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Radio listening maintains its audience, fall 2000

By Lotfi Chahdi

The face of radio as well as the content of radio programs have changed radically since the early days. In fact, such changes were necessary for radio to survive and to prove wrong those who had predicted its demise, especially when television came on the scene. Among the decisive changes in the history of radio have been developments in the field of electronics that made radios portable, the decline of AM stations and the proliferation of FM stations, Internet radio and digital radio.

This article will focus on trends in radio listening with an emphasis on Statistics Canada's most recent data, namely fall 2000.

Radio listening in Canada remained stable

On average, Canadians listened to the radio 20.3 hours per week, almost the same level of listening as in the previous two years. In fact, the average hours of tuning per listener has been consistent over the past fifteen years (Figure 1). According to Kiefl[1], the time we devote to radio has been remarkably stable for many decades. Audience surveys, adjusted for methodological change, reveal that the average Canadian aged twelve and over has spent roughly 20 hours per week listening to the radio since reliable industry surveys have been conducted.

Anglophones in Quebec avid radio listeners

Overall, Quebeckers were the most avid radio listeners in twelve out of the fifteen years for which we have comparable data (1986 to 2000). In seven of those years, Newfoundlanders recorded the lowest weekly hours of radio listening.

1 *Kiefl, Barry, "50 Years of Canadian Radio and TV: Do Canadians still hear and see themselves?", A paper presented at the Professional Market Research Society, June 6, 2000.*

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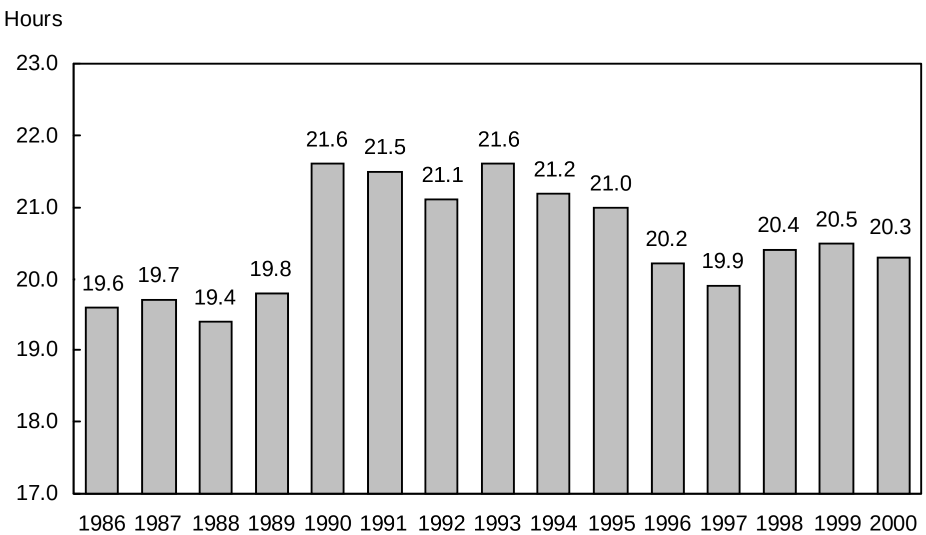
Note to readers

The findings that appear in this article are based on a survey of 85,464 Canadians aged 12 and older. The data on listening covers seven specific days and was collected using a log-type questionnaire over an eight-week period from September 4 to October 29, 2000. Although the 44.4% return rate was not very high compared with Statistics Canada's standard, it is similar to those observed in the radio industry in Canada and elsewhere in calculations of the number of listeners. It is recommended that the data be interpreted with caution.

The radio project of the Culture Statistics Program is a joint endeavour of the Canadian Radio-Television and Telecommunications Commission (CRTC), the Department of Canadian Heritage, and Statistics Canada.

Statistics Canada's Radio-Listening Data Bank is comprised of files from a variety of sources. The basic data on listening was acquired from the BBM Bureau of Measurement and reflects the demographic characteristics of survey respondents. The information on the formats of specific radio stations was provided by the CRTC.

Figure 1
Average weekly hours of radio listening, Canada, fall 1986 to fall 2000



After several years in the lead, Quebeckers are now third in terms of listening time, very close to the national average (20.7 hours compared with 20.3). However, Quebec anglophones, despite a decrease in their average listening time of almost one hour compared with fall 1999, are by far the most avid radio listeners in the country. In fall 2000 they listened to the radio an average of 22.4 hours per week.

Radio is least popular with teens

Teens (aged 12-17) make up the age group that listens to radio the least; their listening time (10.5 hours per week in fall 2000) was half that of adults (20.3 hours). This pattern has been consistent for the past fifteen years.

The difference in the habits of teens and adults in terms of listening time is not surprising, since adults have easier access to radio than do teens during week days (at the office, for example). During the week, close to one third of adult listening takes place between 10:00 a.m. and 3:00 p.m., while only 9% of adolescent listening occurs during those hours. On weekends, teens increase their listening time substantially during the day, reaching almost the same proportion as that of adults (37% and 40% respectively).

Exponential growth of FM stations to the detriment of AM stations

Audio technology has improved and this has affected radio listening. Radio listeners have become more demanding and audio quality is as important as content. The growth in the audience of FM stations at the expense of AM stations is a testament to this fact. FM did not really establish itself until the early 1980s. Since then, FM stations, with their much superior sound quality, have more than doubled their audience share[2]. In 2000, there were 613 operating radio stations (489 commercial and 124[3] non-commercial) in Canada. FM stations predominated with 369 operating stations, or 60% of the total. This compares with 594 operating stations in 1993 (45% were FM).

FM stations have seen a phenomenal growth in their market share over the past two decades.[4] Until 1990, the listening share of AM

2 *Ibid.*
3 *CBC is counted here as one AM station. In their 2000 report they have listed 26 AM stations and 38 FM stations but we do not know if they are originating stations or not. Also the number of non-commercial stations is underestimated as some smaller units are missing.*
4 *Statistics Canada published data on radio listening for the first time in 1982.*

stations, while steadily decreasing, was higher than that of FM stations. In fall 1991, both bands had an equal proportion of listening time. This was followed by a surge in the listening time of FM stations to 72% of total listening by fall 2000. The reasons for this shift are varied and include sound quality, technical and programming characteristics and the tendency of some car manufacturers to install FM-only receivers in automobiles.

FM stations are very popular among younger people but their popularity gradually decreases as age increases. Men and women aged 65 and older preferred AM stations. This can partly be explained by the fact that the talk format predominates among AM stations and talk radio is the most popular format among older persons (25% of total listening among men and women aged 65 and older in fall 2000). Another possible reason for this pattern is that older persons are loyal to stations that they have listened to for many years (AM stations having been more popular in the past).

Adult contemporary continues to dominate

The popularity of a station depends not only on the band on which it is broadcast, but also on its format and thus the type of listeners it targets. Radio stations are categorized according to the format of the programs they broadcast (see box p. 5). Stations are not confined to one type of specific programming based on format, but the latter determines the station's main focus. In general, radio stations can be divided into two main categories: music and other formats (talk, CBC,[5] sports and U.S. stations).

Radio: A major transformation

We have witnessed a major transformation in the radio industry in which certain stations, unable to remain profitable, have had to revamp their formats completely, apply to the CRTC for a transfer from the AM to the FM band in order to attract more listeners in a specific age group, or simply cease operating. The most recent case is that of CHUM 1050 Toronto which after many successful years as a popular music station on the AM band had some difficult years and finally ceased operating on January 22, 2001. It joined a group of AM stations to form an all-sports radio network.

However, it is not currently possible for all stations to have their frequencies in the FM band. First, there is a limited number of AM and FM frequencies for the various markets. In addition, the CRTC regulates multiple ownership. Until April 1999, the CRTC limited ownership rights to one AM station and one FM station in the same market. The CRTC's new policy now permits ownership of two AM stations and two FM stations for each market of eight stations or more operating in a given language. For markets in which there are fewer than eight stations in a given language, ownership of three stations is authorised but broadcasting must take place on both the AM and FM bands.

Stations which present a musical format captured the largest share of total listening: 70% in fall 2000. The adult contemporary format is the first choice of listeners, accounting for one-quarter (25%) of their total listening. Lagging far behind is the category of gold/oldies/rock (14%) and country music (11%).

Although the adult contemporary format was the most popular format at the national level (Figure 2), such was not the case in all provinces. In six of the ten provinces (Newfoundland, Saskatchewan, Prince Edward Island, Nova Scotia, Alberta and New Brunswick), the most popular format was country music (Table 1).

The popularity of various formats varied by age groups. Teens (aged 12-17) preferred the contemporary format – in fall 2000 they spent an average of 23% of their listening time tuned to this format, with adult contemporary (21%) and gold/oldies/rock (19%) following closely behind. Adults (aged 18-64) spent most of their listening time tuned into adult contemporary. Older adults (aged 65 and over) spent over 50% of their listening time tuned into the CBC or talk formats.

In fall 2000, adult men spent a larger share of their listening time tuned into album-oriented rock stations than did adult women (11% and 5% respectively). The opposite was true for the adult contemporary format where adult women spent a larger share of their listening time tuned into this format compared with adult men (26% and 21% respectively). There were no differences between the sexes for any of the other formats.

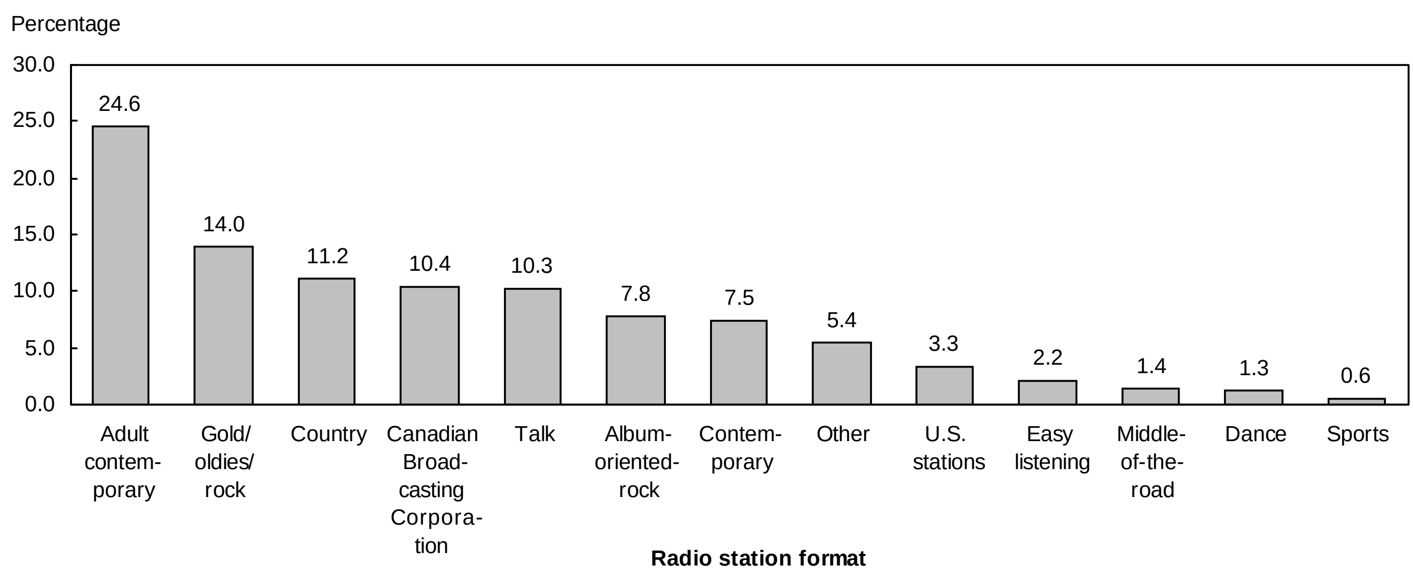
Preferences for particular formats also varied by level of education. The higher the level of education, the higher the share of radio listening time was spent on the CBC. In fall 2000, Canadians with a grade school education or less spent 4% of their radio listening time

[5] *CBC (Canadian Broadcasting Corporation) stations are grouped according to a separate formula since they are not commercial and offer a particular type of information and programming.*

Table 1
Percentage share of radio listening by format by province, fall 2000

Station format	Canada	Province									
		Nfld	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta	B.C.
						%					
Adult contemporary	24.6	24.2	31.2	8.0	18.9	30.3	27.3	24.1	18.3	15.1	20.0
Album-oriented-rock	7.8	18.1	1.8	0.7	9.7	2.8	8.1	7.3	9.9	12.0	13.3
Canadian Broadcasting Corporation	10.4	12.6	21.4	17.8	16.5	7.7	9.7	9.9	12.5	8.5	15.1
Contemporary	7.5	0.6	1.6	17.0	0.1	14.0	4.3	0.8	1.7	6.3	9.2
Country	11.2	25.2	35.7	26.7	24.7	1.3	8.3	20.8	40.3	25.3	8.9
Dance	1.3	-	-	-	-	1.2	2.6	-	-	-	-
Easy listening	2.2	-	-	-	-	-	4.9	0.3	-	2.8	-
Gold/oldies/rock	14.0	10.1	7.9	23.2	8.4	15.3	13.3	14.4	11.9	15.8	12.2
Middle-of-the-road	1.4	-	-	-	-	4.2	0.3	3.7	2.2	-	0.5
Other	5.4	9.2	0.2	4.7	13.6	8.1	5.0	3.3	2.7	4.2	1.9
Sports	0.6	-	-	-	-	-	1.5	-	-	-	-
Talk	10.3	-	0.1	1.6	2.2	13.7	9.2	14.9	0.1	9.8	13.8
U.S. stations	3.3	0.1	-	0.2	5.9	1.4	5.6	0.7	0.4	0.3	5.1
Total listening	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Average weekly hours of radio listening	20.3	19.3	19.6	21.2	18.8	20.7	20.6	20.6	19.8	21.4	18.5

Figure 2
Adult contemporary music is the most popular with radio listeners in Canada, fall 2000



tuned into the CBC while those with a university degree spent 27% of their listening time on this format.

Occupation also played a role in the preferences of radio formats. The adult contemporary format was the most popular, in terms of the share of listening time, for almost all the occupation groups. There were, however, a few exceptions. Canadians whose occupations were as farmers, farm workers, in fishing, those who were retired or unemployed all spent the largest share of their radio listening time tuned into the country format. Canadians whose occupations were in the artistic or recreation sector spent the largest share of their listening time on the CBC while students spent the largest share of their time tuned in to the gold/oldies/rock format.

Format description

The following descriptions provide a general understanding of the radio formats available in Canada and the United States.

Adult contemporary: soft-rock and pop music which appeals to an 18-34 or 25-44 audience depending on its music orientation.

Album-oriented rock: while some stations rely heavily on established rock artists others program lesser known artists and album cuts. Some stations also program less mainstream forms of music such as Rhythm 'n Blues, or Fusion Jazz. It appeals mostly to an 18-34 audience.

CBC: Canadian Broadcasting Corporation stations (English and French).

Contemporary: largely programs current hits and appeals to a 12-34 audience. The format is largely music-oriented with little talk. A hit is defined as a selection that has entered the Top 40 in a major trade magazine.

Country: programs country music almost exclusively and appeals to a 25+ audience.

Dance: largely programs dance music with varying degrees of rap and contemporary hits and appeals to a 12-34 audience.

Easy listening: programs soft largely instrumental music and appeals to a 35+ audience. The programming often includes cocktail jazz, soft jazz and classics.

Gold/oldies/rock: largely programs past hits and selections released within the past 30 years and appeals to a 25-44 audience.

Middle-of-the-road: programs pop and soft vocal music and appeals to a 35+ audience. Tends to program artists and selections released prior to 1970.

Other: includes community, educational, ethnic, religion, travel and weather programming.

Sports: sports and sports-oriented programming.

Talk: programs a substantial amount of talk radio which can include public affairs, sports, business and news programming.

The future of radio

On the whole, radio listening continues to take up a large percentage of Canadians' time, whether for becoming better informed, listening to music or for entertainment, despite all the other demands on their leisure time and competition from other forms of entertainment. One of radio's major advantages is the fact that people can listen to it while performing other activities.[6]

Radio is, however, facing fundamental technological and market changes. Many of these changes are being brought about by the introduction of digital technology. Digital radio is the transmission of sound which has been processed using technology comparable to that used in compact disc players. At the listening end, digital radio receivers provide a standard of sound quality that is significantly better than conventional analog radio. Eventually digital radio is expected to replace the existing AM and FM analog bands. Radio broadcasters will have the opportunity to make the transition to a new technology which will offer superior sound quality and interference-free transmission as well as new value-added services like data transmissions.

Another technological revolution in the radio industry is taking place because of the Internet. Internet radio, which involves streaming audio live over the Internet, seems to have unlimited potential. It does not require huge radio towers or much infrastructure. Listeners tune in by accessing a website; the role of receiver is played by various software programs. In fact, you can now operate your own radio channel from home. The ease of use means that it is possible to tailor an infinite number of channels to what listeners want.

Time will tell if and how radio will be affected by these technological changes. Stay tuned!!

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[6] *The Canadian Pilot Time Use Study – 1981 showed that 95% of total radio listening is considered to be a secondary activity.*

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International trade in culture commodities: A semi-annual review, 2001

By Michel Durand

In Canada, a tremendous number of jobs in the culture sector have been created and sustained by international trade activities. The export of Canadian culture products and the importing of foreign products into Canada provide a substantial boost to our economy each year. In the first six months of 2001, international trade (exports and imports combined) in culture commodities was worth over $3.5 billion, an increase of $187 million or 5.6% over the same period in 2000 (tables 1a and 1b).

Analysis contained in this article is based upon newly available culture commodity trade figures for the first six months of 2001[1]. Rather than wait for year-end data, it is useful to examine mid-year figures to ascertain whether they reflect earlier trends in culture trade. Culture commodities made up over 52% of Canada's total export of culture products and over 65% of imported culture products in 2000, with transactions associated with culture services and intellectual property (IP) accounting for the rest. As such, mid-year analysis of culture commodities provides an excellent window on the status of Canadian trade in culture products.

January to June culture commodity exports grew 9.6% annually between 1996 and 2000, outstripping the growth rate of culture commodity imports significantly, which only grew at an annual rate of 3.5%.[2] However, this situation changed dramatically in the first half of 2001,

How do we measure Canada's culture trade?

Statistics Canada measures Canada's international culture trade position using an accounting system that is made up of the exchange of three components: culture commodities, culture services and intellectual property. The net trade position is the difference between Canada's exports and imports of culture. This article focuses on culture commodities.

Culture commodities (or goods): the main physical outputs produced by industries and activities, e.g. books and printing services, music and other recordings, visual arts, etc. See table 3 for a listing of products defined as commodities. Exports and imports of this type must physically cross borders.

Culture services: are not physical goods but are services performed. Monetary transfers measure imports and exports of services. Examples include copyright collective services, editorial services, guest artist fees, etc.

Cultural intellectual property (IP): transactions in cultural products include intangible goods to which ownership rights apply, and payments are paid for the use or redistribution of the product. Examples include royalties, licensing fees, etc.

Table 1a

International trade in culture commodities worth over $3.5 billion in first six months of 2001

Trade position: culture commodities	January to June						% change 1996 to 2001
	1996	1997	1998	1999	2000	2001	
	Value ($000,000)						
Exports	753.4	730.0	836.4	948.0	1,085.2	1,149.5	52.6
Imports	1,944.5	2,520.8	1,985.7	2,165.7	2,233.1	2,355.9	21.2
Net flow (deficit)	(1,191.1)	(1,790.8)	(1,149.3)	(1,217.7)	(1,147.9)	(1,206.4)	1.3
Total value of trade in commodities	2,697.9	3,250.8	2,822.1	3,113.7	3,318.3	3,505.4	29.9
Ratio (import/export)	2.6	3.5	2.4	2.3	2.1	2.1	-20.5
Ratio (export/import)	0.4	0.3	0.4	0.4	0.5	0.5	25.6

Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

Table 1b

Culture commodity imports growing almost as fast as exports in first six months of 2001

Annual growth: culture commodities	January to June				
	1997	1998	1999	2000	2001
Exports	-3.1	14.6	13.3	14.5	5.9
Imports	29.6	-21.2	9.1	3.1	5.5
Net flow (deficit)	50.3	-35.8	6.0	-5.7	5.1
Total value of trade in commodities	20.5	-13.2	10.3	6.6	5.6

Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

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1 *Statistics Canada disseminates monthly data on merchandise trade, including culture commodities, approximately fifty-five days after the reference period, making it one of the more timely data sources available.*

2 *See Cindy Carter and Durand, Michel, " Market opportunities: International trade of culture goods and services",* Focus on Culture, *Vol. 12, No. 4 (Winter 2000), Cat. No. 87-004-XIB or 87-004-XIP for more detailed analysis of 1996 to 2000 data.*

with imports growing almost as fast as exports (5.5% compared to 5.9%) over the same period in 2000 (table 1b).

Exports are the major engine of growth for the culture sector

As the domestic market for culture goods and services continues to be soft, the export market has become the major engine of growth for the culture sector. Many factors are responsible for the competitiveness of the sector: maturing cultural industries; improved private and public sector partnerships; increased investment, marketing and promotion efforts; and generally, an active international trade environment. A broad range of government export policies and programs exist to help culture sector organisations meet the challenges and opportunities of this market. They include trade negotiations, agreements and promotion; co-ordinated federal, provincial and private sector representational efforts; and Canadian and provincial trade offices in major traditional markets and promising new trade areas.

During the last few decades, an incredible proliferation of culture activity has taken place in all parts of Canada. The Atlantic region, Quebec, Ontario, the Prairies, British Columbia, the Northwest Territories, and the Yukon are alive with numerous ambitious cultural undertakings. Consequently, a large and rapidly expanding supply of high-quality culture products (from the arts, crafts, Native, and Inuit sculptures and prints, recordings, videos, books, radio and television programs) are available for distribution and sale abroad. These products serve to broaden and deepen knowledge and understanding of Canadian culture in other parts of the world while providing an additional source of income for Canadian artists and businesses.

In the first six months of 2001, culture commodity exports totalled just under $1.2 billion, increasing at a more modest pace (5.9%) than the double-digit rate of previous years (table 1b). Nevertheless, the sustained growth of exports is an indication that people in other parts of the world are becoming conversant with Canadian culture creativity and continue to develop strong bonds and links with the Canadian culture sector. This may be fostered by Canada's multicultural and multiracial character.

Canada's top export markets for cultural commodities in 2001 were the United States and Western Europe. By any measure, the United States continues to be our most important export market. During the first six months of 2001 the United States received over 95% of our culture commodity exports (table 2), a total of almost $1,097 billion. Although exports to the U.S.A. were high in previous years, the U.S. market share of our exports has reached another peak, increasing by more than 67% or $440 million over 1996.

There continues to be a steady decline in the market share held by some of our traditional markets in Western Europe (e.g., United Kingdom, France, and Germany). Exports to Western Europe decreased by $17 million from the previous year. Comparing the first six months of 1996 and 2001, we can see a total reduction of trade by close to 57%. In fact, exports to all non-North American markets fell by 45%, or $46 million, in the same period. This decline is thought to be due to slower economic growth in Europe as compared to North America and the Pacific Rim but also because of increased inter-European trade.

Table 2

United States received over 95% of our culture commodity exports in first six months of 2001

Exports by region	January to June						% change 1998 to 2001 (Jan. to June)
	1996	1997	1998	1999	2000	2001	
	Value ($000,000)						
North America							
- United States	655.9	640.7	765.6	890.3	1,015.0	1,096.7	67.2
- Other	0.1	0.0	0.0	0.0	0.0	0.0	
- Sub-total	656.0	640.7	765.6	890.3	1,015.0	1,096.7	67.2
Western Europe							
- United Kingdom	12.7	18.4	12.4	10.7	15.8	10.0	-21.3
- France	14.9	8.7	10.6	8.6	8.2	5.0	-66.4
- Germany	12.2	6.5	7.0	5.0	6.3	3.4	-72.1
- Other	23.2	18.7	12.4	9.8	13.8	8.8	-61.9
- Sub-total	63.0	52.3	42.4	34.1	44.1	27.2	-56.8
Other regions	34.4	37.0	28.4	23.6	26.1	25.6	-25.6
Total	**753.4**	**730.0**	**836.4**	**948.0**	**1,085.2**	**1,149.5**	**52.6**
	Distribution (%)						
North America	87.1	87.8	91.5	93.9	93.5	95.4	9.6
Western Europe	8.4	7.2	5.1	3.6	4.1	2.4	-71.7
Other	4.6	5.1	3.4	2.5	2.4	2.2	-51.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	

Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

Our dependence on the American market has raised some concerns. The Department of Canadian Heritage has suggested that "Although the primary destination for Canadian exports of cultural goods and services will likely continue to be the U.S.A., Canadian cultural exporters need to diversify their markets. Europe is a priority market; Asia and Latin America are emergent markets. The longer-term viability and competitiveness of the sector, given the relatively limited size of the domestic market, will increasingly depend on international business successes."[3]

Most of our culture commodity exports are print-related products (books, newspapers, periodicals, and other written material), and recordings (music, video, software and other recordings) (table 3). Together they represented almost 55% of culture commodity exports in the first six months of 2001. The market share of these commodities dropped almost 11 percentage points over the figures reported five years earlier, an indication that exports are becoming more diversified. Other culture products (e.g., exposed film, visual arts, advertising material, architectural plans, and other pictorial material) are beginning to penetrate foreign markets as well.

Table 3

Print-related products and recordings accounted for 55% of culture commodity exports in first six months of 2001

Exports ($000,000)	January to June						% change 1996 to 2001 (Jan. to June period)
	1996	1997	1998	1999	2000	2001	
Books & printing services	122.3	152.3	188.2	182.8	178.5	244.3	99.8
Newspapers & periodicals	91.5	80.3	89.1	102.8	125.2	100.3	9.6
Other written material	14.3	14.9	21.4	35.2	42.6	63.1	341.3
Music, video, software & other recordings	268.3	182.1	179.1	223.0	236.8	223.8	-16.6
Printed music	0.1	0.6	0.0	0.1	0.2	0.3	200.0
Visual arts – original art	19.0	24.6	26.7	24.2	59.6	35.1	84.7
Visual arts – other art	17.6	21.3	20.8	18.9	18.1	19.7	11.9
Architectural plans	2.3	11.5	1.9	0.7	1.3	0.9	-60.9
Other pictorial material	66.5	87.3	108.1	117.8	123.5	125.2	88.3
Advertising material	101.5	109.2	150.4	171.4	211.4	229.2	125.8
Exposed film	50.0	45.9	50.7	71.1	88.0	107.6	115.2
Total	**753.4**	**730.0**	**836.4**	**948.0**	**1,085.2**	**1,149.5**	**52.6**

Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

But imported culture commodities remain popular

Along with a strong export performance, Canadians continue to have a strong interest in the culture products created in other countries. Every year thousands of people, products, information, and images pour into Canada from other parts of the world. Our bookstores, news-stands, record shops, cinemas and television screens testify to Canada's position as one of the greatest importers of cultural products in the world. We enjoy our access to other cultures. Furthermore, Canadians are among the most travelled people in the world, thereby benefiting from exposure to other cultures and their respective worldviews, values, traditions, and beliefs. All aspects of Canadian culture benefit from this interactive process. Canada's economic, commercial, financial, and social interests gain by exposing Canadians to the products of other countries, as well as deriving stimulation, imagination and energy from the works of foreign artists.

The value of imported culture commodities for the first six months in 2001 reached almost $2.4 billion, increasing 5.5% over the same period a year earlier (table 1b).

As well as being our growing and largest export market, the United States is still our main source of culture products, representing for the first six months of 2001, 81% of all culture commodity imports, a total of close to $1.9 billion. However, growth of imports from the United States are not growing as quickly as are our exports to that country. Imports show growth of just over 14% since the first quarter of 1996 compared to a growth in exports of more than 67% (table 4).

In fact, culture goods from other countries, particularly in Western Europe, are gaining ground. They accounted for close to 12% of total commodity imports over the same period, increasing almost two percentage points in the last five years. In dollar terms, however, the value of imports from other countries continues to be substantially lower than those from the United States.

Print-related products and recordings captured about 77% of our culture imports in 2001. Similar to our sales of print-related products and recordings, these products lost some ground in the import market, in terms of total market share,

[3] *Department of Canadian Heritage, Fact and Figures: Cultural Development, August 2001, http://www.pch.gc.ca/culture/fact-info/english.htm*

Table 4

Some diversity in country of origin for imported culture commodities in the first six months of 2001

Imports by region	January to June						% change 1998 to 2001 (Jan. to June)
	1996	1997	1998	1999	2000	2001	
	Value ($000,000)						
North America							
- United States	1,659.4	1,797.0	1,679.5	1,817.1	1,825.7	1,895.5	14.2
- Other	5.1	5.6	8.5	9.7	16.3	15.2	197.2
- Sub-total	1,664.5	1,802.6	1,688.0	1,826.8	1,842.0	1,910.7	14.8
Western Europe							
- United Kingdom	57.3	78.6	69.8	69.6	84.0	93.5	63.2
- France	66.0	70.4	77.6	80.5	87.5	88.8	34.5
- Germany	14.9	12.5	12.6	15.4	16.0	24.5	64.4
- Other	54.5	43.0	38.9	45.4	45.9	68.8	26.3
- Sub-total	192.7	204.5	198.9	210.9	233.4	275.6	43.0
Other Regions	87.3	513.7	98.8	128.1	157.6	169.6	94.3
Total	**1,944.5**	**2,520.8**	**1,985.7**	**2,165.7**	**2,233.1**	**2,355.9**	**21.2**
	Distribution (%)						
North America	85.6	71.5	85.0	84.3	82.5	81.1	-5.3
Western Europe	9.9	8.1	10.0	9.7	10.5	11.7	18.1
Other	4.5	20.4	5.0	5.9	7.1	7.2	60.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	

Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

dropping 5 percentage points over 1996 (table 5). Commodities such as 'Other pictorial material' and 'Visual arts - Other' showed the greatest import growth.

Canada's net trade position: improved but still growing

Canada had a deficit for culture commodities of over $1.2 billion in the first six months of 2001, $58.5 million more than the deficit in the first six months of the previous year (table 1a). This increased deficit exists despite the fact that exports grew by 31 percentage points more than imports over the period in the study. However, given the size of imports in relation to exports, and the recent growth rate of the former, it is not surprising that Canada continues to display a large culture trade deficit.

Despite the impressive performance of Canadian culture commodity exporters in the last decade, there are concerns about the increasing trade deficit. It is expected that the increased globalisation of consumer tastes and the new communications technologies, which carry cultural products across international boundaries, will do little to improve the situation. In addition, the fact that it continues to be cheaper, even for Canadian-controlled companies, to import and distribute culture goods in Canada, than to develop, produce and market original Canadian product, must remain a significant factor in the equation.

Table 5

Print-related products and recordings captured 77% of our culture commodity imports in the first six months of 2001

Imports ($000,000)	January to June						% change 1996 to 2001 (Jan. to June period)
	1996	1997	1998	1999	2000	2001	
Newspapers & periodicals	432.4	492.8	491.7	508.6	540.4	526.9	21.9
Other written material	44.4	37.1	47.1	28.2	27.9	18.4	-58.6
Music, video, software & other recordings	551.0	792.7	415.3	576.7	567.1	603.2	9.5
Printed music	5.1	9.6	7.0	6.6	6.6	7.2	41.2
Visual arts – original art	46.0	38.8	33.4	31.2	46.0	40.5	-12.0
Visual arts – other art	63.8	76.3	74.8	89.7	108.4	166.6	161.1
Architectural plans	2.1	1.4	1.5	1.5	1.9	1.4	-33.3
Other pictorial material	115.4	179.4	123.4	138.1	143.1	204.6	77.3
Advertising material	83.0	100.8	103.5	97.0	105.0	97.6	17.6
Exposed film	35.3	39.2	31.2	35.1	34.4	27.6	-21.8
Total	**1,944.5**	**2,520.8**	**1,985.7**	**2,165.7**	**2,233.1**	**2,355.9**	**21.2**

Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics.

What the future holds

The projection of Canadian culture and learning abroad continues to be regarded as a fundamental dimension of foreign policy. The new and revitalised government interest in cultural exports coincides with federal and provincial recognition of culture as an industry and a major economic force. In the coming years, the further development of this important Canadian economic force may be strongly affected by borderless worldwide communications and an emerging global economy. As the cultural sector is being targeted, and targeted increasingly more precisely, for economic and industrial strategies, as well as for traditional cultural strategies, local and international competition for all cultural products and services will continue to increase.

It is impossible to predict precisely how the international trade environment will evolve. A combination of slow economic growth, volatile export market growth, increasing protectionism, innovative communication technologies, fluctuating interest rates and other uncertainties generated by the high public sector deficits, could all have an impact on growth in world culture demand and supply patterns for products, investment and technology exchange. It will be interesting to see whether the next six months will display the same trends.

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The Internet: Who's connected - who's shopping?

This article is a synopsis of an article published previously by the Science, Innovation and Electronic Information Division, Statistics Canada. It highlights the sections that we believe are of most interest to readers from the culture sector drawing data from the 1999 Household Internet Use Survey (HIUS). The original article, *Plugging In: The Increase of Household Internet Use Continues into 1999* by P. Dickinson and J. Ellison is available online at < http://www.statcan.ca/ Our products and services> under the headings Research Papers – Communications - Connectedness series (Cat. No. 56F0004MIE).

Data from the original article has been updated with the results of the 2000 Household Internet Use Survey, as reported in Statistics Canada's *The Daily* on 26 July 2001. For more information, please contact Jonathan Ellison (951-5882 or *jonathan.ellison@statcan.ca*), Science, Innovation and Electronic Information Division.

The Internet has certainly attracted enormous attention and generated a lot of discussion in recent years. Its diffusion and use are widely regarded as an indispensable means of future growth and development. The 1999 Speech from the Throne declared, "For Canada to generate jobs, growth and wealth, it must have a leading, knowledge-based economy that creates new ideas and puts them to work for Canadians. To do this, it is essential to connect Canadians to each other, to schools and libraries, to governments, and to the marketplace – so they can build on each other's ideas and share information"[1].

More than half of all households use the Internet

Canadians are logging onto the Internet in growing numbers. For the first time, in 2000, slightly more than half (51%) of all Canadian households[2] were regular users of the Internet. This overall penetration rate, which covers use from any location - home, work, school, a public library or other location - has

[1] *Government of Canada, 1999, "Speech from the Throne" p. 12 or http://www.parl.gc.ca/36.*

[2] *See box, which accompanies this article, that describes the Household Internet Use Survey (HIUS) and the definition of household.*

What you should know about the Household Internet Use Survey

The 2000 Household Internet Use Survey (HIUS) was administered to a sub-sample of households included in the Labour Force Survey (LFS), and therefore its sample design is closely tied to that of the LFS. The LFS is a monthly household survey based on a representative sample of households with civilian, non-institutionalised population in Canada's ten provinces. Excluded from the survey's coverage are residents of the Yukon, Northwest Territories or Nunavut; persons living on Indian Reserves; full-time members of the Canadian Armed Forces; and inmates of institutions. Altogether these groups constitute an exclusion of approximately 2% of Canada's population 15 years of age and over.

Unlike the LFS, where information is collected on each eligible household member individually, the HIUS collected information on the household as a whole. In 2000, 42,619 households were eligible for the HIUS survey and 33,832 or 79.4% responded. Results were weighted to represent the entire count of households. The data gathered in January 2001 cover household Internet use in the 2000 calendar year. The data gathered in the previous HIUS cycle in November 1999 cover the 12 months from November 1998 to November 1999. As the two cycles were collected 14 months apart, comparisons between them do not constitute annual changes.

In addition, the 1999 and 2000 surveys asked households about their use of the Internet, while the 1997 and 1998 surveys asked more generally about the use of 'computer communications'. This change in the survey question may have contributed to the reported reduction in the work penetration rate between 1998 and 1999. It is possible that some respondents who use office Intranet systems, but do not connect to the Internet from work, would respond positively to the more general term and negatively to the more specific one.

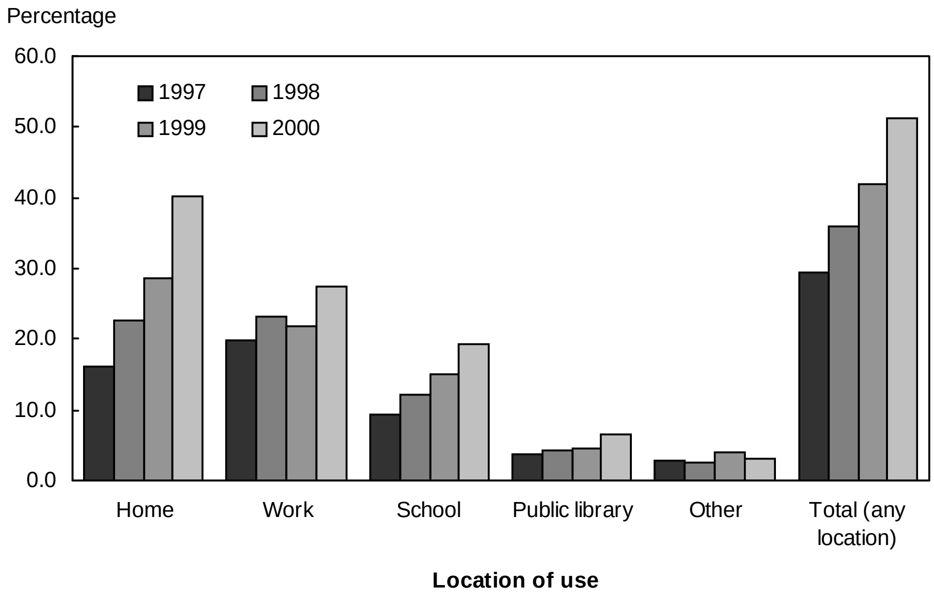
Additional information associated with definitions, concepts and methodological details for the HIUS 2000 survey can be found in the Statistics Canada publications *"Internet Use in Canada, 1999: Research Papers and Articles"* Catalogue No. 56F0003XIE, and *"Household Internet Use Survey, 2000"*, Catalogue No. 56M0002XCB. Supplementary information related to LFS methodology is contained in the Statistics Canada publication, "Guide to the Labour Force Survey", Catalogue No. 71-528-XIE.

shown significant and regular growth since 1997, when the Internet was used by only 29% of all households.

The most notable driving force behind this increase was the remarkable jump in the proportion of households using the Internet from home. In households that regularly use the Internet (regular-use households), the proportion using it from home (home-use households) has increased substantially in four years, from 16% in 1997 to 40% in 2000. The growth in home use of the Internet has exceeded that of any other location[3] (Figure 1).

Figure 1

Internet use continues to grow in Canada, particularly from the home, 1997-2000



Source: Statistics Canada, Household Internet use Survey, 1997 to 2000

Over forty percent of all households that use the Internet have at least one member using the Internet from home, and more than a quarter of households (28%) used the Internet from the workplace. Internet use from school also continued to increase, reaching 19% followed by use from a public library (7%) and other locations[4] (3%).

Along with the increased frequency of home use, the time spent on the Internet is also growing. Whereas less than half (47%) of home-use households spent at least 20 hours per month using the Internet in 1999, by 2000 this percentage had risen to 61%.

All age groups are more connected

Connectedness increased for all age groups between 1997 and 2000, although the penetration rates remained much lower for households with older heads than for those with younger heads. Two-thirds of households with heads under 55 used the Internet from any location in 2000; this dropped to just over 42% in the 55 to 64 age group, and to less than 14% in the 65-and-over group. The rate of growth of the 65-and-over group, though, is the fastest of all age groups, almost tripling since 1997.

Internet use greater in higher-educated and higher-income households

The higher the education level of the household head, the greater the likelihood that someone in the household uses the Internet. In 2000, for households where the head had a university degree, the overall penetration rate was 79%, significantly higher than those households where the head had a high school or college qualification (55%) and more than three and one-half times the rate of households in which the head did not complete high school (22%).

Given the strong relationship between education and income, it is not surprising that a similar pattern can be seen when households are categorised by income. In general, higher-income households are still more likely to use the Internet, as are households whose members had higher levels of education. However, in 2000, households with annual household incomes less than $36,000 posted a higher growth rate over 1999 (41%) for use from any location than did those households with incomes greater than $36,000 (18%). With few exceptions, penetration rates were greater at higher levels of income within each age group and lower at higher age groups within each income category.

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3 *Before 1999, most users accessed the Internet from work. Since 1999 the use of the Internet from home has exceeded any other location with respect to numbers of households and hours spent.*

4 *When asked to specify, the largest proportion of respondents using the Internet from other locations indicated that they used it from the homes of friends, neighbours or relatives.*

The richer provinces are the most connected

All provinces showed increased Internet penetration rates in 2000. The three provinces with the highest average incomes – Alberta, British Columbia and Ontario – also had the most significant rates of overall use as well as home-use. In Quebec, 44% of households used the Internet from any location in 2000 - the lowest proportion of any province. However, this was an increase from 33% in 1999 - the biggest proportionate growth of any province. Saskatchewan, New Brunswick and Newfoundland had the lowest rates of use from home in 2000.

Table 1

Home-use of Internet is becoming more diversified, 1997 to 2000

Purpose of use	2000	1999	1998	1997
E-mail	93.3	91.7	85.6	83.1
General browsing	90.1	84.7	78.1	84.7
Medical/health information	57.1	54.2	42.5	--
Travel information/arrangements	54.6	--	--	--
View the news	50.8	--	--	--
Formal education/training	47.3	32.0	29.9	--
Government information	47.1	44.1	36.4	--
Financial information	46.1	--	--	--
Playing games	45.3	42.7	34.3	--
Obtaining/saving music	44.3	27.1	--	--
Other Internet services	44.1	34.7	11.6	13.7
Finding sport-related information	43.2	--	--	--
Electronic banking	36.6	27.7	22.9	19.6
Search for employment	30.5	--	--	--
Chat groups	27.4	26.2	25.4	--
Purchasing goods/services	23.8	19.0	10.9	9.2
Listening to radio	23.2	17.5	--	--
Other specific information	--	85.1	67.9	84.4

Note: *"--" indicates a category of use not asked in that year's survey.*
Source: *Statistics Canada, Household Internet Use Survey, 1997 to 2000.*

Household use of Internet becoming more varied

The rapid increase in Internet connectedness among Canadian households has been largely driven by an increase in the proportion of households that regularly connect to the Internet from their own homes. The average home-use household is going on-line more often, more intensely and for a wider variety of uses than ever before. This is reflected in the rising proportions for almost all the Internet services that were investigated (Table 1).

For example, the connected household that does not use e-mail from home is somewhat of a rarity; in 2000 more than nine in every ten home-use households used e-mail and went to the Internet for general browsing. More than half now use the Internet from home to seek medical and health information (57%), to check travel information or make travel arrangements (55%) and to view the news (51%).

Recreational uses of the Internet are also becoming increasingly popular, including playing games (45%) and listening to radio (23%). In particular, in 2000, Napster[5] may have had a significant influence on the growth in the downloading of music from the Internet. In 1999, 27% of all Internet households downloaded music from the Internet whereas, in 2000, the figure had increased to 44%. In 2000, this represented approximately 18% of all households compared to only 8% in 1999. Using the Internet for formal education and training from home (47%) and obtaining government information (47%) have also become more common activities.

The proportion of home-use households purchasing goods and services in 2000 also grew from 24% in 1999 to 31% in 2000. E-commerce households represented just over 12% of all households in Canada in 2000.

Internet Shopping

As Internet use continues to expand and diversify, Canadians are now using the Internet for shopping - whether window-shopping or actually placing orders on-line. "I'm going shopping" can now mean logging onto the Internet rather than going to the mall or phoning in a catalogue order.

In 2000, 2.6 million households indicated that at least one member of their household had engaged in some aspect of Internet shopping from home, either using the Internet as part of their buying

5 *The issue of downloading music from the Internet has become a growing problem for the sound recording industry internationally. The industry has argued that the use of the Internet to download music, free of charge, has significantly reduced sales and the amount of royalties earned from the legal sale of sound recordings. This is a complex issue that could use more detailed research and analysis.*

Keeping track of household types

The analysis of Internet shopping is based on information collected from households that are regular users of the Internet.

Regular-use households are those that responded yes to the question "In a typical month, does anyone in the household use the Internet - from any location?"

Home-use households are those regular-use households that responded yes to the question "In a typical month, does anyone in the household use the Internet - from home?"

Internet shoppers are those home-use households that in the last 12 months engaged either in window-shopping or e-commerce.

Window shoppers are those Internet shoppers that browsed goods and services but did not place orders over the Internet.

E-commerce households are those Internet shoppers that did place at least one order over the Internet from home, regardless of whether or not they paid online. (A subset of these households made an online payment for at least one of their transactions - **e-payment**).

process by researching characteristics and prices of goods and services (window-shopping) or placing orders for purchases on-line (Table 2). These households represented 22% of all households and more than half (55%) of the 4.7 million home-use households.

Of these Internet shopping households, there were 1.5 million households (56%) that took the extra step and actually purchased items over the Internet (e-commerce), accounting for nearly a third of home-use households. These households placed 9.1 million orders[6] over the Internet with an overall value of $1.1 billion. This compares with spending of about $417 million for 3.3 million orders placed by an estimated 806,000 households during the previous survey period.[7] Nevertheless, despite the substantial increase in household e-commerce, the value of orders still accounts for a very small fraction of total Canadian consumer spending.

While there were approximately 1.1 million households that only 'window-shop', companies should not underestimate the value of this market. These households are important to Internet sellers since they are visiting Internet sites to gain familiarity with the availability of products and services and their specifications, while undertaking comparison shopping. Window shoppers have already indicated that they are at ease with using the Internet and thus could become potential clients for Internet sellers. Of course, e-commerce households also window-shop.

Household Internet shopping is an emerging facet of consumer behaviour. If the trends seen in the Household Internet Use Survey continue, we can expect a continued swelling of the ranks of both Internet window shoppers and buyers. And, as the web continues to expand in size and complexity, it would be reasonable to assume that we will see e-commerce in all its forms have an increasing presence in the culture sector.

Table 2

Number and proportions of regular-use and electronic commerce households, 2000

Households	(000's)	%			
All	11,842	100.0			
Internet, use any location	6,075	51.3			
Internet, home-use	4,753	40.1	100.0		
Internet shopper	2,594	21.9	54.6	100.0	
Window shopper	1,134	9.6	23.9	43.7	
e-commerce	1,460	12.3	30.7	56.3	100.0
e-payment	1,154	9.7	24.3	44.5	79.0

Notes: This table shows the number of households that engaged in Internet shopping, distinguishes between window-shopping and e-commerce households, and expresses them as a proportion of Internet shoppers, regular home-use households and all households.

Source: Statistics Canada, Household Internet Use Survey, 2000.

6 *Orders refer to the number of distinct transactions and may be for one or more items.*

7 *The previous survey period was from December 1998 to November 1999, while the 2000 data were collected between January to December 2000.*

Provincial and territorial data

Most often in our analysis of survey data, 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 data in each issue of *Focus on Culture*. This time, we have chosen to include recently released data on radio listening and television viewing.

Average hours per week of radio listening by province and age/sex group, fall 2000

	Canada	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta	B.C.
Total population	**20.3**	**19.3**	**19.6**	**21.2**	**18.8**	**20.7**	**20.6**	**20.6**	**19.8**	**21.4**	**18.5**
Men											
18+	21.2	19.6	20.1	22.4	19.3	21.5	21.3	21.6	21.1	23.1	19.2
18-24	17.1	14.1	8.6	20.0	17.4	17.5	16.5	19.1	17.1	19.8	14.5
25-34	21.5	18.2	21.0	24.1	18.3	22.2	21.3	22.1	24.2	23.9	18.7
35-49	22.2	21.6	22.5	22.1	20.5	22.7	22.2	20.8	22.9	24.3	20.3
50-64	21.9	20.0	21.6	23.4	19.5	21.8	22.2	23.6	20.2	24.2	20.4
65+	20.9	21.3	19.7	21.2	18.8	21.0	21.7	21.7	19.1	20.1	19.3
Women											
18+	21.5	20.9	20.9	22.4	20.9	22.0	21.9	21.6	20.9	22.0	19.5
18-24	19.2	17.5	14.7	17.4	18.3	18.5	19.6	18.1	18.9	21.7	18.5
25-34	19.6	18.2	18.6	21.5	17.1	20.8	19.4	20.7	16.9	20.5	17.9
35-49	21.5	20.9	21.7	22.7	22.2	23.0	21.9	20.2	21.3	20.8	17.7
50-64	22.9	25.4	22.5	24.4	23.1	22.6	23.3	23.7	22.6	23.1	21.1
65+	23.6	20.6	23.2	23.7	21.1	22.6	24.3	24.5	23.0	25.8	22.7
Teens											
12-17	10.5	9.7	11.5	9.6	6.3	9.6	11.0	11.8	10.6	11.5	10.4

Source: Statistics Canada, Radio Listening, Fall 2000 (Catalogue 87F0007XPE).

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We hope you find this bulletin both informative and useful. Your views on the information and analysis contained in this issue, or previous issues, of Focus on Culture are important as they help us to meet your needs for information about culture in Canada. Please let us know how we are doing.

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Average hours per week of television viewing by province and age/sex groups, fall 2000

	Canada	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta	B.C.
Total population	**21.5**	**24.1**	**21.1**	**23.1**	**22.7**	**24.0**	**20.5**	**20.5**	**20.9**	**19.7**	**20.6**
Men											
18+	20.9	22.8	21.1	22.6	21.9	22.6	20.3	20.1	20.7	18.9	20.6
18-24	13.2	17.1	11.5	15.6	16.3	12.8	13.9	10.0	11.6	10.8	13.7
25-34	16.9	19.8	18.0	17.4	16.9	16.8	17.6	15.7	16.1	16.3	15.3
35-49	18.5	22.3	19.5	21.9	19.1	20.7	16.9	17.9	19.2	17.8	18.8
50-59	22.2	22.0	22.2	22.0	24.1	25.0	20.5	23.3	22.6	21.7	20.8
60+	32.3	30.3	30.8	32.0	31.8	35.5	31.7	31.0	30.5	28.5	31.8
Women											
18+	25.5	28.0	24.7	27.0	26.5	29.1	24.1	24.4	25.2	23.6	23.5
18-24	16.5	23.4	16.7	17.2	15.2	16.6	15.3	16.3	20.7	17.5	16.4
25-34	21.2	28.4	20.6	24.0	23.1	23.6	20.0	20.5	20.6	20.2	19.6
35-49	22.0	25.5	22.6	25.0	25.3	25.6	20.2	20.5	21.5	21.0	20.4
50-59	27.9	29.4	24.2	27.7	29.8	32.0	26.0	26.5	25.6	26.4	25.8
60+	35.8	32.7	32.1	34.9	32.4	41.2	34.8	34.0	33.9	33.4	32.4
Teens											
12-17	14.1	17.3	12.5	15.0	13.7	15.4	13.2	13.4	13.5	14.0	14.2
Children											
2-11	15.5	20.0	16.6	17.2	18.7	16.4	14.8	15.1	15.0	14.7	15.2

Source: Statistics Canada, Television Project, Fall 2000 (Catalogue 87F0006XPE).

□

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