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Exchanging notes: A new survey of music publishers

By Erika Dugas

Music publishers play a critical role in the music industry. Outside the industry, however, very little is known about music publishing and even industry insiders don't have a complete portrait of this crucial component. A new Statistics Canada survey will provide more details and clearer insight into the role played by music publishers, both within the music industry and elsewhere in the cultural sector.

When thinking about music, the radio or recordings are often the first things that come to mind; some will think about music videos or about the last time they attended a live performance at a club or festival. But music is also there in films and television programs; it's an integral part of nearly all non-print advertising; and, if you listen carefully, you can often make out a vaguely familiar tune playing faintly in the background of many offices, stores and elevators.

In fact, music is so much a part of life that we rarely think about the details. Most of us can name several popular artists but how much do we know about the songs themselves? Did somebody get paid to write the songs and how did your favourite singer end up singing that particular song? The music publisher probably played a role in both transactions.

The work

In the early 1900's, the term "music publishing" would have conjured up the image of a rhythmic press churning out sheet music. Today, print music is but a niche market in which only a few music publishers are involved. The large majority are mainly occupied with the management of copyrights in musical compositions - acquiring and registering them and promoting their use. When someone wants to use a musical work, either to record it or to use it as background, it is the music publisher who normally grants authorization.

Music publishers' revenues are dependent on their ability to have the musical works in their catalogues generate royalties. Needless to say, the more times and the more media in which a musical composition is

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used, the higher will be the royalty income generated. To increase a song's use, the publisher may market a song to a specific artist with the hope of its subsequent release on an album. Similar efforts may be undertaken to promote a song's use in film or TV[1]. Sometimes the goal is simply more airplay.

Artist development is another role increasingly taken on by the music publisher. A company may take on an unsigned artist/songwriter and work to obtain a recording label deal for him or her, thus enhancing the potential for increased royalties. Some publishers view this approach to bringing a song to market as easier than finding a well-known artist to record a work by a relatively unknown songwriter/composer[2].

The changes

Dealing with intangibles such as copyrights has always had its share of challenges but, in the past, the copyrights were normally integrally tied to tangible goods such as sheet music or records. The advent of commercial sound recording transformed the role of music publishers and the introduction of broadcasting amplified these changes.

Digitization and the Internet are changing things again. Advances in computer technology are having an enormous impact on the means by which music can be heard and appreciated. The changes are accompanied by a heightened challenge to ensure that creators are justly rewarded for the use of their products. If songwriters/composers don't receive fair compensation for their work, how will they be encouraged to continue creating? Where will the supply of new works come from? Copyright management and ensuring artist compensation are the responsibility of the music publisher.

With music publishing already little understood, the industry is becoming even more complicated and perhaps even more crucial. Few doubt that the music industry as a whole is about to undergo radical changes but there will always be a need to manage copyrights. The new survey will help to track the transformations.

The questions

This survey will provide statistics on the activities of music publishers in Canada that will assist in the development of copyright policy and provide better international trade data for the Canadian music industry. It will collect information on royalty income and payout, including the share earned by Canadian works and paid out to Canadian songwriters and composers. Publishers will be also asked what proportion of their royalties earned are from performing rights and what proportion from reproduction rights.

Music Publishers, 2000

Data will be collected on:

- employment and remuneration
- musical works - by nationality of creator
- music publishing royalty revenues received by type - performing, mechanical, other reproduction, and print rights
- net sales of print music
- royalty payments to other publishers and songwriters/composers
- royalty payments by nationality of recipient
- other sources of revenue - e.g. print music, sales of catalogues, etc.
- expenses
- international transactions - revenues and expenses

The three Canadian copyright collectives, Society of Composers, Authors and Music Publishers of Canada, Société du droit de reproduction des auteurs, compositeurs et éditeurs au Canada Inc. and the Canadian Musical Reproduction Rights Agency Ltd., were set up specifically to collect and distribute a portion of the royalty flows and some information can be garnered from their published reports. Not all payments, however, flow through these societies or agency. For example, a record company's distribution arm may pass royalty payments directly to its publishing arm or a major film producer or advertiser may approach a music publisher one-on-one for the right to use a particular song. We know these types of arrangements take place but the magnitude and international scope of the deals are relatively unknown. The survey will complete the picture.

The agreements

Copyright is very complex and the potential paths for royalty payments are many. Payments may flow from collectives to copyright holders, from music publishers to songwriters/composers, and from users of music to music publishers. The survey will trace these flows.

Another objective of this survey is to gain a better understanding of the income generated through various types of contractual arrangements.

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1 *"L'édition musicale: un métier méconnu et un maillon de la chaîne sous-développé au Québec."* Les Rencontres professionnelles de l'industrie québecoise du disque et de la radio , Février 1999: 117-124.

2 *Lanthier, Nancy (compl.) "Pop Music Publishers"* Canadian Composer, *Fall 1992:15-17.*

The standard music publishing agreement calls for the music publisher and songwriter/composer to share equally in all royalties earned plus a percentage sales of sheet music and other publications such as folios. Not surprisingly, not all agreements are standard.

A very successful songwriter/composer may not require the same level of promotional service from a music publisher as an obscure one. Alternatively, some songwriters/composers or small music publishers may handle promotion for their own works but enter into an agreement with a large publisher to provide administrative services. In some cases there may be a co-publishing agreement[3]. Acting as a sub-publisher, representing foreign publishers in Canada, is another role played by some music publishers.

Our survey will shed light on the relative importance of these agreements in the earnings structure of the sector. As well, it will provide benchmark information on the number of works in the catalogues of Canadian music publishers including the total number of works by Canadian songwriters/composers and the percentage of the total works published that are Canadian. The survey will also provide information on employment in the sector.

The questionnaire

The development of the questionnaire would not have been possible without the help of copyright collectives, the sound recording associations and a cross-section of music publishers. The groups provided assistance during questionnaire design by providing correct terminology, explanations and definitions as well as helping arrange meetings with knowledgeable individuals in specific companies.

Final preparations are underway to establish the mailing list for the survey and music publishers can expect to receive a questionnaire in the first quarter of 2001. We anticipate results in the autumn of 2002.

> The music publishing sector is very important to the music industry. If you are asked to respond to the survey, please complete the questionnaire. The results will serve the industry itself, those outsiders who are trying to understand the industry, and those individuals whose work it is to measure the Canadian economy. Let's exchange notes - let's contribute to the knowledge on Canadian music publishing.

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[3] The Canadian Independent Record Production Association, 1987. *Sound Investments : The Recording Industry in Ontario* 1987.

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Labour market outcomes of arts and culture[1] graduates

By Jacqueline Luffman

Over the last few years, we have learned a great deal about the culture labour force.[2] We know that culture workers have, on average, higher levels of education, higher rates of self-employment, lower rates of unemployment, lower wages, a greater likelihood of working part-time, and a tendency to be concentrated in certain regions of the country.

Culture organisations are increasingly concerned about their capacity to sustain the growth and vitality of their labour force. The 1990's witnessed reductions in government support programs, increases in the cost of producing cultural goods and services and a continued slackness of consumer confidence. Many medium and small cultural businesses have disappeared under the pressure of import competition and difficult economic times. These factors have an impact on the employment of creative and performing artists, on jobs and institutions in the culture sector and on access to Canadian cultural goods.

We know from the Labour Force Survey (LFS) that 578,000 individuals were working in culture industries in 1999. Of these, about 278,000 were in culture occupations.[3] The culture labour force consists of workers who are quite knowledgeable, creative, entrepreneurial, skilful and highly motivated.

[1] *See definition in text box of arts and culture graduates. The terms 'arts and culture graduates' and 'culture graduates' are used interchangeably.*

[2] *See Luffman, Jacqueline. 2000. "Culture workers increasing."* Focus on Culture. *Statistics Canada, Cat. no. 87-004-XPB, vol. 12 no. 2; Cheney, Terry. 1998. "Managing the Culture Labour Force in the 21st Century",* International Journal of Arts Management, *Volume 1, No. 1; and Ed., 1995. "The Cultural Labour Force",* Focus on Culture, *vol. 7, no. 3.*

[3] *Culture occupations consist of a list of 43 occupations classified using the 1991 Standard Occupational Classification System. Similarly, culture industries consist of a group of 13 categories classified by the North American Industrial Classification System. The occupations and industries were chosen based on the* Canadian Framework for Culture Statistics *(Culture Statistics Program, Statistics Canada) and are used by other culture labour force researchers.*

These are all skills that are in great demand in today's economy. The Cultural Labour Force Survey (1993) concluded that training and technological change are important issues for those who work in the sector and that the needs of their professional development are not always met[4]. It is critical, therefore, to monitor what happens to individuals who chose to study arts and culture and determine whether they end up finding work in their chosen fields.

There are limited sources of labour market information for recent arts and culture graduates. Human Resources Development Canada (HRDC) publishes one of the few, a job futures publication that predicts the labour market outlook for recent graduates on a three-point scale (poor, fair or good). The latest *Job Futures* publication (2000) reveals that culture graduates generally have a job outlook of "fair" into 2004. For example, there will be fewer job openings for music graduates than job seekers and only limited work available in the radio and television industry. Most would agree that many artistic and cultural occupations are highly attractive as fields of employment but their allure must be balanced against the risk of failure and an expectation of low earnings.

Several recent studies for the Ontario Culture Human Resource Council have indicated there is an impending shortage of skilled workers in the Ontario culture sector. One report[5] highlighted that many of the subsectors require knowledge of computer, business and entrepreneurial skills. Moreover, it anticipates a shortage of senior managers in both the private and non-profit cultural areas. Diminishing resources have necessitated leaner workforces and have resulted in fewer opportunities for human resource training and development. According to another report[6], in any given year, a number of graduates of culture fields of study are ready to enter the culture labour force but lack the practical experience that increases employability and earning power. As well, the transition to the culture labour force is highly dependent on one's ability to establish professional credibility and rapport with colleagues.[7] Strategies aimed at assisting young individuals to make the transition from school to work are vital for replenishing the culture labour force and addressing the apparent skill shortage.

> Arts and/or culture fields of study chosen for this study are based on the Canadian Framework for Culture Statistics. They include: fine arts, music, performing arts, dance, drama, industrial design, applied arts, advertising, commercial arts, photography, recorded music production, printing and publishing, jewellery design, fashion design, graphic and other audio-visual arts, interior decorating, mass communications, cinematography and film animation, radio and television broadcasting, English, French and other language literature, journalism, translation and interpretation, library and record sciences, archival sciences, architectural design and drafting, architecture and landscape architecture.

While a successful career in the sector may be measured a number of ways, earnings data show that most culture occupations are ranked in the bottom half (averaging less than $30,000 annually) of all types of earners in Canada.[8] It is a major challenge, therefore, for human resource managers in the culture sector to attract new talent and highly skilled individuals when the financial rewards may not be high. The culture sector must compete with other sectors of the economy for the recruitment and the retention of new graduates with specialized skills and knowledge.

The culture labour force has not been immune to the effects of the aging of the Canadian workforce. During the 1990's the age distribution of culture and other workers continued to change as the front edge of the enormous baby boom generation moved toward middle age. By the end of that decade, 5 out of 10 culture workers were between the ages of 35 and 54.[9] Not only are there fewer young people today available to enter the labour force but they are more likely to remain in the educational system longer than in previous years. These patterns reflect the demographic trends being experienced by the entire labour force in this period.

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4 *Editor, 1995.* "The Cultural Labour Force ", Ibid.

5 *Yi-Leu, Du. September 1998.* "Strategic Skills Shortages in Ontario's Cultural Sector". *Prepared for the Ontario Cultural Human Resource Council. Genovese Vanderhoof & Associates. See:* *http://www.workinculture.on.ca*

6 *Yi-Leu, Du., May 1998.* "Proposal for Effective and Efficient Training for Ontario's Cultural Industry." *Prepared for the Ontario Cultural Human Resource Council. Genovese Vanderhoof & Associates. Page 6.*

7 *Yi-Leu, Du. Ibid. Available at: http://www.workinculture.on.ca, Page 7.*

8 *Luffman, Jacqueline. 2000. "Earnings of selected culture workers: what the 1996 Census can tell us."* Focus on Culture, *vol. 12 no. 1.*

9 *Culture Statistics Program, Statistics Canada, 2000.* Canadian Culture in Perspective: A Statistical Overview, *Ottawa, Ont. Cat. no. 87-211-XPB. This proportion of workers between the ages of 35 and 54 is the same as that found in the labour force as a whole. See Statistics Canada, Labour Force Survey, Annual Averages.*

Consequently, the culture sector is concerned about who will be able to replenish their highly skilled workforce. Where are the new graduates going? What kinds of employment are they finding? Is the culture sector gaining access to a reasonable share of new graduates from post-secondary education institutions? How large is the pool of graduates?

The National Graduate Survey (NGS) sheds light on new arts and culture graduates entering the labour market.[10] In general, NGS data show that the class of 1990 had good success in the labour market in the five years after graduation. In fact, most graduates from the class of 1990 were working full-time two years after graduation and continued their labour market success into the mid-1990's. Research using the NGS[11] concludes that unemployment rates of male and female 1990 graduates at all levels of post-secondary education have been lower than those of non-graduates and improved significantly between two and five years following graduation. What was the situation for arts and culture graduates? Were they as successful in the workplace as other post-secondary school graduates and were they able to find work in their chosen professions?

Who are the culture graduates?

Of the 23,000 culture graduates in the class of 1990, about 62% graduated from a university and 38% graduated from a trade or vocational school or a college. Similar to graduates of other fields, females outnumbered males among university graduates (69%) and trade, vocational and college graduates (54%) in 1990. Two and five years after graduation, culture graduates were more likely than other graduates to be moonlighting, be self-employed, have changed employers or have found temporary work (see tables 1 and 2). Culture graduates indicated overwhelmingly that they would choose to take the same studies again given their experiences (over 70%) and agreed that their studies gave them an in-depth knowledge of their particular field and the skills needed for a job (over 90%). In addition, about 46% of culture graduates reported they had the opportunity to use and learn new technologies at their place of work.

> Statistics Canada, in partnership with Human Resources Development Canada, has conducted the National Graduate Survey since 1982. The survey was designed to obtain longitudinal data on the relationships between post-secondary education, training and labour market activities, the long-term labour market experiences of graduates, earnings and occupations and graduates' additional educational experiences and qualifications. To date the NGS databases consist of large samples of Canadian post-secondary students who successfully completed their community college or university programs in 1982, 1986, 1990 and 1995. Each cohort was interviewed two and five years after graduation in order to collect information about the educational experiences and early labour market outcomes for individuals within the group. This article examines the school-to-work transition for the 1990 arts and culture graduate cohort based on data collected in 1992 and 1995. The survey tracks job spells, changing working conditions and overall employment outcomes. Of note, however, is that the NGS did not survey many of the national arts training schools such as the National Ballet School, The National Theatre School, etc. The result is a sample of culture graduates mainly found in large universities and colleges.

Most culture graduates were working two and five years later

Of all the arts and culture graduates in 1990, 79% were working in 1992 with an increase in employment levels to 84% in 1995 (see table 2). Labour market success depends on many factors, including academic achievement, previous work experience, and the prevailing economic climate. If any of these factors are unfavourable, entry into the labour market may be difficult. The class of 1990 faced adverse economic conditions due to the recession in effect at the time of their graduation. Overall, however, graduates of all fields of study were largely successful in finding employment. Culture graduates compared favourably with the 84% of the 223,000 non-culture graduates who were working in 1992 and the 88% who were employed in 1995. While the majority of culture graduates were working in 1992 and 1995 in a variety of areas, the characteristics of that work differed from that of other types of graduates.

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[10] *Measuring culture labour markets is challenging for researchers. Definitions of the term "arts and culture" or "culture" occupations can be subjective and arbitrary. Often the available data does not match the desired area of study and use of secondary data is difficult because one is confined to using a pre-determined definition of "culture". Even so, the National Graduate Survey (NGS) provides an interesting opportunity to test the limitations of occupational and industrial mechanisms commonly used to define and capture data on culture workers.*

[11] *Finnie, Ross. 2000. "Holding their own: Employment and earnings of post-secondary graduates".* Education Quarterly Review, *Vol. 7, No. 1., p. 31. Statistics Canada, Catalogue no. 81-003.*

Table 1

Characteristics of the class of 1990, by field of study and level of study, Canada

Characteristics	University graduates		Trade, vocational and college graduates	
	Culture fields of study	All other fields of study	Culture fields of study	All other fields of study
Number of graduates	**14,337**	**122,464**	**8,490**	**100,544**
Age distribution				
19 to 29 (%)	76.1	77.1	83.5	73.3
30 to 39 (%)	13.1	15.3	11.0	18.5
40 plus (%)	10.9	7.6	5.5	8.2
Gender distribution				
Males (%)	31.3	40.4	45.9	43.9
Females (%)	68.7	59.6	54.1	56.1
Prior job experience				
% had job in culture profession prior to graduation for 6 months or more	4.2	n.r.	4.8	n.r.
% had job in culture industry prior to graduation for 6 months or more	5.5	1.6	4.4	1.5
Schedule of studies				
% full-time	70.6	73.1	91.6	90.6
% part-time	9.6	10.9	n.r.	5.3
% both	19.9	16.0	n.r.	4.2
Extent of satisfaction with program				
Program provided in-depth knowledge of subject area:				
to a great or some extent (%)	92.7	91.3	92.7	93.6
not very much or not at all (%)	7.3	8.7	7.3	6.4
Program provided skills needed for a particular job:				
to a great or some extent (%)	75.4	82.4	85.7	90.7
not very much or not at all (%)	24.6	17.6	14.3	9.3
Program provided knowledge about career opportunities:				
to a great or some extent (%)	49.9	63.5	72.5	82.2
not very much or not at all (%)	50.1	36.5	27.5	17.8
Opportunity to use and learn new technologies:				
yes (%)	45.0	44.0	47.0	45.0
no (%)	55.0	56.0	53.0	55.0
Would have selected the same field of study after experiences:				
yes (%)	71.8	73.3	74.5	74.6
no (%)	29.2	26.7	25.5	25.4
Labour force status June 1992				
Average annual personal income ($)	22,247	29,246	17,672	22,159
Median annual personal income ($)	18,000	30,000	16,000	20,000
% self-employed	7.7	5.0	9.1	3.6
% working in culture occupation	20.9	1.3	29.6	0.8
% working culture industry	21.5	4.9	31.3	4.1
Job and education relationship:				
directly related (%)	33.3	40.8	39.9	51.0
partially related (%)	52.2	51.2	39.6	37.3
indirectly related (%)	14.5	8.0	20.5	11.7
Labour force status June 1995				
Average annual personal income ($)	30,533	37,935	23,541	27,595
Median annual personal income ($)	27,000	37,000	23,000	25,000
% self-employed	13.6	8.8	14.4	6.5
% with more than one job	12.9	9.6	12.8	10.6
% working in culture occupation	11.2	1.1	14.3	n.r.
% working in culture industries	22.0	5.2	28.9	3.7
Job and education relationship:				
directly related (%)	28.4	35.3	28.6	43.1
partially related (%)	60.1	58.9	50.8	45.0
indirectly related (%)	11.6	5.8	20.6	11.9
% of graduates who went back to school between 1990 and 1992	18.3	14.3	10.5	10.8
% of graduates who went back to school between 1992 and 1995	26	25	20	20

n.a. Not available
n.r. Not reliable
***Source:** National Graduate Survey.*

Table 2

1990 culture graduates more likely to occupy temporary jobs in 1992 and 1995

Characteristics	Culture university graduates	Culture trade vocational and college graduates	All culture graduates	Other university graduates	Other trade, vocational and college graduates	All other graduates
% working in 1992	79	80	79	85	83	84
% working in 1995	84	84	84	90	86	88
% occupying temporary jobs in 1992	37	24	30	24	19	20
% occupying temporary jobs in 1995	24	17	18	17	13	14
Job Mobility between June 1992 and June 1995						
Same employer in 1992 and 1995 (%)	35	35	35	49	47	48
Same employers in 1992 and 1995 but not continuous (%)	n.r.	n.r.	n.r.	2	13	2
Different employers (%)	33	35	34	28	27	28
Not employed in 1992 but employed in 1995 (%)	14	12	14	11	11	11
Not employed in 1995 (%)	16	16	16	10	14	12

n.r. Not reliable
***Source:** National Graduate Survey*

Culture graduates more likely to hold temporary jobs than other graduates

For many graduates, 1992 was a difficult year to find permanent employment[12]. Poor labour market conditions weakened employment opportunities for all 1990 post-secondary graduates. In 1992, 37% of university culture graduates were able to find only temporary work compared to 24% of university graduates from other fields of study. Although trade, vocational and college graduates had more success at finding permanent employment, 24% of culture graduates were dependent on temporary work in contrast to 19% of their contemporaries who graduated from other fields of study.

Improvements were seen in 1995 when the overall percentage of the class of 1990 (all graduates) who occupied temporary positions dropped compared with 1992 (Table 2). However, this improvement may reflect the fact that some individuals left the labour market to return to school, rather than success at obtaining permanent employment. Close to 25% of all university graduates, including 26% from culture studies, returned to school between 1992 and 1995. College, trade and vocational arts and culture graduates were less likely to go back to school (only 20%) than university arts and culture graduates. It may be that, in the early nineties, employers found practical training more advantageous than other types of post-secondary training.

There may be a stronger relationship with permanent work when culture graduates were able to find work in the culture sector itself. For those culture graduates who did find work in the culture sector, a majority (85%) was able to obtain permanent jobs.

Income patterns different for culture graduates

The income level of workers has long been an issue of concern in the culture sector. In 1995, university culture graduates from the class of 1990 earned, on average, only $30,500 compared to the entire class of university-level graduates who earned, on average, $39,150. That same year the mean income of culture college, trade and vocational graduates was slightly less than $25,500 while all college, trade and vocational graduates earned, on

The relationship between the field of study of graduates and their current job requires the examination of two main factors: the nature of their jobs (occupation or profession) and the type of business they work for (industry). In order to do this we must pre-determine which industries or businesses are part of our definition of culture industries and which occupations or professions are culture-related. We can then use these classification tools to gather information on where arts/culture graduates worked.

[12] *A permanent job is one that is expected to last as long as the employee wants it, given that business conditions permit. That is, there is no pre-determined termination date. A temporary job has a predetermined end date, or will end as soon as a specified project is completed. (Source Guide to the Labour Force Survey, Statistics Canada, available free at http://www.statcan.ca).*

average, $29,600.[13] Not surprisingly, fine arts graduates were among the lowest earners and engineers and health science graduates were the top earners among all college and university graduates in 1995 (Table 1).[14]

Where do recent arts and culture graduates work?

Overall, the culture labour force showed high growth during the nineties. If one counts only individuals in culture occupations we see that their numbers grew at a faster rate (+23% versus +11%)[15] than the overall labour force between 1990 and 1999. In large part, this growth was due to strong increases in part-time and self-employment among culture workers. The number of jobs available in culture industries also increased by 26% over the same period.

Self-employment was generally a very strong factor in employment growth throughout the nineties, whereby it accounted for over three-quarters of job growth. Some research has shown that entering into self-employment is often the way that individuals, particularly women, respond to unemployment or the unavailability of full-time work.[16] The number of self-employed in the overall culture labour force is usually quite high (over 30% of total culture employment). Yet new graduates may find it particularly difficult to enter the labour market as a self-employed worker. This is because starting your own business requires financial resources and/or contacts in the sector that new entrants rarely have. Even so, arts and culture graduates were significantly more likely to be self-employed in both 1992 and 1995 than were other graduates.[17] About 8% of new arts and culture graduates were self-employed two years after graduation, a figure which rose to 13% by five years after graduation. In comparison, only about 4% of new graduates in other fields of study were self-employed in 1992, although this proportion rose to 8% by 1995.

According to the NGS, 1990 arts and culture graduates did not necessarily find work in the culture sector. It is notable that, despite overall growth of the culture sector in the nineties, less than half of all individuals defined as culture workers were employed in select culture industries (see Figure 1). The percentage has grown, however, from around 42% in 1990 to 48% in 1999. Labour Force Survey data show that the culture sector is a fast growing segment of the workforce. Within this cohort (i.e., the class of 1990), it is interesting to note that college, trade and vocational culture graduates who generally receive more practical, apprenticeship training, only about 29% were working in any culture industry in 1995. Similarly, only about 22% of culture university graduates were working in culture industries that year. Of the culture graduates who changed employers between 1992 and 1995, about 14% went from one culture industry in 1992 to another in 1995, while 23% moved between a culture industry and non-culture industry and the majority (62%) went from one non-

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13 *The calculations to determine these average annual earnings for culture and non-culture graduates do not distinguish between number of hours worked or temporary versus permanent.*

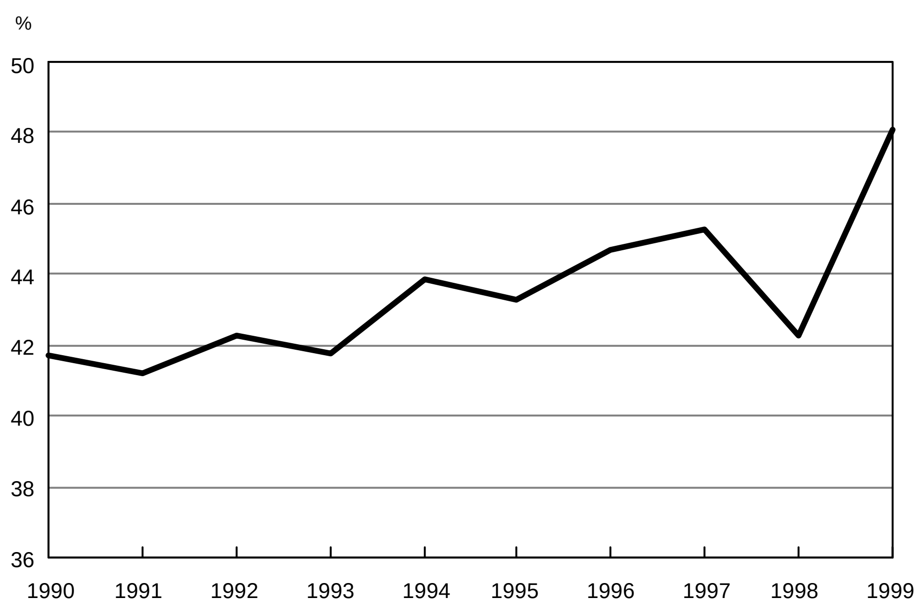
14 *Paju, Mike. 1997. "The class of '90 revisited: 1995 follow-up of 1990 graduates".* Education Quarterly Review, *Vol. 4, No. 4.*

15 *Luffman, 2000. Ibid.*

16 *Lin, Yates and Picot, 1998.* "The Entry and Exit Dynamics of Self-Employment in Canada." *Business and Labour Market Analysis Division, Statistics Canada.*

17 *A chi square test was performed to determine the strength of the association between self-employment and field of study (i.e. culture versus non-culture fields of study). In both 1992 and 1995, the chi square test showed that the difference in proportions is significant ($X^2=471$, $p<.001$ and $X^2=760$, $p<.001$).*

Figure 1
Fewer than half of all culture workers were employed in culture industries between 1990 and 1999



Source: Labour Force Survey, Annual Averages.

culture industry to another. It is important to keep in mind that the labour force experiences of this cohort may be different than the experiences of other graduate classes. Moreover, we cannot determine if these culture graduates are volunteering or have secondary jobs in the culture sector.[18]

Strength of ties to employers

There is a notable difference in the length of time graduates stayed with employers during their initial five years after graduation. While almost half (49%) of non-culture university graduates kept the same employer through five years after graduation (Table 1) only 35% of culture university graduates stayed with the same employer over the same period. Almost exactly the same pattern and percentages can be seen for graduates of trade, vocational and college studies.

Weak link between studies and employment

Survey respondents were also asked how closely their current job related to their studies. In 1992 and 1995, culture graduates were less likely to respond that they were directly related than did graduates of other programs. About 33% of university culture graduates indicated their job was directly related, compared with 41% for other graduates. Similarly, 40% of trade, vocational and college culture graduates indicated their job was directly related to their training, compared with 51% for other graduates. The relationship between education and current employment also appears to have weakened by 1995. That year, fewer than 30% of culture graduates responded that their job was directly related to their studies.

Overall, these results demonstrate that the majority of recent graduates of arts and culture programs did not find work in their chosen field. This is confirmed by data from the Labour Force Survey that, throughout the nineties, less than half the individuals in culture occupations could be found in select culture industries. Instead, they appear to have obtained employment in other industries that may have valued their education and skills more. This issue should have significance for those who are concerned about the future health and vitality of the Canadian culture sector and the ability of young culture graduates to work in their chosen fields.

> The Culture Statistics Program would appreciate any comments, feedback or suggestions for further research on culture graduates. Please direct your comments to Mary Cromie at the Culture Statistics Program.

Jacqueline Luffman *is a research analyst in the research and communications section of the Culture Statistics Program.*

[18] The NGS only collected information on an individual's primary job. While the survey reports if the graduate had other jobs in addition to their main paid employment one cannot determine what or where the secondary job(s) were.

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Working together: An update on the National Advisory Committee on Culture Statistics

By Bradford Ruth

As with many other areas in Statistics Canada, the Culture Statistics Program (CSP) benefits from the informed advice of an external advisory committee. The National Advisory Committee on Culture Statistics (NACCS) was created in 1984 with a mandate to provide advice for the development of statistical activities related to all aspects of art and culture in Canada. Committee members represent a range of constituencies, and their two-year terms are staggered to provide continuity.

The most recent meeting of the NACCS was held in Ottawa on 30 October 2000. The agenda for the meeting included four themes: data release strategies, data gaps, survey priorities and dissemination strategies. Prior to the meeting the Chairperson and the committee members, in conjunction with CSP staff, put together a number of discussion points around these four themes. The points were intended to focus discussion and to encourage follow-up.

Members wanted to explore the possibility of publishing preliminary estimates for a limited number of data points at a much earlier period in the survey process. This would ensure a more timely release of data that could then be followed, at a later date, by revised and more complete results.

The committee offered direction to Statistics Canada on the issue of data gaps and a program to collect this missing information. To generate discussion, members identified a short list of possible gaps such as new media, visual arts, libraries, international trade and provincial statistics. The issue of provincial data was a sensitive topic, specifically the lack of detailed culture data at the provincial level. It was agreed that a system for generating timely, reliable, and affordable provincial statistics must be developed quickly in consultation with the community. If such a system is not created soon, provinces will look for other sources for their culture data. The timing is right to create a uniform system of culture statistics. Such a system would allow users to analyze activity within their own province/territory and make reliable comparisons across jurisdictions. Dick Stanley from the Department of Canadian Heritage will chair a sub-committee that will proceed on this issue.

On the theme of survey priorities, members wanted to focus their discussion on survey frequency. Should particular surveys be done more or less frequently, and what criteria should be used to make these decisions? Volatility in particular subsectors might be one criterion, but are there others that should be considered?

Finally, in the case of dissemination strategies, the committee expressed the desire that the CSP work with the Department of Canadian Heritage and representatives from the culture sector to bring culture statistics and related information together as a "portal" for Canadian cultural information on the Internet. Furthermore, committee members wanted to determine which data products should be widely available, how they could be made available, and who would finance them.

The format was markedly changed for this NACCS meeting. Previously, the committee met with all CSP staff present for the full day. For this meeting, NACCS members met *in camera* in the morning to develop consensus on a number of issues and recommendations. The afternoon was reserved for a feedback session whereby the NACCS presented its preliminary observations and recommendations to Statistics Canada senior staff and CSP staff. At the close of the meeting, the Chairperson agreed to provide a follow-up written report to Statistics Canada detailing the committee's advice and recommendations. Look for a detailed update from Andrew Terris, the Chairperson, in an upcoming edition of *Focus on Culture*.

The current committee members are:

(Chair) Andrew Terris, Nova Scotia Cultural Network, Halifax
Guy de Repentigny, Téléfilm Canada, Montreal
Brenda Gainer, Schulich School of Business, York University, Toronto
Dan Johnson, Humewood Communications Corporation, Toronto
Ralph Manning, National Library of Canada, Ottawa
Claire McCaughey, The Canada Council, Ottawa
Clive Padfield, Alberta Community Development, Edmonton
Dick Stanley, Department of Canadian Heritage, Hull
Megan Williams, Canadian Conference of the Arts, Ottawa
Bradford Ruth, Statistics Canada, Ottawa

For more information on this important committee please contact Bradford Ruth, Assistant Director, Culture Statistics Program by telephone at 613-951-6433, by fax at 613-951-9040 or through e-mail at brad.ruth@statcan.ca.

***Bradford Ruth** is Assistant Director of the Culture Statistics Program.*

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Release dates for data from culture statistics program surveys

Surveys	Reference year 1994-95	Reference year 1995-96	Reference year 1996-97	Reference year 1997-98	Reference year 1998-99	Reference year 1999-2000
Sound Recording						
• Record Companies	no survey	May 5, 1998	**no survey**	April 2001	**no survey**	3rd quarter 2002
• Music Publishing	**no survey**	**no survey**	**no survey**	**no survey**	December 2001	no survey
Motion Picture Theatres	July 10, 1996	September 29, 1997	August 24, 1998	August 24, 1999	October 16, 2000	August 2001
Film and Video Distributors	July 29, 1996	**no survey**	**no survey**	February 3, 2000	1 December 2000	September 2001
Film and Video Production	October 30, 1996	March 27, 1998	December 1, 1998	April 3, 2000	March 2001	November 2001
Laboratory and Post-Production Services	November 26, 1996	March 27, 1998	December 1, 1998	April 3, 2000	March 2001	November 2001
Government Expenditures	August 12, 1996	September 25, 1997	September 24, 1998	October 13, 1999	January 25, 2001	October 2001
Book Publishing	May 7, 1997	**no survey**	July 9, 1998	**no survey**	July 26, 2000	May 2002
Periodical Publishing	September 6, 1996	**no survey**	September 14, 1998	**no survey**	April 2001	To be confirmed
Television Viewing	August 23, 1995	July 25, 1996	February 5, 1998	January 29, 1999	December 24, 1999	January 25, 2001
Radio Listening	August 23, 1995	January 30, 1997	February 5, 1998	September 8, 1998	July 22, 1999	July 26, 2000
Performing Arts	January 16, 1997	**no survey**	March 4, 1999	**no survey**	March 6, 2001	no survey
Heritage Institutions	no survey	March 9, 1998	**no survey**	March 30, 2000	**no survey**	November 2001

Comings and goings

Mary Cromie has left her position as Editor, *Focus on Culture*, to take on new challenges. We are grateful for the skill, dedication and good humour Mary has shown since she began at *Focus* in 1994. Mary's new position in the CSP is Unit Head, Marketing and Communications. Included in her responsibilities are the development of generic culture performance indicators for use in monitoring the health and vitality of the culture sector, especially at the provincial level.

We welcome Marla Waltman Daschko as the new Editor of *Focus on Culture*. Marla, previously Manager of policy, research and communications at the National Literacy Secretariat, is on a one-year assignment from HRDC. She brings enthusiasm to the job as well as broad experience in cultural policy and program development gained through various positions at the Department of Communications (now the Department of Canadian Heritage) and the National Archives of Canada.

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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 and territorial culture data in front of our users, we are presenting selected data in each issue of *Focus on Culture*. This time, we have chosen to include recently released data on movie theatres and drive-ins and government expenditures on culture.

Table 2

Per capita government expenditures on culture, 1996-97 to 1998-99

	Federal			Provincial/territorial			Municipal[1]		
	1996-97	1997-98	1998-99	1996-97	1997-98	1998-99	1996-97	1997-98	1998-99
Canada	**93**	**89**	**93**[2]	**59**	**58**	**62**	**48**	**49**	**45**
Newfoundland	79	70	74	71	82	66	22	20	20
Prince Edward Island	99	111	123	74	78	74	9	12	11
Nova Scotia	91	95	99	58	63	72	34	32	34
New Brunswick	62	58	65	46	55	52	25	26	25
Quebec	114	113	126	79	78	89	33	38	30
Ontario	102	100	98	39	40	43	54	53	47
Manitoba	57	54	59	73	75	75	43	52	46
Saskatchewan	40	34	43	63	63	68	51	57	60
Alberta	52	45	45	47	44	45	48	48	52
British Columbia	38	33	38	71	67	71	77	74	69
Yukon	416	397	467	583	367	347	74	114	17
Northwest Territories	571	434	457	129	122	146	38	34	25

1 *Municipal spending is on a calendar-year basis.*
2 *Also includes unallocated expenditures.*
Source: Survey of Government Expenditures on Culture, 1996-97 to 1998-99

Table 1

Residents of Alberta and British Columbia were Canada's most avid moviegoers in 1998-99

	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta	B.C.	Y.T. and N.W.T.	Canada
Number of theatres[1]	12	5	22	18	137	209	37	46	89	112	5	692
Paid admissions ('000)	909	479	2,681	1,970	27,225	41,289	3,904	3,459	14,413	16,167	295	112,792
Average attendance per capita	1.67	3.50	2.86	2.62	3.72	3.63	3.43	3.37	4.96	4.04	2.98	3.73
Number of screens	23	13	74	50	649	877	78	110	344	347	9	2,574
Revenue ($'000)	7,027	3,628	20,887	14,596	192,186	326,032	24,829	22,436	108,531	134,493	2,365	857,011
Expenditures ($'000)	5,788	2,909	19,187	12,948	180,159	300,393	22,809	19,151	94,059	121,700	2,217	781,321
Salaries and benefits ($'000)	1,203	502	3,566	2,263	30,612	49,386	3,506	3,472	14,224	22,464	418	131,616
Profit margin (% of revenue)	17.6	19.8	8.1	11.3	6.3	7.9	8.1	14.6	13.3	9.5	6.3	8.8

1 *Includes both movie theatres and drive-ins.*
Source: Motion Picture Theatres Survey, 1998-99

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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 help to ensure that we meet your needs for information on culture in Canada. Please let us know how we are doing. Your comments may be addressed to:

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