



CULTURE

Quarterly Bulletin from the Culture Statistics Program

Catalogue no. 87-004-XPB

Winter 1997

JAN 15 1998

Vol 9, No. 4

Small Canadian Book Publishers - How are they Different?

David Coish, Manager, Survey of Book Publishing Industry

Canada's book publishing industry as a whole experienced a year of solid growth in 1994-95, with record levels of revenue and profits. Yet small publishers' (revenues less than \$250,000) collectively lost \$678,000. Losses as a percent of revenue for this group were -5%, with over a third of small publishers not breaking even.

Given the role that small publishers play in publishing and promoting Canadian authors and works of national significance (92% of small publisher's titles in print are Canadian-authored), their contribution to Canadian literary content is disproportionate to their financial size. They can offer publishing opportunities to new and upcoming authors who command smaller advances or royalty payouts, or those operating in less profitable market niches such as poetry. By these means, our lesser known writers are heard. Small publishers, however, do not have the economies of scale of their larger competitors. They print smaller runs, but this results in a higher unit cost per book and the need to sell more copies to reach a break-even point.

Financial differences

The 89 small publishers who responded to the Survey of Book Publishers and Exclusive Agents for 1994-95 are all Canadian-owned, in contrast to 92% of larger publishers. In 1994-95, small publishers earned a slightly higher proportion of sales revenue (excluding other foreign sales²) from exports than did all larger publishers (12% compared to 10%). Yet, when only Canadian-controlled larger publishers are examined, the proportion is 17%. Despite fewer human and capital resources, small publishers appear to be taking advantage of growing international markets, but not to the same extent as larger Canadian-controlled firms.

Grants comprised 18% of total revenue for small publishers compared to just 2% for larger ones. If small publishers had not received grants their collective loss would have been much larger than \$678,000 in 1994-95. Cuts in grants, whether for operating costs, marketing programs or professional development, pose a huge challenge for those small firms operating on the financial edge.

Table 1

Financial health of Canadian book publishers varies by size of firm, 1994-95

	Small Publishers	Larger Publishers
Number of publishers	89	237
Total revenues (\$'000)	12,571	1,582,161
Before-tax profit/loss (\$'000)	-678	127,178
As a % of total revenue (%)	-5	8
% of firms with a loss (%)	36	24

Smaller publishers had little revenue from exclusive agency³ operations (5% of their total revenue in 1994-95 compared to 27% for larger firms), but collectively did have sizeable revenues from activities other than book publishing or exclusive agency (24% of their total compared to 16% for larger firms). Common sources of "other revenue" include book retailing, periodical publication, and interest income. However, this other revenue was earned by few small publishers, as 78% had no sources of income other than book publishing.

¹ Only publishers with book publishing revenues of \$50,000 or more were surveyed in 1994-95. For 1996-97 this revenue restriction will be dropped. (No data will be collected for the 1995-96 fiscal year.)

² "Other foreign sales" are of books printed and sold outside of Canada. That is, they never cross the border.

³ Firms engaged in exclusive agency activities do no publishing of their own, but distribute and sell works published by another firm, by acting as its sole representative. The exclusive agent is generally responsible for the marketing expenses of those titles sold on an exclusive basis.

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Canada

What do they publish?

The majority of titles published, reprinted and in print by small publishers in 1994-95 were by Canadian authors. As noted above, 92% of their titles in print were Canadian-authored. This contrasts with 79% for larger publishers, or 83% for larger Canadian-owned publishers. The difference here may reflect a variety of factors such as limited capital to sign up foreign authors, a commitment to Canadian literature, or the greater likelihood of the author being Canadian where a publisher produces books with a regional focus.

Over three quarters of new titles produced by small publishers in 1994-95 were tradebooks (mass market paperbacks, trade paperbacks and hardcovers⁴) compared to just over one half for larger publishers. Two in three titles reprinted by small publishers were tradebooks compared to 38% for larger publishers. This dominance of tradebook production among small publishers is also reflected in titles in print, as three quarters were tradebooks versus one half for larger publishers. Not surprisingly, 68% of domestic sales revenue earned by small publishers in 1994-95 was for tradebooks, versus 27% for larger publishers.

Small publishers are much more likely to produce a literary work, whether fiction or non-fiction. Within the grouping of tradebooks are also found such niche markets as poetry books, regional history, biography, and children's books (not used as textbooks). They are much less likely to produce textbooks, scholarly, reference, or professional books for specialized technical audiences. (Refer to Table 2.)

Among tradebooks published, small firms were much more likely to publish trade paperbacks (88%) than larger firms (42%), as well as to reprint this format (97% versus 68%). For small publishers this makes economic sense as trade softcovers cost less to produce than trade hardcovers, yet greater revenues can be realized compared to mass market paperbacks because of the higher prices charged for the physically larger trade paperbacks.

Although both small and large firms were overwhelmingly likely to use the print format in 1994-95, other formats were also used to a lesser extent. Audio (cassette books) and electronic (software, CD-ROM, etc.) formats constituted 0.8% of titles published for small publishers but 3.2% for larger firms. For books reprinted by small publishers, 2.8% were in non-print

Table 2

Trade books dominate small publishers' activities, 1994-95

	Small publishers		Larger publishers	
Titles published				
Textbooks	66	(10%)	2,390	(23%)
Tradebooks	496	(78%)	5,551	(53%)
Other*	72	(11%)	2,521	(24%)
Total**	634	(100%)	10,462	(100%)
Titles reprinted				
Textbooks	43	(20%)	3,981	(55%)
Tradebooks	145	(66%)	2,747	(38%)
Other	30	(14%)	531	(7%)
Total	218	(100%)	7,259	(100%)
Titles in print				
Textbooks	706	(11%)	24,256	(34%)
Tradebooks	4,783	(76%)	37,766	(53%)
Other	782	(13%)	9,477	(13%)
Total	6,271	(100%)	71,499	(100%)
Domestic revenue (\$'000)				
Textbooks	1,145	(16%)	255,016	(39%)
Tradebooks	4,954	(68%)	175,929	(27%)
Other	1,150	(16%)	217,727	(34%)
Total	7,249	(100%)	648,673	(100%)

* "Other" includes scholarly, general reference, and professional and technical books.

** Totals may not add to 100% due to rounding.

format compared to 4.3% for larger firms. For both small and larger publishers, most of these reprints were audio cassettes.

To produce a book in non-print format often requires sizeable capital investment. This may not be available to many small publishers, particularly given that over one in three did not earn a profit in 1994-95. Thus a sizeable shift to non-print formats in an increasingly technology-driven industry could become a problem in the future for small publishers.

In what language do they publish?

Although a lower proportion of small publishers are French⁵ (34% compared to 37% for larger publishers), a greater share of small publisher revenue (domestic and export) was from the sale of French books than for their larger competitors (32% versus 28%). This supports the contention that small publishers present outlets for regional and minority voices.

Staffing

Small publishers have proportionately more part-time staff, working proprietors and volunteers than their larger competitors. In fact, full-time employees constituted just 39% of small firm personnel (including working owners) in 1994-95 compared to 86% for larger firms. A high percentage of part-time employees in small firms (33% versus 13% for larger firms) may be no surprise given the small scale of operations. The large number of volunteer workers (20% of personnel compared to 1.3% for larger firms) underlies the grassroots support that

sustains many small publishers. Lastly, 8% of small publishing staff were working owners in 1994-95, compared to just 0.1% for larger concerns. Overall, the 89 small publishers counted just 251 staff, including volunteers and working owners.

Who do they sell to?

A breakdown of the markets for small and large publishers reveals some fundamental differences. Over one in three 1994-95 sales dollars were earned by small publishers because of sales to a wholesaler (exclusive agent, distributor, wholesaler, jobber), compared to only 12% for larger firms. Many smaller firms lack human and financial capital required to market their products independently, or access to secure financing. Therefore, they are more likely to use intermediaries to distribute their product.

Smaller firms are also less likely to sell their books to the institutional sector (governments, libraries, educational institutions, etc.), given that they print

⁴ Tradebooks are titles published for consumption by the public at large. They can be further broken down by physical type of book:

- Mass-market paperbacks: usually a pocketbook size publication designed to be sold at a low cost.
- Trade paperbacks: softcover publications in a variety of sizes, but larger than mass-market paperbacks.
- Trade hardcovers: publications bound in heavier stock covers or with more luxury (leather, cases, etc.).

⁵ The language of the publisher is determined by examining net books sales. For example, if greater than 50% of revenue was earned from the sale of French books, then the publisher is considered French. English and other language publishers are grouped together.

proportionately fewer scholarly, reference and professional/technical books.

Where are they located?

Each province/region had comparable shares of small and larger publishers, except for British Columbia which had proportionally more small publishers in 1994-95, and Ontario which had proportionately fewer. Thus small publishers are not so much found in less populous provinces or regions, but rather are found in niche markets within each province or region.

Summary

Through profit margins, reliance on grants, types of book published, medium of publication, markets and staffing, small publishers distinguish themselves from the larger players in the field. The vast majority of their published works are by Canadian authors, offering valuable contributions to our domestic publishing industry. Yet by taking part in the rapid growth in Canadian cultural exports, they are accessing larger, expanding markets, in a bid to remain competitive. □

Cultural Trade and Investment Project

Roland Hébert, Analyst, Culture Statistics Program

It is generally recognised that international trade and investment can be an important means of economic growth and expansion for a given industry. In particular, international commerce may have a vitalising effect on cultural industries and activities. Consequently, industry analysts, market participants and policy makers require data to help identify and track the structure and dynamics of these cultural transactions. In order to satisfy these data needs, Statistics Canada initiated the Cultural Trade and Investment (CTI) Project. The objective of this project is to provide consistent and comparable data on international transactions regarding Canada's cultural industries and activities.

The project is presently mid-way through its three year developmental period. So far, a conceptual framework for cultural statistics has been developed and the initial steps in data compilation and aggregation have been made. The final year of development will be used to address data weaknesses and gaps by refining the concepts and the data collection systems. A new set of time series data is expected to be available

Chart 1

Small publishers rely on wholesale revenue, less on institutional sales, 1994-95

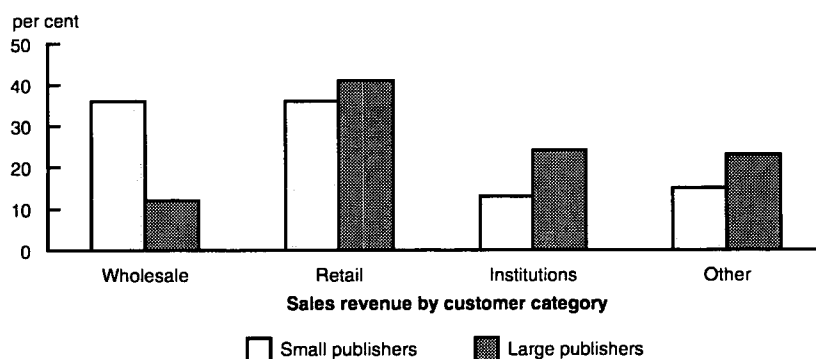
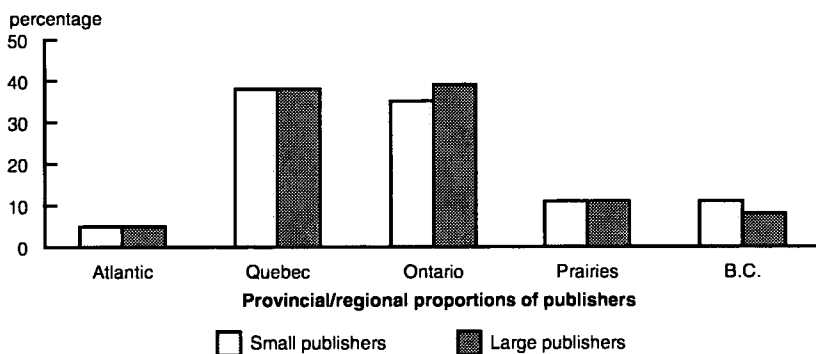


Chart 2

Proportion of small and large publishers quite evenly balanced by province/region, 1994-95



sometime in the summer of 1998 through the CTI Project report.

The data used in the CTI Project come from many sources within Statistics Canada and cover four main areas: cultural commodity trade, international investment, cultural services trade, and cultural intellectual property trade. A description of these four areas is presented below, followed by a discussion of the data used in the project.

Cultural Commodity Trade

Cultural commodities are the main physical outputs of the industries and activities identified through the framework for cultural statistics (see *Focus on Culture*, Vol 9 N°3 for a description of the framework). Video cassettes, books, paintings and newspapers are but a few examples of these types of goods. Besides cultural commodities, the CTI Project also measures the trade in cultural equipment, which is used either in the creation of cultural commodities or in the consumption of those commodities. For instance, recording

Technical papers that are related to the CTI Project:

Canadian Framework for Cultural Statistics and Analytical Studies;
Technical Paper on International Cultural Commodity Trade;
Technical Paper on International Investment Into and From Canada's Industries and Activities;
Technical Paper on International Trade in Intellectual Property and Cultural Services.

equipment is used in the creation of a music CD (the cultural commodity), and stereo equipment is used to listen to (i.e. consume) the CD.

A special report on cultural commodity trade should be available by February 1998.

International Investment

International investment in an industry can be an important source of capital for economic growth. For this reason, the CTI Project will produce data on investment in Canada's cultural industries

and activities by other countries of the world and by Canada's cultural industries abroad. In general, there are three types of international investments: *direct* investment, *portfolio* investment (stocks and bonds), and *other* investment (loans, deposits, etc.). The type of investment of interest to the CTI Project is direct investment.

Direct international investment represents the investment which allows an investor to have a significant voice in the management of a firm operating outside his or her own economy. An example of this type of investment includes funds to finance capital formation such as a manufacturing plant, production equipment and so forth. Data on direct investment are available for most cultural industries.

In addition to the direct investment data described above, film financing data are available for the film production companies. The film industry is fairly unique because film productions are sometimes financed by investors who do not own the finished film or even the company that produces the film. In this type of arrangement, the investor is usually paid a proportion of royalties and/or a lump sum percentage return on investment when the film earns a profit. These film production financing data are collected through a film survey conducted by the Culture Statistics Program.

Cultural Services Trade

Besides trade in physical commodities, the CTI Project also measures international trade in cultural services. Basically, a service provider transforms or improves an entity that is owned by someone. A haircut or the repairs done to a car by a mechanic are examples of services. Cultural services, as identified through the CTI Project, are services fairly unique to cultural companies and to activities that fall within the cultural framework. An example of a cultural service is an editor's contribution to a manuscript. Since the editor doesn't own the manuscript, the modifications are considered to be services. Other examples of cultural services are printing services, film post-production services such as special effects, the services provided by talent agents and so on.

Intellectual Property Trade

There are two distinct components to products that can be owned: the *physical* property and the *intellectual* property. Physical property is a commodity as described earlier, and

intellectual property is the intangible or "intellectual" nature of a product.

The concept of intellectual property can be better understood with an example. A book can be purchased by a consumer who then reads it, but copyright laws prohibit the reader from plagiarising ideas or passages from the book. In this case, the commodity (the book) is bought and consumed, but the intellectual property embodied in the passages and ideas is not bought by the consumer. The owner of intellectual property therefore controls the use of the intellectual content of a good. It is worth noting that the intellectual property is not necessarily owned by the individual who created the product; like a commodity, intellectual property can be sold or rented. The rights to a book, song, performance, etc. can all be purchased.

There are basically two types of financial rewards for intellectual property measured by the CTI Project: royalty payments and licensing fees. A royalty payment is a percentage of the sale of a commodity which goes to the owner of the intellectual property and a licensing fee is a charge levied on an individual who leases the right to an intellectual property.

Data Issues

Efforts to define the concepts of the CTI Project and to address data gaps have resulted in significant improvements to the data for international commodity trade, direct investment and film production financing; these data are now considered to be consistent and reliable. On the other hand, data on services and intellectual property still pose problems relating to the sources of the data and survey respondent lists.

The data on services and intellectual property come from several surveys within Statistics Canada. However, the way that questions are currently asked in some of the relevant surveys does not necessarily correspond to the needs of the CTI Project. The scope of the questions is sometimes too wide or too narrow for CTI uses, resulting in data noise, incomplete coverage or data gaps. Future re-designs of some of the surveys may be able to address these data needs. As well, the implementation of PIPES (Project to Improve Provincial Economic Statistics) and NAICS (North American Industrial Classification System) over the next few years may help to improve data coverage and quality (see *Focus on Culture*, Vol. 9 No 3).

The second data issue of concern is the use of survey respondent lists and the lack of harmony in the questions of different surveys. Since the data originate from surveys which are conducted by different divisions of Statistics Canada and for different purposes, the result is that these various surveys use different respondent lists and different questions. There is therefore a danger of having overlapping and inconsistent data. To correct these deficiencies, a full understanding of the surveys and the respondents' activities is required. As a result, much time has been invested in the research and analysis of these surveys to co-ordinate them, and additional future improvements are still expected.

For more information about the CTI Project or to obtain technical papers contact Max Sudol, Manager of CTI Project, Culture Statistics Program. □

Towards Comprehensive Sport Statistics

Lucie Ogrodnik, Senior Research Analyst, Culture Statistics Program

The United Nations Educational, Scientific and Cultural Organization (UNESCO) includes Sports and Games in its framework for cultural statistics. Statistics Canada and Sport Canada started work on a new national sport statistics program in the 1996-97 fiscal year.

Sport and physical activity are important components of Canadian society. We feel national pride when our athletes perform well competitively, and some sports like hockey are even seen as part of our national identity. Sport and physical activity contribute to the health and well-being of the nation. Sport promotes the values and ethics of fair play, leadership, co-operation, volunteerism, equality among genders and groups, and the pursuit of excellence.

Statistics Canada collects sport-related data through a number of ongoing national surveys. Data are available on the manufacturing of sporting goods, retail and wholesale sales, employment in sport, family expenditure on sport, participation in sport, government expenditure on sport, and the import/export of sport commodities. Unfortunately, the amount of sport data

currently available is insufficient to provide a comprehensive profile of the nature, benefits and value of sport to Canadians. Furthermore, the data that are available are difficult to compare due to conceptual and definitional differences. That is, in attempting to assess the impact of the sport sector in Canada, we are faced with the recurring problem of sport data being intertwined with data on physical activity, recreation and even leisure. The challenge ahead is to implement a strategy for achieving consistency in defining 'sport' across surveys, as well as isolating sport statistics from other related data.

Until means are available to monitor, measure and evaluate all facets of the sport industry across the nation, the ability to formulate sound strategic policies and undertake effective planning is limited. And without comprehensive guidelines co-ordinating these collection efforts, evaluating information needs and targeting data gaps, the resulting information remains piecemeal and inadequate.

Recognizing the utility of developing comprehensive sport statistics, Sport Canada has entered into two contracts with Statistics Canada. The first, during fiscal year 1996-97 involved three main components. To begin with, we analysed the sector overall, looking at the concepts and definitions of sport currently in use. Available data were then assessed and integrated where possible. Data and other information gaps were thus identified. Lastly, a multi-year plan including a proposal for future work and anticipated costs was prepared.

A second contract has been signed for the current fiscal year. A draft report entitled *The Health and Vitality of the Sport Sector in Canada* was submitted to Sport Canada in May of this year and work is well underway with a view to also achieving the following:

- 1) establishing a clear and agreed upon statistical framework for the collection and presentation of consistent national sport statistics;
- 2) co-ordinating and positioning sport statistics amongst Statistics Canada's broader data collection surveys and activities;
- 3) furthering the integration and analysis of existing data on sport; and
- 4) developing an effective communication and marketing strategy.

Some data highlights

Government support for sport and physical activity occurs in many ways. Total government expenditures on sport and recreation amounted to just over \$4 billion in 1993-94 (see Table). In that year the federal government spent \$483 million on sport of which \$76 million was provided by Sport Canada (Department of Canadian Heritage). Provincial and territorial funding for sport and recreation totalled \$512 million. Municipal spending on recreation reached over \$3 billion in 1993-94, far surpassing the other levels of government at 76% of all government expenditures on sport that year. Local governments carry primary responsibility for such facilities as ice skating arenas, swimming pools, football and soccer fields, gymnasiums, recreational grounds and community centres.

Government expenditures on sport down, still led by municipalities

	1990-91	1991-92	1992-93	1993-94	% change 1990-91 to 1993-94
\$ '000,000					
Total expenditures	4,244.3	4,443.4	4,306.3	4,141.3	-2.4
Federal	475.5	484.6	505.5	482.6	1.5
Sport Canada	68.8	68.3	72.2	75.8	10.2
Other	406.7	416.3	433.3	406.8	-
Provincial ¹	683.2	788.5	621.7	512.2	-25.0
Municipal	3,085.6	3,170.3	3,179.1	3,146.5	2.0

¹ Provincial expenditures include recreation (less parks) and other recreation (not included elsewhere).
Source: Sport Canada, Department of Canadian Heritage
Public Institutions Division, Statistics Canada

A multi-year strategy is proposed which targets the need for ongoing developmental work to begin addressing the data gaps, as well as integration and analysis initiatives to ensure consistency amongst the various surveys collecting sport data. Moreover, improving current data holdings through consultation, networking and co-ordination with the relevant sectors both within and outside Statistics Canada is also a priority.

Involvement of the wider sport community, including federal and provincial sport organizations is essential to ensuring that endorsement of the work occurs early and that the resulting statistical infrastructure has relevance and integrity. Consultations continue with the provinces and federal departments with an interest in sport statistics.

Sport Supplement to the General Social Survey, 1998

The latest venture into addressing some of the data gaps in the area of sport statistics is the repetition of the Sport Supplement to the General Social Survey (GSS) in 1998. The GSS is a telephone sample survey of about 10,000 households in Canada. It has been six years (1992) since the GSS last collected detailed data on Canadians' participation in sport activities at the national, regional and

provincial levels. It is felt that the upcoming cycle of the GSS is a cost-efficient way of meeting some of the identified sport information requirements.

The success of the GSS Sport Supplement requires the active involvement of the sport community through setting content and making financial contributions. Statistics Canada is not funded to undertake more than the core portion of the GSS survey; therefore, we must rely on interested clients to sponsor the sport supplement. At this time, Sport Canada and four of the provinces will be contributing financially to this endeavour.

Other Activities

Continuing the momentum built to this point is crucial to the building of comprehensive sport statistics. This may be achieved in a number of ways:

- by encouraging and attaining wide acceptance of the harmonized approach to the study of sport in Canada;
- by monitoring the implementation of definitional guidelines across Statistics Canada, thus increasing the credibility and utility of a national sport statistics program in Canada;

- by identifying data gaps through the statistical framework thus leading to recommendations on the development and collection of additional sport data;
- by marketing the availability of national sport data;
- by creating an automated database for the centralized dissemination and analysis of national sport statistics;
- by fostering research partnerships which lead to cost savings and efficiencies, and a reduction in duplication and respondent burden, while promoting compatibility and improving consistency in data interpretation by different client groups; and
- by keeping abreast of international developments in the area of sport statistics.

This discussion represents some of the information that will be available in the final report for Sport Canada due at the end of this fiscal year. For further information on the sport statistical project you may contact Lucie Ogrodnik, Culture Statistics Program. □

Partnerships Make Expensive Research Affordable

Craig Grimes, Senior Research Analyst, Culture Statistics Program

The deficit-cutting policies of the federal and provincial governments in recent years have increased the competition for scarce public funds among programs and initiatives dependent upon these funds for income. This competition has heightened the demand by the affected sectors for better, more detailed information on the economic and social benefits of their programs for evaluation purposes and to make advocacy campaigns more effective. The Catch-22 is that just when expensive statistical research is needed to sharpen funding decisions, the monies to purchase this research are diminishing.

Building Partnerships and Products

The Culture Statistics Program (CSP) in 1996 began to address this need for the culture sector by initiating a research partnership program to combine the

More data highlights

Data show that the total outlay of consumer dollars on sport and recreation continues to grow. The Family Expenditure Survey reported a 20% increase in annual spending on sport and athletic equipment, sportswear, use of recreational facilities and live sports spectacles, from an average of \$520 dollars per family in 1986 to \$623 dollars in 1992. Total annual spending on sport-related clothing and activities increased by 33%, from the \$5.4 billion reported in 1986 to \$7.2 billion in 1992. Consumers are allocating a greater share of their personal expenditures to sport and recreational activities; however, this may be attributed, in part, to inflated prices rather than to increased demand for these goods and services.

The 1992 General Social Survey reported that of 21.3 million Canadians aged 15 and over, almost 10 million or 45% indicated that they regularly participated in sports. More men (52%) participated regularly than women (38%), and young Canadians participated in larger proportions than any other age group. Seventy-seven percent of persons aged 15-18 participated regularly in sport, while Canadians aged 55 and over had the lowest participation rates with approximately one in four participating on a regular basis. It was also found that participation rates increased with education and family income. Participation was twice as high for Canadians with a family income over \$80,000 compared with those having a family income less than \$20,000. Fifty-eight per cent of those with at least a university degree participated regularly in sport, compared with 36% of those having less than a secondary school diploma.

research budgets of many clients.¹ Various funding partnerships formed across Canada have included representatives from federal, provincial and municipal levels of government, government agencies, cultural industries, and cultural organizations. Through the purchasing power of the partnership, each member of the group has been able to gain access to a comprehensive set of culture statistics, to which it might have been impossible or too costly for individual members to gain independent access. Where possible, provincial partnerships were organized to establish a common and meaningful point of reference for group members and to make it possible to develop standard CSP tables. The introduction of standard tables reduced the development cost for members and as a result, the purchasing power of the partnership was increased. This gave the consortium the ability to purchase even more data and improve the depth and quality of the analysis, thereby increasing their understanding of the factors affecting the health and vitality of the culture sector in their province.

Clients were provided with statistics on the cultural, social, economic and financial factors that have an impact on Canadian culture. A sample table of contents is included, to illustrate the scope of analysis that we have been carrying out.

Specific Project Objectives

To efficiently produce such a wide variety of statistics, geography-specific databases were created that were

linked to the multi-dimensional nature of cultural activities. This work made it possible for CSP analysts to develop a better understanding of the total volume of cultural goods and services being produced, the cultural labour market, and productivity and competitiveness characteristics. All are essential to appreciating the structure, evolution, and dynamics of the culture sector. A database also provides analysts with improved data access and streamlines the creation of relevant statistical outputs. Such outputs, tailored to the needs of clients, may help policy makers arrive at practical decisions on such issues as how best to allocate resources during times of restraint or inflation. Users are able to analyse the economic impact of the culture sector and sub-sectors in their province and compare these values to those of the entire culture sector in Canada. Research findings also provide practical assistance to management in planning future budget needs and allocations. Finally, statistics and the underlying statistical framework also serve as the documentation base for future research projects.

Specifically the project plans and deliverables were as follows:

¹ Statistics Canada does not allow membership in a consortium by people who are interested in having access to data in order to generate commercial output (analytical products or services) which they would then sell to others. Statistics Canada considers such individuals as independent purchasers who would be subject to different conditions than members of the consortium.

- Provide consistent methodology, concepts and definitions necessary for the better understanding of the factors influencing the health and vitality of the culture sector in the geographic areas being studied.
- Identify potential new research partnerships with a view to improving current information holdings and highlighting areas for data integration and data development.
- Provide a means of networking, and strengthening existing partnerships with the provinces.
- Provide a means of enlisting the provinces in the validation of CSP survey population frames.
- Provide the client with a comprehensive data product, which covers all cultural industries and activities, with data on creators, consumers, producers, inputs, outputs, activities of culture support organizations (including government), and factors affecting supply and demand.
- Provide a means of assessing the utility and quality of CSP products and services - in effect a means of program evaluation. Partnerships with data users should result in an ongoing dialogue centred on data quality and the relevance of data products and services. Such feedback is necessary if the development of client-oriented products and services is to be successful.
- Identification of current and future research needs, and the introduction of options to improve the base level of data collected.

A wider range of research initiatives

Not only were client cost savings realized, but activities associated with this initiative were also seen as a way for the CSP to increase its client base and encourage consistent interpretation of cultural statistics. The data prepared by the CSP not only addressed the questions underlying the initial client data requests, but in addition, the CSP has been able to explore issues or topics of current importance for which critical analysis was seen to be useful and relevant. Examples are

Sample Table of Contents

Government Spending on Culture
 Economic Impact of the Arts and Culture Sector
 Direct Impact
 Indirect Impact
 Government Income Derived from Cultural Activities
 Comparisons with Other Sectors of the Economy
 Employment in the Culture Sector
 Employment Comparison with other Sectors
 Growth in Volunteer Activity in the Culture Sector
 Culture Labour Force: Education, Training and Technology
 Participation in and Spending on Cultural Activities
 Consumer Expenditures on Recreation and Culture
 Participation in Cultural Activities
 Factors Influencing Participation in Cultural Activities and Events
 Arts, Heritage and Library Institutions
 Profile of Not-For-Profit Performing Arts Companies
 Visual Arts and Crafts
 Festivals and Other Cultural Events
 Cultural Industries
 The Film Industry
 The Broadcasting Industry
 The Music Industry
 The Book Publishing Industry
 The Periodical Publishing Industry
 Export Performance of Selected Cultural Industries
 Culture Tourism
 Sport and Government
 Consumer Expenditures on Recreation & Sport
 Economic Impact of Sport
 Employment in the Sport Sector
 Defining the Recreation Sector

- Is the cultural infrastructure (i.e., companies, institutions, creative and performing artists) in a specific region being eroded by hard economic times, changes in consumer behaviour, diminishing grants, pressures of import competition or other factors?
- What has been the impact of changes in business labour strategies? Pricing policies? Productivity?
- What has been the impact of government programs and changes in them?
- How has the export market enhanced the vitality of the culture infrastructure?

Summary

The initiative to partner clients in funding consortiums has met with success across the country, resulting in the creation of large economies of scale that have enabled clients to purchase reports with comprehensive analysis of the culture sector, covering many perspectives and multiple data sources.

Projects are in various stages of completion for Newfoundland, Prince Edward Island, Nova Scotia, New Brunswick, Ontario, Saskatchewan, and British Columbia. This is the first time the Culture Statistics Program has attempted to prepare comprehensive data products for funding partnerships and we are expecting the feedback from this initiative to result in even better data products as we progress.

For the remainder of this fiscal year the Research and Communication Section of the Culture Statistics Program will continue to produce these data products, with each new report building on the lessons learned from previous editions. The plan is to develop a report for each province (including those not yet partners within this initiative) and to periodically update each report through the establishment of long term funding partnerships. The hope is that existing partners will assist in the continual development of these products by commenting on their strengths and weaknesses, and that new partners will enter these consortiums and be given cost effective access to the wide variety of statistics available from the Culture Statistics Program.

If you have any comments or questions about the data products mentioned here or if you would like to receive more

information on the future of this initiative, please contact Craig Grimes, Culture Statistics Program. □

JUST RELEASED

The 1997 Edition of the Culture Statistics Program's compendium publication, ***Canada's Culture, Heritage and Identity: A Statistical Perspective*** is now available (catalogue 87-211 (\$31)). Over 140 bilingual pages cover data from the Program as well as from other sources, brought together to paint a comprehensive picture of culture and the arts in Canada. The changing cultural landscape is described through trends in public and private funding of culture, profiles of such cultural sectors as heritage, printed matter and literature, music and performing arts, visual arts, film and video, radio and television and sports and games, and through a description of Canada's cultural diversity. The enclosed brochure includes an order coupon with all necessary information for you to obtain your copy of this overview publication, filled with tables, charts and text.

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:

Mary Cromie
Editor, *Focus on Culture*
Culture Statistics Program
R.H. Coats Building, 17 D
Statistics Canada
Ottawa, ON K1A 0T6

(613) 951-6864 (telephone) or
(613) 951-9040 (fax) or crommar@statcan.ca



For information on special data tabulations or the content of specific surveys, please contact any of the following:

Paul McPhie	Assistant Director, Culture	951-9038	mcphpau@statcan.ca
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Culture Surveys

Chief	John Gordon	951-1565	gordonj@statcan.ca
Book Publishing	David Coish	951-3028	coisdav@statcan.ca
Periodical Publishing	David Coish	951-3028	coisdav@statcan.ca
Film and Video	Michael Pedersen	951-3305	pedemic@statcan.ca
Radio and Television	Lotfi Chahdi	951-3136	chahlot@statcan.ca
Motion Picture Theatres	Norman Verma	951-6863	vermnor@statcan.ca
Sound Recording	Erika Dugas	951-1568	dugaeri@statcan.ca
Performing Arts	Marie Lavallée-Farah	951-1571	lavamar@statcan.ca
Heritage Institutions	Fidel Ifedi	951-1569	ifedfid@statcan.ca
Government Expenditures on Culture	Norman Verma	951-6863	vermnor@statcan.ca
Cultural Labour Force	Lotfi Chahdi	951-3136	chahlot@statcan.ca

Research and Communications

Chief	Michel Durand	951-1566	duramic@statcan.ca
Consumption of Cultural Goods and Services	Mary Cromie	951-6864	crommar@statcan.ca
Economic Impact	Craig Grimes	951-1332	gricra@statcan.ca
Cultural Trade and Investment	Maxine Sudol	951-9173	sudomax@statcan.ca
Sport	Lucie Ogrodnik	951-1563	ogroluc@statcan.ca
Labour Market Analysis	Pina La Novara	951-1573	lanopin@statcan.ca
<i>Canada's Culture, Heritage and Identity: A Statistical Perspective</i>	Michel Durand - information only (not to order)	951-1566	duramic@statcan.ca

Focus on Culture (Catalogue 87-004) ISSN 0843-7548 is published four times a year under the authority of the Minister responsible for Statistics Canada, © Minister of Industry, 1997.

Editor: Mary Cromie, (613) 951-6864

Subscription Rates: Canada: \$9 per issue, \$27 annually. Outside Canada: US\$9 per issue, US\$27 annually. Toll-free order service in Canada: **1-800-267-6677.**

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