex groups - Fall 1991-1995

	Canada	Nfld.	P.E.I.	N.S.	N.B.	Que	Ont.	Man.	Sask.	Alta.	B.C.
Fall 1991											
Men 18 +	21.7	18.6	22.8	21.1	20.5	22.7	21.6	20.3	21.7	21.8	21.2
Women 18 +	23.1	21.5	22.2	22.1	21.7	23.9	23.2	23.5	22.9	21.9	22.5
Teens 12 - 17	12.4	11.6	15.8	13.7	13.7	11.9	13.3	11.6	12.1	11.4	11.2
Total population	21.5	19.0	21.8	20.9	20.3	22.2	21.6	20.9	21.2	20.8	20.9
Fall 1992											
Men 18 +	21.5	18.6	23.9	20.1	19.4	22.6	21.5	20.9	22.9	22.6	19.8
Women 18 +	22.7	21.5	23.4	23.6	21.4	24.5	22.3	21.7	23.4	22.1	20.8
Teens 12 - 17	11.6	10.2	15.7	11.6	11.2	11.3	12.4	10.6	11.4	11.7	10.3
Total population	21.1	18.9	22.8	20.9	19.5	22.4	21.0	20.3	21.9	21.3	19.4
Fall 1993											
Men 18 +	22.1	20.6	23.7	21.3	18.4	23.5	22.2	21.1	22.4	21.9	20.5
Women 18 +	23.1	22.0	25.1	23.5	20.8	24.9	23.5	22.1	22.4	21.3	20.6
Teens 12 - 17	11.9	10.0	14.3	11.3	10.6	11.6	12.6	12.3	11.6	11.8	11.0
Total population	21.6	19.9	23.1	21.3	18.7	22.9	21.9	20.7	21.2	20.6	19.7
Fall 1994											
Men 18 +	22.1	20.3	20.4	21.9	19.5	23.4	22.1	21.0	23.3	22.6	20.3
Women 18 +	22.6	22.0	24.7	23.3	20.5	24.1	22.4	21.9	22.5	22.3	20.7
Teens 12 - 17	11.0	11.6	15.5	10.6	10.9	10.8	11.6	9.6	10.5	11.3	9.7
Total population	21.2	20.1	21.9	21.5	19.1	22.5	21.2	20.3	21.5	21.2	19.5
Fall 1995											
Men 18 +	21.8	20.1	20.7	22.0	19.8	22.7	22.1	20.8	22.4	22.7	19.5
Women 18 +	22.2	21.6	23.4	22.1	21.5	23.7	22.2	22.4	20.9	22.0	19.7
Teens 12 - 17	11.0	12.1	13.1	9.8	10.5	11.1	11.6	10.7	9.4	12.0	8.9
Total population	21.0	19.9	21.2	20.9	19.6	22.0	21.2	20.5	20.2	21.2	18.6

Quebecers spent 22.0 hours a week listening to radio, the highest listening level of all provinces. This position has been maintained since 1986 when provincial breakdowns were first available at Statistics Canada. Other provinces with listening levels higher than the 21.0 hour national average were Prince Edward Island, Ontario, and Alberta, each with 21.2 hours per week recorded in the fall of 1995.

Over the last five years, the lowest Fall radio-listening has been in British Columbia, New Brunswick, and Newfoundland. In the fall of 1995, British Columbians recorded less radio listening than the population of any other province.

Teens spent half as much time listening to radio as adults

Adult men (age 18+) on average listened to 21.8 hours per week, slightly below the average reported by adult females at 22.2 hours. Listening by teens aged 12 to 17 years is slightly higher than adults during the evenings, but it is much lower during the day, especially during the 10 a.m. to 3 p.m. period when most are in school. It is therefore not surprising that teens' average weekly listening time (11.0 hours per week) was only half the figure for adults.

Popularity of FM stations growing rapidly

Even though the number of hours of radio listening exhibits no obvious upward or downward trend, the listening audience of FM stations has been steadily growing.

In 1995, there were 817[5] originating stations[6] in Canada. FM stations predominated with 467 originating stations, or 57% of the total. This compares to 47% in 1991. Average weekly tuning showed an even more pronounced growth in the popularity of FM stations, accounting for almost two-thirds of reported listeners (62%) in the fall of 1995. Five years ago AM and FM stations shared equal popularity. The popularity of FM can be seen in all age groups, for both sexes.

Conclusion

In summary, despite competition from television, newspapers, tapes and CDs, books and magazines, radio continues to play a major role in the lives of Canadians, whether they want to obtain information, listen to music or simply entertain themselves.

[5] *Although this number includes 6 AM and 20 FM originating stations in Yukon and Northwest Territories, the data on listening in these areas are not available.*

[6] *An originating station is one which broadcasts material from a specific location and provides at least 50% of its own programming.*

Note to Readers:

These data are based on a survey of 81,470 Canadians aged 12 and over representing a population of about 25.4 million. They were asked to fill out a diary type of questionnaire for seven specific days within an eight-week period from September to October 1995. While the return rate, at 50.1%, is modest by the standards of Statistics Canada, it is in line with Canadian and international broadcasting industry practice for audience measurement. Appropriate care in interpretation is recommended.

The radio project of the Culture Statistics Program is a joint venture involving the Marketing Analysis Division of the Canadian Radio-Television and Telecommunications Commission (CRTC), and the broadcasting policy branch of Canadian Heritage and the Culture Subdivision of Statistics Canada.

The Statistics Canada radio listening data bank integrates files from different sources. The underlying listening data are acquired from BBM Bureau of Measurement and include the demographic characteristics of the respondents to the survey. The CRTC provides the information on the formats of specific stations.

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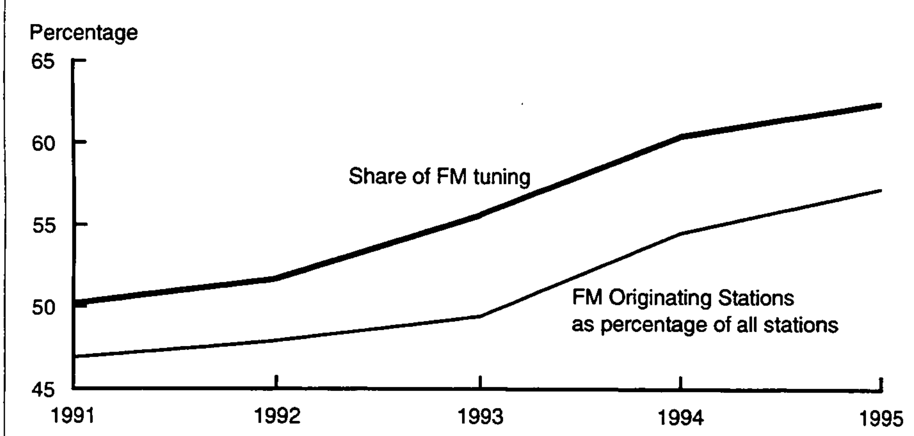
Table 2

Percentage share of radio listening by format: Fall 1991-1995

	1991	1992	1993	1994	1995	% change 1991 to 1995
			percentage			
Music formats	**73.7**	**73.7**	**71.6**	**71.3**	**70.1**	**-4.9**
Adult contemporary/gold/oldies/rock	35.9	36.5	30.5	34.4	33.7	-6.1
Middle-of-the-road	7.2	7.3	7.1	6.9	6.9	-4.2
Country	12.3	13.3	14.3	13.7	13.4	8.9
Album-oriented-rock	10.6	10.0	10.3	5.6	6.1	-42.5
Contemporary	4.4	4.2	3.0	4.9	4.8	9.1
Easy listening	3.3	2.4	2.5	1.1	1.0	-69.7
Dance	..	..	3.9	4.7	4.2	..
Other formats	**26.3**	**26.3**	**28.4**	**28.7**	**29.9**	**13.7**
Canadian Broadcasting Corporation	10.0	9.3	9.5	9.2	9.7	-3.0
Talk	10.4	10.4	8.6	12.1	12.0	15.4
Sports	..	..	3.2	0.5	0.5	..
U.S. stations	3.6	3.6	3.1	3.2	3.1	-13.9
Other	2.2	3.2	3.4	3.7	4.6	109.1
Total	**100**	**100**	**100**	**100**	**100**	

.. *Figures not available.*

Average weekly tuning to FM stations has grown steadily since the Fall of 1991



Attendance at Movie Theatres and Drive-ins Continues to Grow

Norman Verma, Project Manager, Theatres

Attendance at movie theatres in Canada increased in 1994-95, a trend started 3 years ago[1]. Despite the continuing growth of the home entertainment industry, movie theatre admissions grew for the third year in a row to reach 81.1 million in 1994-95, up about 4%[2] from the previous year. Movie theatres also reported a 7% increase in profits to $62.6 million in 1994-95. Attendance at drive-in theatres also increased, to 2.7 million, up 9% over 1993-94. Despite this growth, however, profits at drive-ins fell 9%.

After decades of decline, movie attendance is showing steady growth

Movie attendance, including at drive-ins, peaked in 1952-53 at 256 million admissions, at a time before television sets became standard home equipment. Attendance had dropped to 98 million by 1963-64 and held reasonably steady at this level over the next two decades.

Over the 1980-81 to 1990-91 period, with the proliferation of videocassette recorders and other forms of home entertainment equipment, attendance at movie theatres, including drive-ins dropped 21% to 78.9 million. In 1991-92, attendance fell to the lowest level in 40 years, to reach 71.6 million, a drop of 9% from the previous year.

Now, however, the picture is looking different. The latest survey results show that movie-going continues to be on the rebound in Canada. Attendance at movie theatres increased in each of the last three years to reach 81.1 million in 1994-95. This figure represented a slight percentage growth over the level of admissions in 1990-91, indicating a slow climb back up from the drop in 1991-92. Most provinces and territories reported a growth in movie theatre attendance between 1991-92 and 1994-95, ranging from a low of 2% in Manitoba to a high of 25% in British Columbia.

Drive-in theatres also staged a comeback as attendance reached 2.7 million in 1994-95, up 9% from the year before, the second consecutive annual increase.

Several factors may account for renewed interest in attending movies. Larger, multi-screen theatres with comfortable seats, digital sound and video games

[1] *Our survey data really do not allow us to say whether more people are now going to the movies or whether about the same number of people are attending, but more often.*

[2] *Survey processes were changed in 1994-95 and some additional respondents were added to the survey frame. Therefore, for purposes of comparison accuracy, the percentage comparisons (for any years between 1990-91 and 1994-95) are based only on those theatres which responded in the years of comparison. It should be noted that the numbers reported in the text for 1994-95 are the actual numbers provided by all the respondents for the 1994-95 survey.*

Continued p. 8

have made theatres an attractive place of entertainment for teenagers and families. Children of the baby-boom generation who are now in their teens and 20s are the most enthusiastic movie-goers. Further, average admission prices declined about 11% in the early 1990s because of discount specials such as "cheap Tuesdays", children's matinees, repertory theatre subscriptions and other evening specials. Prices held steady in 1994-95 at movie theatres and actually dropped 2% at drive-ins.

In 1994-95, the most avid movie goers were residents of Alberta and British Columbia, topping well the national average of nearly three movie outings a year (refer to Figure 1). Newfoundland had the lowest average attendance, at about one movie outing a person during the year.

Chain-operated theatres attract a considerably larger number of patrons than independently operated theatres. In 1994-95, while 59% of the total number of theatres, including drive-ins, were chain theatres, they accounted for 85% of the total attendance. On a per theatre basis, chain-operated theatres had an average attendance of 181,840, about four times that of independently operated theatres (47,260).

Attendance at chain-operated theatres is concentrated in metropolitan areas. In 1994-95 nearly two-thirds of the total attendance reported by chain-operated theatres was in metropolitan areas, although only about one half of the total number of theatres operated by chains were located there. This is because the large chain theatres located in metropolitan areas have advantages associated with multiple screens, and they generally exhibit the most commercially attractive first-run films.

Profits rise for movie theatres and decline for drive-ins

Movie theatres had a good year financially, reporting a 7% increase in profits to $62.6 million in 1994-95. Independent movie theatre profits lagged well behind those of chain movie theatres. In 1994-95, chain-operated movie theatres had average profits of $165,050, nearly ten times greater than those made by independently operated theatres ($17,860). Profits of the chain movie theatres were up nearly 8%, compared to about 6% for independent movie houses.

The profit picture for drive-ins, despite increased attendance, was not as bright, again with independents suffering more than the chains. Drive-in theatres reported a profit of $1.9 million in 1994-95, down 9% from the previous year. Chain-operated drive-in theatres recorded a 7% profit drop in 1994-95 to $42,000 for each drive-in, while the profits of independents fell 36% to $9,680 for each drive-in.

Restructuring continues

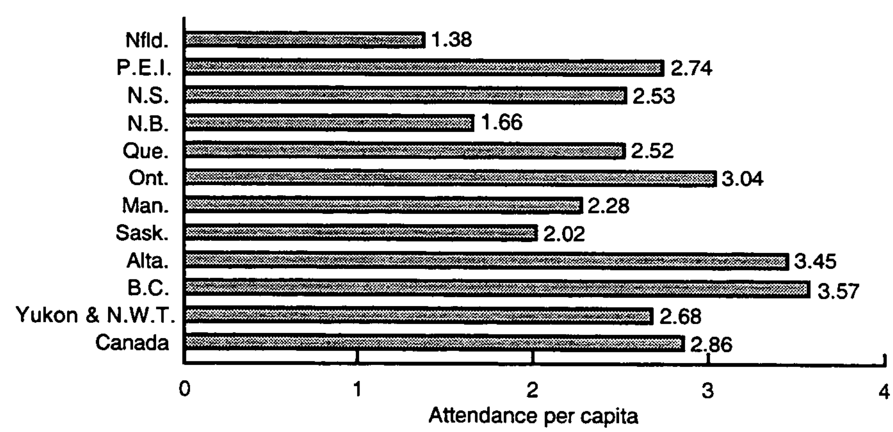
Continued competition from the home entertainment industry has spurred motion picture theatre companies to rationalize and restructure their operations. They have continued to close unprofitable theatres and to turn many theatres in urban centres into multi-screen houses.

Between 1990-91 and 1994-95, the number of movie theatres fell about 11% to 582. However, the number of screens grew nearly 3% to 1,682 over the same period. In 1994-95, nearly four-fifths of the total number of screens were reported by chain-operated movie theatres and these chain movie theatres were almost entirely responsible for the growth in the number of screens between 1990-91 and 1994-95. Drive-in theatres had an average of 1.6 screens per drive-in theatre in 1994-95, almost unchanged from the number reported in 1990-91.

Movie theatre companies are also attempting to remain competitive by reducing their employment costs. In 1994-95, movie theatres had just 2.0 full-time employees per theatre, following an annual average drop of about 11% in staff since 1990-91. Theatres reduced their part-time employment at a much slower pace (an annual average rate of 0.5%), thus maintaining the prominence of this type of work in the industry, at 13.3 part-time persons per theatre in 1994-95.

Figure 1

Per capita attendance at movie theatres and drive-ins lowest in Newfoundland, highest in British Columbia, 1994-95



Paid admissions at motion picture theatres in 1994-95 slightly ahead of 1990-91 numbers (based on a standard set of 501 movie theatres and 69 drive-in theatres)

	1990-91	1991-92	1992-93	1993-94	1994-95
movie theatres (paid admissions '000)	69,701	63,291	64,224	67,511	69,883
drive-in theatres (paid admissions '000)	2,263	2,074	1,880	2,130	2,322
All theatres ('000)	**71,964**	**65,365**	**66,104**	**69,641**	**72,205**

Continued p. 9

Drive-in theatres, on the other hand, reported an annual average increase of 2% in the number of full-time employees per drive-in, to 2.2 in 1994-95 from 1990-91. They also recorded a corresponding increase of 2.3% in the number of part-time employees per drive-in, to 10.2 in 1994-95.

Home entertainment sector continues to expand

Although the effect of the home entertainment industry on movie theatres seems to have stabilized, theatres still face competition from this sector. In 1990, for example, 66% of households had a video cassette recorder and 71% had cable-TV service. Of these cable subscribers, 28% also purchased additional discretionary services, some of which show commercial-free movies. By 1994, 79% of households had a VCR, 74% had cable-TV and 69% of cable subscribers had additional services. □

Did you know. . . ? Highlights of the 1994-95 Data on Government Expenditures on Culture

Federal, provincial/territorial, and municipal governments spent a combined total of $5.84 billion[1] on culture in 1994-95, up 0.5% from the previous year. When inflation is taken into account, however, total spending on culture by all three levels of government was down 0.3% from the year before, the fifth consecutive inflation-adjusted drop.

The federal government pumped $2.88 billion into the cultural sector (accounting for nearly half of all government spending on culture), up 1.6% from the preceding year. This increase halted three straight years of decline, during which federal cultural expenditures had dropped at an annual average rate of 0.7%. The growth in federal spending in 1994-95 was largely the result of increased spending on broadcasting[2]. While federal spending on operations and capital projects went up 2%, federal grants, contributions and other transfers to artists and cultural organizations fell 3%.

Federal spending on culture rose in seven provinces and territories. It grew most in the Northwest Territories (+12%) and in Prince Edward Island (+8%). In those areas showing declines, the largest occurred in the Yukon (-12%) and in Newfoundland (-9%).

On a per capita basis, federal cultural spending ranged from a high of $690 in the Northwest Territories to a low of $40 in British Columbia, with a national average of $98.

Per capita government expenditures on culture 1994-95

	Federal	Provincial/territorial	Municipal
		$	
Canada	**98**	**62**	**49**
Newfoundland	89	48	22
Prince Edward Island	140	90	10
Nova Scotia	87	58	31
New Brunswick	90	41	26
Quebec	116	83	37
Ontario	108	50	54
Manitoba	68	78	41
Saskatchewan	49	56	53
Alberta	59	57	41
British Columbia	40	63	80
Yukon	443	289	11
Northwest Territories	690	202	20

Provincial and territorial governments spent a total of $1.82 billion on culture, down about 5% from the previous year. This was only the second decline in a decade, after a drop of 2% in 1993-94. Spending declines in 1994-95 that were greater than the national decline (-5%) were reported by British Columbia (-16%), followed by New Brunswick and Prince Edward Island (-8% each) and Nova Scotia (-6%). Growth in spending was recorded in Manitoba (12%), the Northwest Territories (4%) and the Yukon (2%).

On a per capita basis, provincial/territorial spending exceeded the national average of $62 in four provinces and the two territories. Spending was below the national average in the remaining provinces, with the lowest rate ($41) occurring in New Brunswick.

Municipal governments spent a total of $1.43 billion on culture, an increase of 0.9% from the preceding year. Spending on libraries continued to dominate municipal cultural outlays, accounting for about three-quarters of the total municipal cultural budget.

Municipal cultural spending declined in Prince Edward Island, Nova Scotia, Quebec, and the two territories; spending rose in all other provinces.

[1] *Total expenditures are net of inter-governmental transfers.*

[2] *Most of this increase was attributable to downsizing costs that included staff severance packages.*

PUBLICATIONS

87-211 Canada's Culture, Heritage and Identity:
A Statistical Perspective (107 pg) $30.00

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