FOCUS ON CULTURE

Quarterly Bulletin from the Culture Statistics Program

Catalogue no. 87-004-XIE Vol. 12, No. 2

A Profile of the Largest Independent Film, Video and Audio-visual Producers in Canada, 1988-89 to 1997-98

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The last ten years have seen the emergence of a large and vibrant independent film, television and video production industry in Canada. Canadian producers of television have grown in importance both within the Canadian viewing market and abroad. Exports of television productions have soared. Although still a much smaller industry than television, theatrical film production has also grown. Two other parts of the industry, TV commercials and corporate and educational videos are highly specialized and tend to function in their own separate sphere having little interaction with the theatrical and TV portions of the industry. The production of TV commercials and videos has grown modestly.

This article will compare the characteristics of the ten largest producers – as measured by production revenues - with all the others, over a ten year period starting in the survey year 1988-89. It will examine the relative importance of these two groups and significant trends. It will seek to explain what has driven the emergence of a leading group of producers and how they have changed the industry.

Prominence of the top ten

In terms of production revenue the largest producers occupy an importance that is vastly disproportionate to their number (see Table 1). In 1997-98, the top ten independent producers earned $647 million in production revenue, versus $477.4 million for the other 691 producers that reported to the Statistics Canada Film, Video and Audio-Visual Production Survey.

Furthermore, as Chart 1 shows, there has been a marked increase in the dominance of the largest producers over the last ten years. From 1988-89 to 1991-92, the top ten were responsible for about 40% of production revenue. After that, the largest producers' relative importance increased sharply, to the point where they earned 58% of industry production revenues in 1997-98.

Over the decade ending in 1997-98, the top ten producers were responsible for approximately three-quarters of the total growth in production revenue from $532.9 million to $1.1 billion. The contribution of the biggest producers to the industry has been especially important since 1992-93 when the industry as a whole – but the top ten especially - started to grow more rapidly (see Chart 1). Although the other production companies have continued to show some growth, their annualized growth rate of 4% has fallen well short of the 12% growth rate of the top ten.

Even within the top ten, a few companies are much larger than the rest. In addition, the top five earned more than four-fifths of the group's production revenue and almost one-half of the industry total.

Although the dominance of large players continues, there has been significant turnover among the specific companies making up the top ten. Of those companies that were in the top ten in 1988-89, only two remained there in 1997-98. Six other companies were in the survey in 1988-89 but were not in the top ten. While some top ten companies have seen their revenues decline and have fallen out of the top ten, other companies have grown and entered the top ten.

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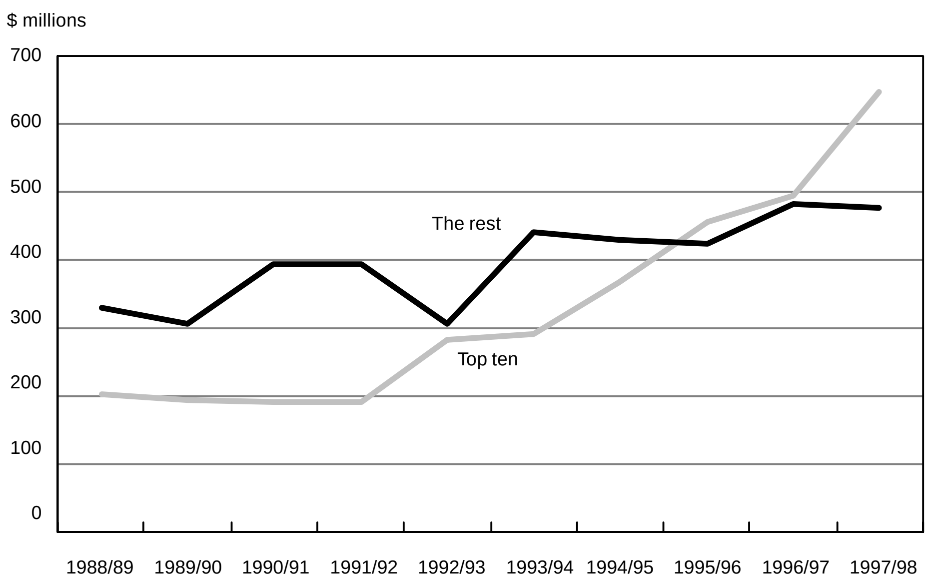
Table 1
Selected Statistics, film, video and audio-visual production, 1988-89 to 1997-98

	Top ten producers		% Change	Other producers		% Change
	1988-89	1997-98	1988-89 to 1997-98	1988-89	1997-98	1988-89 to 1997-98
Production revenue ($million)	202.6	647.0	219.3	330.2	477.4	44.6
Television	106.1	324.4	205.7	100.9	180.4	78.8
Film	18.3	36.4	98.9	9.4	17.2	83.0
TV commercials	61.0	57.8	-5.2	82.1	116.1	41.4
Other production activities[1]	17.3	228.4	1,220.2	137.8	163.7	18.8
Total revenue ($million)	213.6	838.5	292.6	415.8	589.2	41.7
Exports ($million)	54.4	370.9	581.8	26.1	52.6	101.5
Television exports	37.2	226.5	508.9	18.0	27.4	52.2
Other	17.2	144.4	739.5	8.1	25.2	211.1
Total expenses ($million)	196.7	781	297.1	410.1	545.3	33.0
Salaries, wages, benefits and freelancer fees	65.5	123.6	88.7	139.9	185.9	32.9
Other	131.2	657.4	401.1	270.2	359.4	33.0
Full-time employment (number)	412	1 544	274.8	2 456	2461	0.2

1 Other includes educational, government and corporate videos as well as service production work in television and film.

Chart 1. Production revenues, top ten versus the rest, 1988-89 to 1997-98



An overwhelming majority of producers in the survey are Canadian-controlled. In every year of the last ten years, less than one percent of the smaller companies were foreign-controlled. In every survey year there was never more than one top ten company that was foreign-controlled.

Not the result of mergers

The tremendous growth of the top ten independent producers in Canada between 1988-89 and 1997-98 has not been the result of mergers of smaller companies into large units. While there have been a few cases where large producers acquired smaller producers, the growth of the biggest companies is primarily due to the expansion of their activities.[1]

Driving force of television

What activities account for the surge in the industry in general, and in the top ten in particular? The data show that it is television production, especially for the export market, that has driven growth in the industry.

As Chart 2 illustrates, the largest producers have increased their share of the television production market. In the last ten years they have been primarily responsible for the growth of independent television production in Canada. While the television revenues of the smaller producers have reached $180.4 million in 1997-98, those of the top ten tripled to $324.4 million.

The $298 million growth in TV production over the last ten years – three-quarters of which is accounted for by the top ten – accounts for more than one-half of the production revenue growth.[2] Nine out of the top ten companies specialized in television production, meaning that the majority of their production revenues came from television production.

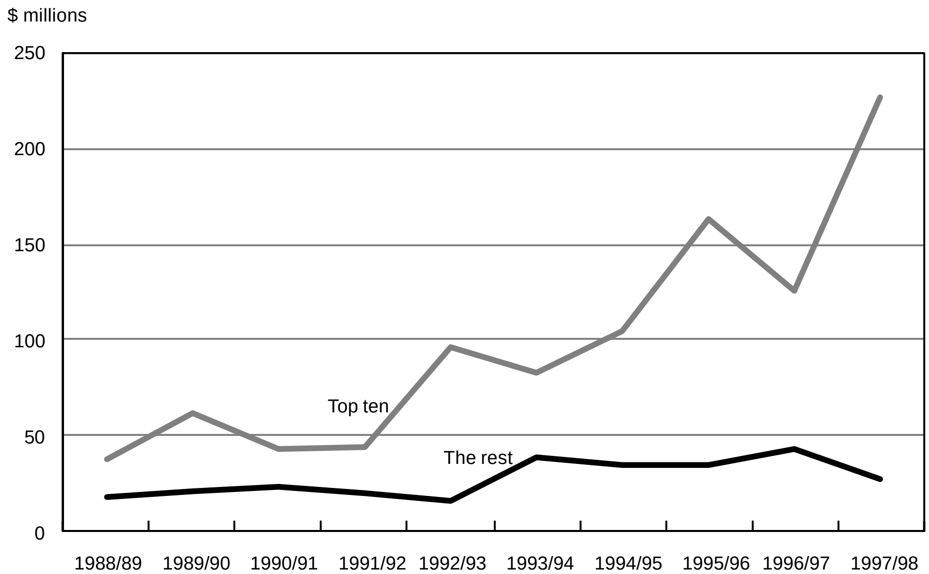
And exports

Although the domestic market has expanded over the last decade, the largest increases in production revenues have come in the export market. Fifty-eight percent of the

1 Note that no mergers subsequent to the 1997-98 survey year are relevant to this analysis.

2 Assuming that none of the unspecified "Other" category of production revenue represents television.

Chart 2. Television Production Exports, 1988-89 to 1997-98



growth in production revenues has come from sales abroad. In 1988-89 exports accounted for only 15% of production revenues, or $80.5 million. By 1997-98, they had shot up to 38% of production revenues, or $423.5 million. It is the sale of television programs that lie behind this growth in exports. Almost 60% of the export growth is the result of sales of television programs.

Export growth has been spectacular among the top ten. While exports among the rest of producers doubled from 1988-89 to 1997-98, those of the top ten increased nearly seven-fold. Exports of television productions increased at least six-fold among top ten companies, while among the rest it increased by at least 50%.

This crucial improvement in the ability to sell TV programming into foreign markets has been accompanied by a significant growth in the budgets of television productions. Average expenditures on comedy and drama TV productions grew from $5.2 million per series in 1988/89 to $9.2 million per series in 1997-98, an increase of 77%. During this time, the consumer price index grew only by 27%. While no doubt the increase in production expenses has been largely funded by export sales, improved production values may also have been necessary in order to generate presales in foreign markets.

Recent data suggest that at least half of all exports went to the United States. Top producers were slightly more reliant on this market than were the rest of the producers.

Top ten producers earn 99% of their foreign revenues from royalties for their productions, while smaller producers earn substantial shares of foreign revenues from the provision of services (12%) and the sale of advertising (12%).

Meanwhile, the sale of theatrical features followed its own trend. Revenues earned from theatrical features doubled from 1988-89 to 1997-98, but with considerable fluctuation in the middle years. Top ten producers began and ended the decade with about two-thirds of the theatrical sales.

Smaller producers' specialties

There are two production fields in which smaller companies still dominate – advertising and corporate videos. While sales of television commercials increased from $143.1 million in 1988-89 to $173.9 million in 1997-98, the share earned by top ten companies fell from 43% to 33%. The corporate video sales market, which was over 90% controlled by smaller producers, showed no consistent trend over the ten years, averaging $68 million per year.

Smaller producers still largest employers

Smaller producers are still the source of most jobs in the industry, although the share attributed to top ten producers has grown in the last decade. Full-time employment by smaller producers has remained stable at approximately 2,400 employees, while that of top ten producers has tripled to more than 1,500. Meanwhile, employee compensation has grown by half to $309 million in 1997-98, with the share paid out by large producers rising from one-third to 40%.

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Sport Participation in Canada, 1998

Lucie Ogrodnik, Research Analyst, Culture Statistics Program

Canadians exhibited a dramatic shift in their sport participation rate from 1992 to 1998. According to the latest information released from Statistics Canada's General Social Survey (GSS), fewer Canadians aged 15 years and older reported participating in sport in 1998 than six years earlier (down almost 11 percentage points). In 1998, one-third of the adult population[1] or 8.3 million Canadians participated in sport on a regular basis, down from the 45% (or 9.6 million) who reported participating in 1992. This drop in sport participation was widespread, cutting across all age groups, provinces, education levels, income brackets and both sexes.

This downward trend does not mean that Canadians are not engaging in any physical activity. It is recognized that many Canadians engage in various physical activities such as attending physical fitness classes, jogging, gardening, power walking, etc. In fact, it has recently been reported that rates of physical activity have been on the rise. Statistics Canada's *National Population Health Survey* reports that most of us are active, with over 9 out of 10 Canadians walking for exercise, swimming, exercising at home, jogging, playing hockey or engaging in some

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[1] Adult population refers to Canadians 15 years of age and older.

other form of physical activity. Canadians are indeed physically active, but whether or not we are active in sport *per se*[2] is the real focus of this article.

Various social and economic factors offer possible reasons for this decrease in sport participation including an aging population, economic pressures, limited leisure time and the wide range of other leisure activities vying for our attention. The increasing cost of sport and recreational equipment and user fees is certainly one factor to consider. According to the Consumer Price Index (CPI), the price of sport and recreation equipment and services rose 11% between 1992 and 1998 while total prices for all goods and services rose 8.9% over the same time period.

It has also been suggested that ongoing technological advancements may lead to increasingly sedentary lifestyles in Canada. As more of us continue to purchase computers and spend more of our leisure time surfing the Internet, fewer hours will be available for the pursuit of sport and other physical activity. A result may be that physical inactivity will become a major public health issue likely to have an impact on our already over-burdened health care system.

More men than women participate in sport

A substantial difference in sport participation rates continues to exist between the sexes. The rate of males participating in sport continues to be higher than that of females. In 1998 43% of adult males reported playing sports on a regular basis compared with 26% of adult females. The difference between male and female participation rates seems to be widening. In 1992 there was a 14 percentage point spread between the sexes but by 1998 the gap had widened to 17 percentage points.

Contributing to this widening gap is the decrease in the female sport participation rate over this six-year period. While the proportion of both males and females playing sports declined between 1992 and 1998, the female participation rate shows the largest decrease. In 1992 over one-third of adult females (38%) indicated being involved in sport. By 1998 this figure had dropped 12 percentage points to just over one-quarter (26%). In comparison the male sport participation rate dropped by 9 percentage points over the same time period.

Youth most active in sport

Recent trends reveal that sport participation decreases rather dramatically as we age. The younger the individual, the more likely he or she is to participate in sport. The youngest age group surveyed, 15 to 18 year olds reported the highest sport participation rate with almost seven out of ten (68%) playing sports at least once a week in 1998 - twice the national rate of 34%. Participation dropped to about 5 in 10 for persons aged 19 to 24, to 4 in 10 for the 25 to 34 age group and to just under 2 in 10 for persons aged 55 and over.

As we all know, Canada's population is aging. The baby boom has had a significant impact on the age distribution and structure of the general population and will continue to make its effects felt as the number of seniors living in Canada increases notably over the next 20 years. Consequently, one would anticipate that this demographic change will likely have a negative impact on sport participation rates.

Quebec, Alberta and BC boast high sport participation rates

Regional and provincial disparities in rates of sport participation observed in 1992 persisted into 1998. Participation generally increases as we move from east to west. Residents of Prince Edward Island and Newfoundland reported the lowest rates of sport participation followed by Manitoba, New Brunswick and Ontario. Alberta and British Columbia residents reported participation rates above the national average, at 37% and 36% respectively. Quebec led the way with the highest rate of sport participation, with nearly 40% of residents playing sports on a regular basis. As with all provinces, however, this represented a drop in sport participation from six years earlier.

Sport participation increases with education and income

The data also indicate that the higher the level of education attained, the higher the sport participation rate. In 1998 nearly one-half (46%) of those holding a university degree participated in sport compared with less than one-third (29%) of persons with some secondary schooling or less. A number of factors could help explain this relationship. It could be said, for instance, that the more educated a person is, the more aware he/she is of the health benefits of being active in sport. On the other hand, age may be the stronger influencing factor since young people tend to participate in sport at a higher rate, and in general, have attained higher levels of education than their older counterparts.

A similar trend holds true for household income and sport participation. The higher the household income, the higher the sport participation rate. In 1998, half of respondents (51%) in households earning incomes of $80,000 or more participated in sport compared to one-quarter of respondents in households earning less than $20,000. Admittedly, financial resources are required to purchase the necessary sport equipment and to pay user fees. On the other hand, sports such as soccer, swimming and basketball can all be enjoyed with minimal cost. Thus, economics may not be the only factor at play. It is likely that the effects of education and income are inter-related. It is difficult to determine which variable has the largest impact on sport participation rates without undertaking more complex statistical analyses.

Students most active in sport

The GSS revealed differences in participation rates among various types of employment activity. Students (either with or without employment) reported the highest rate of involvement in sport (64%), almost twice the national average. This observation is not surprising given that it is young people between the ages of 15 and 24 who are most active in sport and the most likely to still be attending school.

As for the remaining employment categories, the data reveal that 40% of full-time workers reported playing sports on a regular basis. This rate dropped to 33% involvement in sport by persons working part-time (less than 30 hours per week) and 23% involvement by persons not in the labour force.

Sports we enjoy - golf ranks as the most popular sport in 1998

In 1998, golf replaced hockey as the most popular sport in Canada. Over 1.8 million Canadians (or 7.4% of the adult population) reported playing golf

[2] *Guidelines for determining whether a physical activity fell within the scope of "sport" were determined by Sport Canada, the funding partner for this research.*

on a regular basis[3] compared to 1.3 million (5.9%) in 1992. This interest in golf lies mainly with adult males, who made up three-quarters of all golfers. Their numbers increased from 912,000 in 1992 to 1.3 million six years later. As for female golfers, the numbers are substantially lower, yet still impressive, with almost 500,000 women playing golf in 1998. Almost 60% of golfers reported playing once or twice a week, and another 20% reported playing three or more times a week during the golfing season.

Hockey was the second most popular sport in 1998. One and a half million adult Canadians (6.2% of the adult population) reported playing hockey, showing little change from the 1.4 million (6.4%) reported in 1992. As one might expect, 96% of those playing hockey were male. Baseball (5.5%) and swimming (4.6%) ranked third and fourth.

As our data on hockey show, men and women do not share equal interest in the same sports. Swimming, golf, baseball and volleyball are the sports of choice for women 15 years and older, while men prefer to play hockey, golf, baseball or basketball.

More Canadians coaching and refereeing amateur sport

While the data show that fewer adult Canadians are actively engaged in sport, a greater proportion of us are participating, albeit indirectly, as coaches and referees.

Canada's sport infrastructure relies to a great extent on the input of thousands of volunteers. Countless men and women of all ages dedicate their time and energy to supporting amateur sport. The number of Canadians coaching amateur sport doubled from an estimated 840,000 (4%) Canadians in 1992 to 1.7 million (7%) in 1998. This increase took place across all age groups with the exception of older Canadians aged 55 plus.

Similarly, the number of Canadians involved as referees, officials and umpires increased from an estimated 550,000 in 1992 to almost 940,000 in 1998. This represents nearly 3% of the adult population in 1992 and 4% in 1998. A shift may be taking place away from directly engaging in sport towards more indirect involvement. This may be a reflection of a number of factors including less leisure time for the personal pursuit of sport, parental responsibilities and aging.

Benefits of sport

Researchers have long recognized that participation in sport makes a positive contribution not only to personal fitness and health but has wide-reaching benefits including the development of social skills, self-esteem, leadership skills and helping with stress management.

In an effort to assess the perceived benefits of sport among adult Canadians, a new question was added to the 1998 cycle of the GSS Sport Supplement. Specifically, Canadians were asked to rank the degree to which sport is important in providing them with the following benefits: physical health and fitness, family activities, new friends/acquaintances and relaxation. Active[4] Canadians reported health and fitness (71%) and relaxation (69%) as the two most important benefits to them

[3] *Note that respondents could report participating in more than one sport.*
[4] *Active Canadians refers to the total population 15 years and older reporting participation in sport on a regular basis over the 12 months prior to being surveyed.*

Table 1

Profile of adult Canadians[1] who regularly participated in sport, 1998

	Total	
	000s	% adult population participating in sport
Age group	**8,309**	**34**
15-18	1,121	68
19-24	1,235	51
25-34	1,781	39
35-54	2,937	31
55 and over	1,234	20
Level of education		
Some secondary or less	1,794	29
Some college/trade/high school diploma	2,049	34
Diploma/some University	2,522	41
University degree	1,900	46
Family income		
Less than $20,000	581	25
$20,000 to $29,999	479	26
$30,000 to $49,999	1,465	34
$50,000 to $79,999	1,833	41
$80,000 or more	1,602	51
Province of residence		
Newfoundland	119	27
Prince Edward Island	27	25
Nova Scotia	248	33
New Brunswick	194	32
Quebec	2,288	38
Ontario	2,921	32
Manitoba	265	30
Saskatchewan	267	34
Alberta	833	37
British Columbia	1,147	36
Labour force participation		
Full time	4,544	40
Part time	539	33
Student with/without employment	1,515	64
Not in labour force	1,562	23

[1] *Adult Canadians refers to persons 15 years of age and older.*
The participation rate is calculated using the total adult Canadian population for each designated category.
Estimates are rounded to the nearest thousand.
Totals may not add due to rounding.
Source: Statistics Canada, General Social Survey, 1998

of sport. The remaining benefits which included a sense of achievement (57%), family activity (43%) and making new friends/acquaintances (41%) were reported as somewhat less important.

Reasons for not participating

Why aren't more Canadians participating in sport? The time crunch being experienced by most of us is likely having an effect on sport participation. Given our over-extended, busy schedules it is not surprising that 'lack of time' was the reason most frequently reported for non-participation. Almost one-third of inactive Canadians reported having no time for sport. 'Lack of interest' ranked as the second reason indicated by over one-quarter (26%) of non-participants, and reasons of 'health/injury' and 'age' tied for third at 13% each. The unavailability of sport facilities and programs ranked last among the reasons given.

Possible factors influencing sport participation rates

Given the pace of technological advancements, the aging of our population, limited free time, competition from a growing array of leisure activities, variable economic conditions and changing consumer tastes, it is a wonder that any leisure activity, including sport, is able to sustain its share of participants. Each of these factors play their part in influencing how we spend our discretionary time, effort and dollar. According to David Foot's latest edition of <u>Boom, Bust and Echo 2000</u>,

"A nation of young people is a society of hockey and tennis players. A nation of older people is a society of gardeners and walkers. These gentler, more individualistic pursuits (may) replace the more vigorous activities... Participation in sports as well as attendance at sports events will become less popular."

The challenge ahead lies in being able to understand and anticipate some of these changes, and then to target those sports and services which the emerging conditions will demand.

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Culture Jobs Increasing[1]: Update on the Culture Labour Force using the Labour Force Survey[2]

Jacqueline Luffman, Research and Communications

The economy was strong in 1999 and while consumers were interested in big-ticket items such as automobiles in the first quarter of the year their attention turned to services later in the year. As a result, there were job gains in the entire labour force last year and culture jobs were no exception. There were 14.5 million Canadians working in 1999 and of these, 3.1% or 447,400, were culture workers (refer to Table 1).

The appetite for Canadian-made products spurred activity in factories across the country. Job growth in manufacturing industries led the way in overall employment, especially in the computer and electronic parts sector. Culture workers also rode the high employment wave and saw substantial increases in employment compared to 1998 (+10%) and even more since the beginning of the decade (+23.4%). As a result of the healthy economy, the overall unemployment rate fell to 7.6% from 8.3% the previous year (refer to Table 2). The unemployment rate for culture workers, at 3.8%, was much lower than the national average.

Employment increased in nearly every culture discipline. The largest gains were in architecture-related jobs (+23%) and printing-related jobs (+15.6%). Fine and commercial arts, performing arts and audio-visual jobs experienced healthy employment growth as well. In fact, performing arts and audio-visual jobs increased by roughly 10,000 (+12.6%) over 1998. The exceptions to this growth were heritage and library jobs. During the nineties, librarians and library technicians recorded substantial declines in both full-time and part-time employment. Between 1998 and 1999 alone, they recorded a 10% drop in employment. Some decreases in part-time employment for museum and gallery-related occupations were also reported.

Full-time culture jobs increased

What types of culture jobs were created in 1999? Both full-time and part-time culture jobs experienced much growth. Labour market researchers and policy analysts monitor full-time jobs because their growth is usually interpreted as a sign of a healthy economy. In general terms, full-time jobs tend to be more secure, have higher pay and greater benefits. The number of people working full-time in the total labour force increased 4.4% between 1998 and 1999. The magnitude of this increase was even greater for full-time culture jobs. Over the last year alone, the number of full-time culture jobs surged by 11%. Interestingly, there was no offset loss in the number of part-time culture jobs in 1999. In fact, there was an 8% increase in part-time culture jobs while the general labour force saw part-time employment drop 3.1%.

It was a good year for full-time performing arts and audio-visual jobs, which increased 18% from 1998. Other disciplines that experienced full-time job growth were architecture, printing and fine and commercial art occupations. Conversely, heritage and library jobs showed some decreases in both full-time and part-time jobs. In general, part-time jobs have always been a common feature in the culture labour force. Certain culture disciplines have a higher likelihood of working part-time than others. For example, writing-related jobs tend to be part-time occupations and in fact, they generated the bulk of the increase in culture part-time job growth in 1999. The proportion of culture workers who worked part-time was 23% in 1999, unchanged from 1998. The main reasons given by culture workers for working part-time in 1999 were personal preference (34%) and economic reasons (29%).

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1 *Culture jobs/workers consist of a list of 43 occupations classified using the 1991 Standard Occupational Classification System. The occupations were chosen based on the* Canadian Cultural Statistics Framework *and are used by other culture labour force researchers.*

2 *The Culture Statistics Program has been using the Labour Force Survey to provide benchmark annual employment data for the last several years. The supply of the cultural labour force is measured in this article using occupations as the unit of analysis. In this sense, it does not take into account workers in culture industries that do not have a definite 'cultural' occupation or profession. Furthermore, it does not distinguish between culture workers who work in or outside of culture industries.*

Number of culture employees rose faster than self-employed in 1999

There was record culture employee growth in 1999. The number of culture employees increased by just over 31,000 jobs or 12.2% in 1999, the largest annual rate of growth observed in the nineties. In fact, culture employee jobs grew four times more than all employee jobs in the total labour force. The main reason for this growth was an increase in the number of culture employees working in the private sector[3]. Between 1998 and 1999, culture employees in the private sector increased 17% whereas culture employment in the public sector declined 4%. In comparison, the number of employees in the total labour force who worked in the private sector increased 3% while public sector employees grew by approximately 4% in 1999.

Overall, self-employment increased by 46,000 (1.9%) in the total labour force last year, one of the smallest increases of the decade. Culture self-employment was, however, quite an exception. Self-employed culture jobs increased by 9,400 jobs (6.3%) continuing the upward trend recorded throughout the nineties. Self-employment is a striking feature of the culture labour force. Culture occupations depend heavily on creative self-expression and entrepreneurial skills; indeed, roughly 36% of all employed culture workers were self-employed in 1999.

[3] *The public sector includes employees in public administration at the federal, provincial and municipal levels as well as in Crown corporations, liquor control boards and other government institutions such as schools (including universities), hospitals and public libraries. The private sector comprises all other employees (Source: Guide to the Labour Force Survey).*

Provincial Data

Most often in our analysis of data trends, we look at the national picture only, and do not highlight particular provincial or territorial patterns. In order to place more provincial culture data in front of our users, we are presenting selected provincial trend data in each issue of *Focus on Culture*. This time, we have chosen to include indicators on book publishing and radio. Our next issue will feature data on a number of other cultural industries.

Table 1

Employment increased in nearly every culture discipline compared to last year

Occupations	1999	% change from 1990	% change from 1998
Heritage and library	42,736	-15.9	-9.9
Writing, editing and related	56,300	27.6	3.9
Architecture related	19,544	5.9	23.3
Performing arts and audio-visual related	124,225	43.1	12.6
Fine and commercial arts	137,330	31.0	13.6
Printing related	67,267	17.2	15.6
Culture	447,396	23.4	10.0
Total	**14,531,200**	**11.1**	**2.8**
% Culture workers	**3.1**		

Source: Labour Force Survey, Annual Averages.

Table 2

Unemployment rate for culture occupations remains lower than the national average

Occupations	Unemployment rate		
	1990	1998	1999
Management	3.1	2.6	2.3
Business, finance and administrative	5.1	3.9	3.9
Natural and applied sciences and related	4.1	3.4	3.4
Health	1.8	1.6	1.5
Social sciences, education, government service and religion	3	3.1	2.6
Sales and service	7.6	6.3	6.1
Trades, transport and equipment operators and related	10.1	8.4	7.6
Occupations unique to primary industry	8.6	9.9	9.8
Occupations unique to processing, manufacturing and utilitie	10.6	7.9	7.2
Culture	**5.3**	**3.8**	**3.8**
Total	**8.1**	**8.3**	**7.6**

Source: Labour Force Survey, Annual Averages.

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Table 1

Profile of Book Publishing and Exclusive Agency in Canada, 1998-99

		Atlantic region	Quebec	Ontario region	Prairie	B.C.
Firms						
Publishers	No.	32	216	249	78	68
Exclusive agents	No.	-	18	30	4	5
Titles published[1]	No.	**234**	**4,135**	**8,772**	**416**	**882**
Textbooks	No.	23	1,115	1,679	118	363[2]
Children's books	No.	15	787	789	27	72
Tradebooks	No.	196[3]	1,519	3,843	226	447
Other	No.	x	714	2,461	45	
Titles reprinted[1]	No.	**108**	**3,831**	**5,485**	**394**	**444**
Textbooks	No.	4	2,012	2,949	141	203[4]
Children's books	No.	13	630	526	48	55
Tradebooks	No.	91[3]	902	1,447	205[3]	x
Other	No.	x	287	563	x	186
Total in print[1]	No.	**2,650**	**41,882**	**45,759**	**4,334**	**5,689**
Textbooks	No.	265	13,515	16,984	936	3,923[4]
Children's books	No.	250	4,417	4,423	340	503
Tradebooks	No.	1,781	17,349	16,314	2,108	x
Other	No.	354	6,601	8,038	950	1,263
Sales in Canada	$'000	**9,307**	**407,993**	**1,181,757**	**25,888**	**61,746**
Own titles[1]	$'000	**9,307[5]**	**239,263**	**441,397**	**25,888[5]**	**25,527**
Textbooks	$'000	761	110,773	155,256	5,419	16,815[4]
Children's books	$'000	397	29,495	26,377	1,602	1,584
Tradebooks	$'000	8,149[3]	44,569	125,489	15,853	x
Other	$'000	x	54,426	134,275	3,014	7,128
Exclusive agency	$'000	x	**168,730**	**740,361**	x	**36,219**
Textbooks	$'000	x	4,531	252,915	x	x
Children's books	$'000	x	41,604	97,416	x	x
Tradebooks	$'000	x	79,418	355,670	x	x
Other	$'000	x	43,176	34,360	x	x
Exports and other foreign sales	$'000	**1,022**	**62,098**	**345,839**	**6,309**	**9,991**
Personnel						
Full-time employees	No.	116	1,930	4,635	287	406
Part-time employees	No.	35	284	823	91	65
Total personnel expenses[6]	$'000	**3,504**	**86,720**	**237,025**	**10,966**	14,262
Total revenue	$'000	**11,853**	**511,936**	**1,567,723**	**38,125**	**78,825**
Cost of sales	$'000	**5,857**	**286,013**	**779,047**	**15,815**	**46,069**
Total operating expenses	$'000	**5,805**	**209,703**	**670,387**	**20,988**	**31,335**
Before-tax profit margin	$'000	**192**	**16,219**	**118,290**	**1,322**	**1,420**
% of firms with a profit	%	50	62	54	59	48

1 *Includes the activities of publishers only.*
2 *Includes information for textbooks and other types of books.*
3 *Includes information for tradebooks and other types of books.*
4 *Includes information for textbooks and tradebooks.*
5 *Includes information for both own title and exclusive agency sales.*
6 *Includes salaries of full and part-time staff as well as outside fees.*

Table 2

Percentage share of radio listening by format by province shows country most popular in Newfoundland and talk shows in Quebec, while adult contemporary is the most listened to overall, fall 1999

Station format	Province										
	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta	B.C.	Canada
						%					
Adult contemporary	9.4	1.1	14.5	24.3	32.5	25.3	19.4	16.1	9.1	15.0	23.0
Album-Oriented rock	-	0.1	18.3	0.1	3.6	3.3	0.0	14.9	17.0	8.6	6.0
Canadian Broadcasting Corporation	10.9	17.1	16.8	14.2	7.6	8.7	10.3	12.5	8.8	13.7	9.7
Contemporary	18.1	30.8	0.7	0.3	20.1	8.2	7.4	0.1	11.1	9.2	11.2
Country	54.8	35.9	30.3	18.6	1.4	8.5	21.0	39.7	26.5	10.5	12.0
Easy listening	-	-	-	0.0	0.1	4.1	0.5	0.1	2.0	5.8	2.5
Gold/ oldies/ rock	1.6	13.7	15.9	19.2	2.8	17.3	19.1	6.1	10.7	12.8	11.9
Middle-of-the-road	-	-	-	-	5.9	1.0	3.8	0.0	0.0	0.8	2.1
Other	5.2	1.0	2.1	17.8	7.7	6.0	18.3	3.3	9.7	4.6	7.1
Sports	-	-	-	-	0.0	0.2	-	-	-	-	0.1
Talk	-	0.0	1.4	0.1	16.8	11.7	0.0	6.9	4.5	13.9	11.1
U.S. stations	-	0.3	0.0	5.6	1.4	5.7	0.2	0.3	0.6	5.1	3.4
Total listening	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

- *Nil or zero*

□

Announcing the Release of *Canadian Culture in Perspective: A Statistical Overview*

While *Focus on Culture* reports quarterly on research of general interest, as well as appealing to specific market segments, the Culture Statistics Program (CSP) also produces an occasional publication entitled *Canadian Culture in Perspective: A Statistical Overview*. This publication provides a broader perspective of the changing cultural landscape in Canada. Data from all the CSP surveys, as well as from other internal and external sources are brought together in one comprehensive product that presents the most complete picture possible of the health and vitality of culture in Canada. The broad outlook permits the reader to understand the face of cultural activities and industries as a whole, tracing common themes, and trends over time. The publication appeals to many of our readers of *Focus on Culture*, but goes further in depth and breadth and is particularly valuable as an educational tool. It provides a benchmark against which the data released in the Statistics Canada *Daily,* and presented in *Focus,* are put in context.

The 2000 edition of *Canadian Culture in Perspective: A Statistical Overview* starts with a chapter on the economic dimensions of the culture sector (such as the economic impact of the culture sector, culture activities by tourists and the international trade position of the culture sector). We then explore social dimensions of culture, including sections on the culture labour force, philanthropic behaviour in the culture sector and the consumption of culture goods and services. In the third chapter, various sectors such as heritage, the performing arts and libraries are looked at in some depth. Ownership and content issues in the culture industries (publishing, film, broadcasting and music) are explored in the fourth chapter. The publication concludes with a chapter on data quality and methodology.

The next edition of *Canadian Culture in Perspective: A Statistical Overview* is due out at the end of November. You may call our toll-free number 1-800-267-6677 to order a paper copy (quote catalogue number 87-211-XPB, $31.00) or an electronic (internet) version (quote catalogue number 87-211-XIB, $23.00).

How to Find Out More.....

We hope you find this bulletin both informative and useful.
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Subscription Information

All prices exclude sales tax

This product, Catalogue no. 87-004-XPB, is published quarterly as a standard printed publication at a price of CDN $9.00 per issue and CDN $27.00 for a one-year subscription.
ISSN 0843-7548

The following additional shipping charges apply for delivery outside Canada:

	Single issue	Annual subscription
United States	CDN $ 6.00	CDN $ 24.00
Other countries	CDN $ 10.00	CDN $ 40.00

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ISSN 1481-1030

Note of appreciation
Canada owes the success of its statistical system to a long-standing partnership involving Statistics Canada, the citizens of Canada, its businesses, governments and other institutions. Accurate and timely statistical information could not be produced without their continued co-operation and goodwill.