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Market opportunities: International trade of culture goods and services

By Cindy Carter and Michel Durand

Canada's 2001 Speech from the Throne outlined the significance of the nation's culture in an increasingly globalized world. It recognized that the opening of new markets provides new outlets for Canadian cultural commodities and services. Accordingly, the government has made a commitment to advance Canadian culture by providing Canadians and international audiences with enhanced access to Canadian-made culture goods and services. Key industry players believe that globalization provides opportunities for Canadians to increase culture exports, particularly in those niche markets where Canada is known to be competitive. As the domestic market is small, the growth of international trade is fundamental if Canadian companies are to compete over the long term. Government policy works to ensure that Canadian culture goods and services, which reflect a community with ancestral roots in almost every country in the world, will also appeal to a growing international audience.

While culture goods and services are highly marketable commodities, the globalization of culture also accentuates Canada's traditional concerns about foreign content and foreign control of the domestic marketplace. Just as expanded international trade opens new markets for Canadian goods, it increases our exposure to the culture wares of other countries. Consequently, the focus of new cultural policies, as found in the Speech from the Throne, is on excellence in the creative process, the creation of diverse Canadian content and improved access to the arts and heritage for all Canadians. Canadian creators (artists, writers, and performers) are called upon to promote Canadian creativity across all media.

The international context for trade in cultural goods

According to the United Nations Educational, Scientific and Cultural Organisation (UNESCO) Institute for Statistics, world trade in cultural goods rose from $47.8 billion (U.S.) in 1980 to $213.7 billion (U.S.) in 1998 (from $12 per capita in 1980 to $45 in 1997).[1] In 1998, culture goods exports exceeded imports in developing

[1] *UNESCO Institute for Statistics,* International Flows of Selected Cultural Goods, 1980-98: Executive Summary, p. 4.

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countries, whereas in the developed countries[2], the reverse was true.

According to UNESCO, in 1998, global flows of trade in cultural goods were concentrated between relatively few countries with trade that was "unbalanced, heavily weighted in one direction with few producers and many buyers."[3] While the balance of trade in cultural goods (i.e. the difference in value between imports and exports) was relatively even for most countries, trade surpluses or deficits were sizeable for a number of very active trading nations. The main net exporters (countries with the most significant trade surpluses) were Japan, China, Malaysia, Mexico, Ireland and the Republic of Korea. The main net importers (significant trade deficits) of cultural goods were the United States, Hong Kong, Canada, Australia, Belgium and the Netherlands. In 1998, thirteen countries, including Canada, were responsible for more than four-fifths of imports and twelve countries accounted for the same proportion of exports.[4] It is within this context that Canada is working to expand the size and types of its culture exports and gain access to new markets.

Opportunities can be found in foreign markets

A significant number of Canadian artists are now capturing the attention of consumers from Canada and around the world. This has helped to forge an identifiable image for Canada,

[2] *Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Israel, Italy, Japan, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, the United Kingdom and the United States.*
[3] *Ibid., UNESCO, p.3.*
[4] *Ibid., UNESCO, p. 8.*

Measuring Canada's culture net trade position

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.

Culture commodities

Culture commodities (or goods) are defined as the main physical outputs of the industries and activities listed below. Exports and imports of this type must physically cross borders.

- Books and printing services
- Newspapers and periodicals
- Other written material
- Music and other recordings
- Printed music
- Visual arts
- Architectural plans
- Other pictorial material
- Advertising material
- Exposed film

Culture services

Culture services need not be tangible goods but rather are services performed. Monetary transfers measure importation and exports of services. Included are:

- Guest artist fees
- Book sales from abroad
- Film and video production and post-production and laboratory services
- Editorial services
- Platemaking, typesetting and binding
- Design/layout/illustration services
- Library services
- Art and photograph restoration services
- Architectural services
- Photograph developing and other lab services
- Advertising services
- Arts and cultural educational services
- Talent agent, promoters, booking agent services
- Scenery/set design, prop warehouse services
- Copyright collective services
- Professional culture association services
- Culture spending by tourists

Cultural Intellectual Property (IP)

Transactions in cultural products also include intellectual property products, which are an intangible good to which ownership rights apply, and payments are paid for the use or redistribution of the product. Cultural intellectual property is defined through monetary transactions related to royalties, licensing fees and subsidiary rights derived from the sale of culture goods.

a sense of what we stand for, and an appreciation of our culture. The recent international success enjoyed by the culture sector can be attributed to a number of factors: maturing cultural industries, exceptional performances by creative and performing artists, increased marketing and promotion efforts, growing private and public sector partnerships and, generally, a dynamic international trade environment. The result is that, over the past ten years or so, the Canadian cultural sector, in particular the film and video production sector, has finally been able to make substantial inroads into foreign markets.

The domestic market for culture production is small and segmented; increased penetration of foreign markets is critical if the Canadian sector is to become more viable. In fact, the development of niche markets is one approach that has been successful for other trading partners and some Canadian companies have worked to replicate the approach. Tens of thousands of jobs (an estimated 5% to 10% of culture jobs) are sustained by exporting activities. The sectors most influenced by export-based employment in 1997-98 were the film and video production sector (38% of all jobs) and post-production and laboratory services (41% of all jobs)[5].

The North American Free Trade Agreement (NAFTA), the European Union (EU) and the alliance of Asian countries offer new outlets for Canadian cultural products and services. Exports, which are assuming an increasing share of Gross Domestic Product (GDP), now appear to be the major engine of growth for the culture sector. In effect, the value of exported culture commodities, services and intellectual property reached approximately $4.5 billion in 2000. This represents a 38.4% increase over 1996 (table 1).[6]

United States still our biggest export market

While Canada trades with virtually all countries, certain markets have proven to be more welcoming than others for the culture sector. The United States overwhelmingly continues to be our most important export market for all cultural products and services. In fact, according to UNESCO, the United States is the number one importer of culture goods[7] in the world.

In 2000, the North American region captured a whopping 94% of Canada's culture commodity exports (a value of $2.22 billion), a 9.4% increase in

5 *Statistics Canada. The Film, Video and Audio-visual Survey, 1997-98 and the Survey of Laboratory and Post-Production Services, 1997-98.*
6 *Year after year, substantial increases in our exports have been reported, but it is only by adding up the figures for every cultural sector that the routine yearly announcements reveal the economic phenomenon that lies behind them.*
7 *Ibid., UNESCO, p. 6.*

Table 1

Exports of culture commodities and services increasing faster than imports but Canada still has a trade deficit

Culture net trade position	1996	1997	1998	1999	2000	% change: 1996 to 2000
			millions (current $)			
Exports						
Commodities	1,597	1,588	1,857	2,129	2,353	47.3
Culture services and IP	1,636	1,916	1,884	2,009	2,120	29.6
Total exports	**3,233**	**3,503**	**3,741**	**4,139**	**4,473**	**38.4**
Imports						
Commodities	4,091	4,626	4,455	4,718	4,794	17.2
Culture services and IP	2,042	2,083	2,514	2,681	2,729	33.6
Total imports	**6,133**	**6,709**	**6,969**	**7,399**	**7,523**	**22.7**
Net trade position						
Commodities	-2,494	-3,038	-2,598	-2,589	-2,441	-2.1
Culture services and IP	-406	-168	-630	-672	-609	50.0
Total net trade position	**-2,900**	**-3,206**	**-3,228**	**-3,261**	**-3,050**	**5.2**
Trade ratios						
Import / Export	1.90:1	1.92:1	1.86:1	1.79:1	1.68:1	-11.3
Export / Import	0.53:1	0.52:1	0.54:1	0.56:1	0.59:1	12.8

Note: Totals may not add due to rounding
Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics Division.

market share over 1996[8] (table 2a). The value of exports to the North American market (overwhelmingly to the U.S.A.) increased by 61% between 1996 and 2000 (table 2b).

Canadian culture commodity exports to the Western Europe region held the second highest market share next to North America from 1996 to 2000. However, during the same period, there was a 45% decline in the value of exports to the traditional Western European market; whereby the value of exports to the United Kingdom, France, and Germany dropped 2%, 51%, and 65% respectively. Exports may have declined, in part, due to increased internal trade within the European Union. Excluding North America, the value of trade in the remaining regions has declined with the exception of the Middle East where the value of Canadian exports increased by over 5% between 1996 and 2000 (table 2b).

Markets in the 'Other Asia'[9] region offer opportunities for Canadians that, as yet, have not reached their potential. Canadians had anticipated growth in trade with this region but many of these markets were affected negatively by the Asian economic crisis in 1997-98. In 2000, Canada saw improvements with exports reaching 90% of pre-crisis levels, in terms of value, for all commodities.

Given its current performance in commodity markets other than the United States (e.g., Central America, Oceania and the Middle East[10]), it would appear that there is scope for Canadian exporters to make important gains in market access negotiations in these regions. Aggressive trade promotion, more effective on-the-spot representation, and competitive financing will undoubtedly be part of a concerted marketing effort by Canadians.

Canada one of world's greatest importers of culture products

Multinationals have emerged as the dominant players in the culture industries in Canada. The reasons are simple. These foreign subsidiaries tend to market imported goods that have often already recovered their costs in their home markets. Furthermore, the revenues from the distribution of these products do not accrue to the Canadian companies that are the most likely to help finance the

8 This figure is based on commodity exports only (excluding services and intellectual property).

9 Other Asia includes the East Asian countries as well as Afghanistan, Bangladesh, Bhutan, Brunei Darussalam, Cambodia, India, North Korea, Laos P. Democratic Republic, Macau, Maldives, Myanmar, Nepal, Pakistan, Sri Lanka, Vietnam (Source: Statistics Canada's 1997 classification of countries).

10 See tables 2a and b, Exports by region.

Table 2a

United States received largest and growing share of Canadian culture commodity exports between 1996 and 2000

Trade regions	1996	1997	1998	1999	2000	% change 1996 to 2000
				Trade share (%)		
North America						
- United States	86.2	89.2	92.4	93.6	94.3	9.4
- Other North America	0.0	0.0	0.0	0.0	0.0	
Sub-total - North America	**86.2**	**89.2**	**92.4**	**93.6**	**94.3**	**9.4**
Western Europe						
- United Kingdom	2.1	2.2	1.3	1.3	1.4	-33.5
- France	1.5	1.1	0.9	1.0	0.5	-66.5
- Germany	1.7	0.8	0.6	0.4	0.4	-76.5
- Other Western Europe	3.4	1.9	1.6	1.0	1.0	-71.5
Sub-total - Western Europe	**8.7**	**6.0**	**4.5**	**3.8**	**3.3**	**-62.4**
Middle East	0.3	0.2	0.2	0.2	0.2	-28.4
Other Asia	2.0	1.9	1.7	1.6	1.3	-37.7
Oceania	0.6	0.7	0.3	0.2	0.3	-53.9
South America	0.4	0.4	0.2	0.1	0.1	-77.3
Other regions[1]	1.7	1.5	0.7	0.5	0.5	-70.0
Sub-total- Other Countries	**5.0**	**4.8**	**3.1**	**2.7**	**2.4**	**-53.0**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	

1 Other regions include Other Europe, Other Africa and Central America & Antilles.
Note: Totals may not add due to rounding
Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics Division.

Table 2b

Canadian culture commodity exports to Western Europe had second highest earnings next to North America from 1996 to 2000

Trade regions	1996	1997	1998	1999	2000	% change 1996 to 2000
			millions (current $)			
North America						
- United States	1,377	1,417	1,715	1,992	2,220	61.3
- Other North America	0.2	0.1	0.1	0.0	0.0	
Sub-total - North America	**1,377**	**1,417**	**1,715**	**1,992**	**2,220**	**61.3**
Western Europe						
- United Kingdom	34	34	25	29	33	-2.1
- France	24	18	17	22	12	-50.6
- Germany	27	13	12	8	9	-65.4
- Other Western Europe	54	30	30	22	23	-58.0
Sub-total - Western Europe	**140**	**95**	**84**	**81**	**77**	**-44.7**
Middle East	5	3	4	5	5	5.4
Other Asia	32	31	32	34	30	-8.3
Oceania	10	12	5	5	7	-32.1
South America	6	7	3	2	2	-66.5
Other regions[1]	28	24	13	11	12	-55.8
Sub-total - Other Countries	**81**	**76**	**58**	**57**	**56**	**-30.7**
Total	**1,597**	**1,588**	**1,857**	**2,129**	**2,353**	**47.3**

1 Other regions include Other Europe, Other Africa and Central America & Antilles.
Note: Totals may not add due to rounding
Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics Division.

development of domestic talent. These multinationals enjoy natural advantages of scale in serving a North American market. Little or no risk is involved in distributing their popular, "mass-appeal" U.S. films, books, and recordings in Canada. Our bookstores, news stands, record shops, cinemas and television screens testify to Canada's position as one of the greatest importers and consumers of cultural products in the world. Canadians enjoy wide access to other cultures through imported products; in part, the multicultural composition and heritage of our population feed this interest.

Foreign multinationals are not the only ones involved in distributing imported culture products to Canada. Given the small size of the main markets in Canada it is extremely difficult to develop, produce and distribute Canadian products at a profit. This is particularly true for the production of French-language products for the small domestic market. The result is that Canadian companies, which finance the overwhelming majority of the "less profitable" Canadian cultural products, do not usually become self-financing by dealing in Canadian products alone. Financial solvency often comes from the licensing and distribution of imported products for sale in Canada. In 1996-97 the importation of culture products by Canadian-controlled firms accounted for 57% of their record sales, 44% of their book sales, and 69% of their film and video distribution revenue, an indication of the role and contribution of imports even for Canadian-controlled companies.[11]

As both Canadian and foreign players are competing for the higher profit margins associated with the distribution of imported cultural products, it is not surprising that the market share of local productions is eroding somewhat. The continued demand for imports are making the culture economy, in particular indigenous culture development, a very fragile, volatile and highly competitive sector. For example, Canadian theatrical films represented only 2.1% of revenues of theatrical films distributed in 1997-98 while Canadian home entertainment films (TV and PAY-TV) accounted for 12.4% of total revenue from this activity in the same year. However, on the positive front, imports of culture goods and services support an estimated 300,000 to 400,000 jobs in Canada, and Canadian companies get a sizeable piece of this importing activity.

11 Data obtained from three Statistics Canada Culture Statistics Program surveys, 1997-98: Sound Recording Survey: Record Companies, Survey of Book Publishers and Exclusive Agents; and Survey of Film, Video and Audio-Visual Distribution.

But growth in demand for imports slowing down

The total value of imported culture commodities, services and intellectual property, reached over $7.5 billion in 2000, representing a 22.7% increase over 1996 (table 1). Much of this growth is attributable to consumer demand in Canada. Between 1996 and 1998, Canadian expenditures on domestic and imported culture goods and services increased by 14.6%, an average of 6.1% annually (table 3).[12] This growth was greater than the 10.5% growth of expenditures on all goods and services in the same time period. Overall, however, culture expenditures, which are still a relatively small proportion of total expenditures by Canadians on goods and services, hover around 3% each year.[13]

Current trends in demand for imported culture commodities demonstrate that growth is slowing down. While there was a 13.1% increase in culture imports between 1996 and 1997, subsequent years have shown much slower growth: -3.7%, 5.9% and 1.6% respectively between 1997 and 2000 (table 4). It is difficult to predict the effects of domestic consumption of culture on import levels. Many economic and socio-economic factors have the potential of affecting domestic consumption patterns and consequently influence the quantity of goods and services that are imported. Consumer demand for cultural commodities is often fairly price elastic so that the effects of price, consumer debt, personal income, as well as demographics, may have an effect on demand for culture products generally, imported or domestically produced.

United States is our biggest source of imports

The United States continues to be our most popular source of imports for all cultural products, counting for 83% of our culture commodity imports in 2000.[14] The value of commodity imports from the U.S.A. reached over $3.9 billion in 2000 (table 5a). This is

[12] *See table 3. Statistics Canada, Survey of Household Spending, 1998. Total expenditures on culture are calculated as the proportion spent on culture from the Survey of Household Expenditures multiplied by Provincial Expenditure Accounts (PEA) totals.*

[13] *Ibid. Spending on culture products and services, as a proportion of spending on all goods and services, had only minor annual increases from 2.93% in 1996 to 3.03% in 1998.*

[14] *Based on commodity exports only (excluding services and intellectual property).*

Table 3

Expenditures on culture events and activities growing faster than growth of all consumer goods and services, 1996 to 1998

Total expenditure	1996	1997	1998	% Change: 1996 to 1998
		millions (current $)		
Culture goods, events and activities[1]	14,110	15,134	16,174	14.6
All consumer goods and services[2]	482,367	512,454	532,926	10.5
Culture goods, events and activities expenditures as % of all consumer goods and services	2.93	2.95	3.03	

[1] *Amount includes only expenditures on culture goods, services (events and activities), and excludes culture equipment.*
[2] *Excludes personal taxes.*
Source: Statistics Canada, Survey of Family Expenditures (FAMEX) 1992, 1996; and Survey of Household Spending 1997, 1998.

Table 4

For culture commodities, growth of exports exceeds growth of imports, 1996 to 2000

		1996	1997	1998	1999	2000	% Change: 1996 to 2000
Total imports of culture commodities	millions (current $)	$4,091	$4,626	$4,455	$4,718	$4,794	17.2%
Annual growth		13.1%	-3.7%	5.9%	1.6%		
Total exports of culture commodities	millions (current $)	$1,597	$1,588	$1,857	$2,129	$2,353	47.3%
Annual growth		-0.6%	16.9%	14.6%	10.5%		

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

the result of a combination of influences including proximity, the growth of multinational corporations and, like many other countries, Canadians' avid interest in American culture products such as books, movies and music.

While the value of the North America region imports of culture commodities increased by over 13.2% from 1996 to 2000, its market share of total imported culture products in Canada fell by 3.4%, indicating that other countries are making some inroads into Canada (table 5b). Imports to Canada from the 'Other Asia' trade region grew almost 85% in value from 1996 to 2000, with its share of total trade also rising 2.3% during this time period, maintaining its position as the third ranked import region. Western Europe retained its position as the second ranked import region throughout; the value of imports grew 20.7% from 1996 to 2000, representing a 3% increase in the share of total imports.

Table 5a

Value of culture commodity imports growing, 1996 to 2000

Trade regions	1996	1997	1998	1999	2000	% change 1996 to 2000
			millions (current $)			
North America						
- United States	3,498	3,955	3,750	3,934	3,939	12.6
- Other North America	10	12	17	21	31	202.7
Sub-total - North America	**3,508**	**3,967**	**3,768**	**3,955**	**3,970**	**13.2**
Western Europe						
- United Kingdom	121	154	156	157	171	41.0
- France	135	151	162	169	173	27.6
- Germany	34	27	35	35	38	12.6
- Other Western Europe	102	89	89	104	92	-9.8
Sub-total - Western Europe	**392**	**421**	**442**	**466**	**473**	**20.7**
Other Asia	166	207	214	261	307	84.7
Other regions[1]	25	31	31	36	44	74.1
Total	**4,091**	**4,626**	**4,455**	**4,718**	**4,794**	**17.2**

[1] Other regions include Other Europe, Middle East, Other Africa, South America and Central America & Antilles.
Note: Totals may not add due to rounding
Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics Division.

Table 5b

The United States is our biggest source of culture commodity imports with Western Europe a distant second

Trade regions	1996	1997	1998	1999	2000	% change 1996 to 2000
				Share (%)		
North America						
- United States	85.5	85.5	84.2	83.4	82.2	-3.9
- Other North America	0.2	0.3	0.4	0.4	0.6	158.3
Sub-total - North America	**85.7**	**85.8**	**84.6**	**83.8**	**82.8**	**-3.4**
Western Europe						
- United Kingdom	3.0	3.3	3.5	3.3	3.6	20.3
- France	3.3	3.3	3.6	3.6	3.6	8.9
- Germany	0.8	0.6	0.8	0.8	0.8	-3.9
- Other Western Europe	2.5	1.9	2.0	2.2	1.9	-23.0
Sub-total - Western Europe	**9.6**	**9.1**	**9.9**	**9.9**	**9.9**	**3.0**
Other Asia	4.1	4.5	4.8	5.5	6.4	57.6
Other regions[1]	0.6	0.7	0.7	0.8	0.9	48.5
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	

[1] Other regions include Other Europe, Middle East, Other Africa, South America and Central America & Antilles.
Source: Statistics Canada, Culture, Tourism and the Centre for Education Statistics Division.

Commodity trade contribution to culture transactions

Statistics Canada disseminates monthly data on merchandise trade approximately fifty days after the reference period, making it one of the more timely trade data sources available. Culture commodity trade activities account for only about half of all culture international transactions; monetary transactions associated with culture services and intellectual property account for the rest. Still, it is useful to examine the latest trends in importing and exporting activities of culture commodities.

In general, culture commodity exports are growing faster than imports, although the growth rate for both has slowed during the latter half of the 1990's. Comparing 1996 and 2000, culture commodity exports grew by 47.3% compared to 17.2% for imports.

The trend of larger export growth rates vis à vis import growth rates is readily apparent during the last three years with growth in exports hitting double digits compared to the single digit growth in imports (table 4).

In 2000 the greatest value of culture commodity exports was derived from music, other recordings and software (22%), followed by advertising material (20%) and books and printing services (17%). These three commodity groups together accounted for nearly 60 percent of the value of culture exports in 2000. On the other hand, around 80 percent of Canadian cultural imports that year were allocated among books and printing services (30%); music, other recordings and software (27%); and; newspapers and periodicals (22%).

Canada's net culture trade position improving

Canada still faces a large trade deficit in terms of culture goods and services; the value of imported culture goods and services surpassed the money earned by exports by $3.05 billion in 2000. This picture is moderated, however, by positive changes to rates of export and import. Exports are showing annual increases greater than the rate of inflation and the value of imports is not growing as quickly. This strong export performance decreased the import to export ratio from 1.90:1 to 1.68:1 over the same period (table 1).

Conclusion

As we move further into the new decade, factors such as free trade and the growing world market for culture products and services will lend new force to the question of who we are as Canadians. The existence of Canadian culture institutions and industries, with the ability to produce compelling and competitive products and services, will ensure that Canadians continue to share in the growing world trade in culture.

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Changing times for heritage institutions

By Fidel Ifedi

As we head into the new millennium, heritage institutions look for ways to adapt to a rapidly changing operating environment. Over the past decade, heritage institutions have seen reductions in government funding and they increasingly find themselves competing with other players in the entertainment-sector for audiences and discretionary dollars. Technology has taken on an increasingly significant role as Canadians bring the Internet into their homes and, at heritage institutions, they participate in simulated environments and interactive exhibits. These developments mean that heritage institutions must both adapt to the changes in the environment and continue to meet the traditional challenges of acquiring and preserving collections.

The Survey of Heritage Institutions:

Unless otherwise noted, the findings in this article are drawn from the Survey of Heritage Institutions. This survey covers non-profit institutions, be they museums, archives, historic sites, aquariums, observatories, zoos, planetariums or exhibition centres. Excluded are nature parks, conservation areas and commercial art galleries.

Museums include community museums, art museums, history museums (whose primary role concerns human history, natural history and science, military and forts, transportation, sports or halls of fame) and other museums (for example, multidisciplinary or science and technology).

Historic sites include historic buildings, parks and communities.

In some tables, there is a catch-all category, o*ther types of institutions*, that includes exhibition centres, planetariums, observatories, zoos, botanical gardens, arboretums and conservatories. In tables 1 and 4 aquariums are also included in this category.

Results for the Survey of Heritage Institutions refer to a twelve-month period, from April of one year to March of the following year.

A favourite pastime

Visits to heritage institutions remain a favourite pastime in Canada. According to the biennial Survey of Heritage Institutions, overall attendance totalled almost 54 million visits in 1997-98 (table 1a), with museums (26 million visits) and historic sites (16 million visits) being the most popular. Another source, the General Social Survey (GSS)[1], found that around a third of Canadians, 15 years of age and older, visited a heritage institution in 1998.

At the national level, historic sites, zoos, aquariums, botanical gardens and planetariums attracted the most Canadians (32%) to their doors (table 2). Looking across the country, Canadians had varying levels of interest in heritage institutions with attendance rates ranging from a low of 21% in Newfoundland to a high of 36% in Nova Scotia and British Columbia[2]. Overall, Nova Scotians had the highest rate of visiting historic sites (49%) and, tied with British Columbia for visits to museums of every type (36%). Manitoba and Alberta led the country (39%) in visits to zoos, aquariums and botanical gardens.

Canadian heritage institutions were equally popular with foreign visitors; they were among the top ten activities enjoyed by tourists who visited Canada in 1997. Historic sites and parks were visited by 39% of international visitors while a further 27% went to a zoo, museum, art gallery or natural display.[3]

Funding remains a challenge

Despite the popularity of heritage

1 *The General Social Survey, Culture Supplement, 1992 and 1998. A fuller discussion of consumption of culture can be found in Ogrodnik, 2000.* Patterns in Culture Consumption and Participation, *Culture Statistics Program, Statistics Canada.*
2 *Ibid. Ogrodnik, p. 20.*
3 *Statistics Canada, 1999.* Tourism Statistical Digest, *p. 34, International Travel Survey, 1997. The survey does not allow a breakdown of data between parks and historic sites.*

Table 1a
Overall, attendance at heritage institutions is stable

Type of heritage institution	1991-92	1992-93	1993-94	1995-96	1997-98	% change from 1991-92 to 1997-98
	attendance in 000's					
Museums	23,319	24,883	25,444	26,868	26,173	12
Community museums	3,187	3,285	3,352	3,516	3,886	22
Art museums	5,557	5,378	5,589	5,842	5,783	4
History museums	7,390	8,958	8,760	9,954	9,009	22
Other museums	7,185	7,262	7,742	7,556	7,496	4
Historic sites	16,784	16,725	17,020	16,535	16,073	-4
Archives	649	905	933	642	746	15
Others	13,712	11,815	11,531	10,437	10,832	-21
Total	**54,464**	**54,328**	**54,928**	**54,482**	**53,825**	**-1**

Table 1b
Museums are consistently the most popular type of heritage institution in Canada

Type of heritage institution	1991-92	1992-93	1993-94	1995-96	1997-98
	% of total attendance				
Museums	43	46	46	49	49
Community museums	6	6	6	6	7
Art museums	10	10	10	11	11
History museums	14	16	16	18	17
Other museums	13	13	14	14	14
Historic sites	31	31	31	30	30
Archives	1	2	2	1	1
Other types of institutions	25	22	21	19	20
Total	**100**	**100**	**100**	**100**	**100**

Table 2

Many Canadians, 15 and over, spent leisure time at heritage institutions in 1998

Heritage institution visited	000's	% of total population
Historic site	7,863	32.4
Zoo, aquarium or botanical garden	7,820	32.2
Museum or art gallery	7,210	29.7
Public art gallery or art museum	5,364	22.1
Science & technology, natural science or natural history museum	3,128	12.9
General, human history or community museum	2,637	10.9
Total population of Canada aged 15 and over	24,260	

Source: General Social Survey, 1998.

institutions, funding remains a challenge. Although funds come from many sources, patterns of funding seem to be changing. Public subsidy remains the major source of income but its importance has declined in recent years. In 1991-92, grants from all levels of government represented 71% of total operating revenues for Canadian heritage institutions. By 1997-98, this level had declined to 62%. Although there was some increase in the absolute value of government grants in 1997-98, operating expenses increased at a much faster rate. The average value of grants per institution increased 2% from 1995-96, but average expenditures rose by more than 6% during the two-year period (table 3). As a point of comparison, the Consumer Price Index (CPI) increased by 9% over the same period.

Between 1991-92 and 1997-98, subsidies from federal sources had dropped from 28% to 26% of total operating revenue. Provincial subsidies declined from 29% to 24% over the same time period. Municipal support showed the least change, dropping by only one percentage point to 13% (table 4). However, the average value of federal and municipal support per institution increased in 1997-98 while that of the provincial government decreased.

Paying for the pleasure

To continue their work, heritage institutions, the custodians of Canada's culture, have had to look to other revenue sources to support the bridge they provide between our country's past and future. Like other organisations that touch on the entertainment sector, heritage institutions must not only retain existing audiences but must regularly build new ones. The critical challenge is to simultaneously broaden their clientele while meeting their cultural mandate and living within tight budgets.

The Survey of Heritage Institutions shows that earned revenue as a percentage of total operating revenue reached a high of 29% in 1997-98, up from 27% in 1995-96 and considerably higher than the level of 20% reported in 1991-92 (table 5). Driven

Table 3

Average attendance, revenue and expenditures, 1995-96 to 1997-98

	Museums	Historic sites	Archives	Aquariums	Other	Total
Average attendance, 1997-98 (000's)	19.1	36.9	2.1	157.4	50.2	22.8
% change from 1995-96	-1	-1	18	-3	3	0
Average government grant, 1997-98 (000's)	265.6	211.9	280.8	262.0	382.8	267.6
% change from 1995-96	0	4	3	-35	10	2
Average institution & private donation, 1997-98 (000's)	44.1	7.2	39.9	15.3	51.4	37.6
% change from 1995-96	25	13	7	89	12	20
Average earned revenue, 1997-98 (000's)	12.5	94.6	10.1	1,709.7	337.6	124.6
% change from 1995-96	9	18	35	10	27	15
Average operating revenue, 1997-98 (000's)	435.1	313.7	330.9	2,124.6	771.8	429.8
% change from 1995-96	5	8	4	5	17	7
Average operating expenditure, 1997-98 (000's)	423.1	291.9	330.3	2,205.7	726.3	415.2
% change from 1995-96	4	7	3	-6	20	6
Surplus (deficit): % of operating revenue	3	7	0	-4	6	3

Table 4

Earned revenues growing at faster rate than unearned revenues

Type of revenue	1991-92		1997-98		% change 1991-92 to 1997-98
	000's	%	000's	%	
Total earned revenues	**170,973**	**20**	**293,718**	**29**	**42**
Membership fees	8,101	1	10,846	1	25
Admissions	59,680	7	106,081	10	44
Other earned revenues[1]	103,192	12	176,791	17	42
Total unearned revenues	**688,337**	**80**	**719,301**	**71**	**4**
Federal	240,634	28	259,653	26	7
Provincial	250,099	29	239,313	24	-5
Municipal and other govt's.	118,095	14	131,719	13	10
Institutions and private[2]	79,509	9	88,616	9	10
Total operating revenues	**859,310**	**100**	**1,013,019**	**100**	**15**

1 *Includes earned revenues such as gross revenues from giftshop, sales counter, cafeteria, camping or recreational activity fees as well as interest income and other earned revenue. Also includes unallocated operating revenues.*
2 *Includes educational, religious, institutional or corporate budgets; corporate or foundation grants; and donations.*

Table 5

Every type of heritage institution increased its earnings, as share of operating revenue, between 1995-96 and 1997-98

	Museums	Historic sites	Archives	Aquariums	Other	Total
	% share of total operating revenue					
Total earned revenue						
1997-98	28.8	30.1	3.1	80.5	43.7	29.0
1995-96	27.6	27.5	2.4	76.2	40.3	27.0
Change 1995-96 to 1997-98 *	1.2	2.6	0.7	4.3	3.4	2.0
Total unearned revenue						
1997-98	71.2	69.9	96.9	19.5	56.3	71.0
1995-96	72.4	72.5	97.6	23.8	59.7	73.0
Change 1995-96 to 1997-98 *	-1.2	-2.6	-0.7	-4.3	-3.4	-2.0
Federal sources						
1997-98	22.9	40.1	41.7	x	13.1	25.6
1995-96	24.0	39.9	45.3	x	8.9	26.3
Change 1995-96 to 1997-98 *	-1.1	0.2	-3.6	x	4.2	-0.7
Provincial sources						
1997-98	26.8	17.0	34.9	10.7	9.6	23.6
1995-96	30.2	19.9	31.5	18.9	11.8	26.4
Change 1995-96 to 1997-98 *	-3.4	-2.9	3.4	-8.2	-2.2	-2.8
Municipal & other gov't sources						
1997-98	11.3	10.5	8.3	x	26.9	13.0
1995-96	9.7	10.5	9.1	x	32.0	12.5
Change 1995-96 to 1997-98 *	1.6	0.0	-0.8	x	-5.1	0.5
Institutions & private sources						
1997-98	10.1	2.3	12.1	7.2	6.7	8.7
1995-96	8.5	2.2	11.8	x	7.0	7.8
Change 1995-96 to 1997-98 *	1.6	0.1	0.3	x	-0.3	0.9
Total operating revenue						
1997-98	100.0	100.0	100.0	100.0	100.0	100.0
1995-96	100.0	100.0	100.0	100.0	100.0	100.0

* *change in percentage share*
x *confidential*

by this increase in earned revenue, total operating revenue of heritage institutions surpassed the $1 billion mark for the first time in 1997-98.

Admission fees provide an obvious way for Canadian heritage institutions to increase revenue. In fact, 39% of all institutions charged admission in 1997-98, up from the 28% who had entry fees in 1991-92. For those institutions charging entry fees, the average price of $3.39 for an adult ticket in 1997-98 had risen by 24% from 1991-92, after accounting for inflation.

However, the increase of entrance fees in order to improve revenues may be a double-edged sword. It is possible that increased admission fees may discourage potential visitors from spending time at heritage institutions. Further research is necessary to determine what effect increased admission fees may have on attendance levels.

The very different roles and, therefore, audiences of heritage institutions also influence their ability to generate earned revenues. For example, archives, which are primary research facilities and have a limited visitor base, are far more dependent on government financing than aquariums, which reach out to entertain and educate the general public. This is reflected in the average earned revenues per admission of $4.78 for archives and $10.86 for aquariums (table 6). In 1997-98, archives obtained only 3.1% of their funds from earned revenues whereas aquariums received 80.5% from this source. Museums, at $6.55 per admission, were 20% higher than the national average for all heritage institutions.

Given the need to compete for audiences, heritage institutions are now not only focused on raising revenues through admission fees but also by way of retail sales and services. Other ways of improving the bottom line are being found through commercial services such as gift shops, restaurants, parking and film presentations. In particular, the gift shops found at many sites across the country have become big business; earned revenue from all of these business ventures has become an important factor in keeping many institutions afloat. Overall, these efforts have almost doubled institutions' earned revenue per admission from $3.14 in 1991-92 to $5.46 in 1997-98 (table 6).

Heritage institutions in the electronic age

Not only do they exploit conventional channels to earn revenue, heritage institutions have also been exploring other innovative means to provide access to our rich cultural heritage. Although a number of institutions are employing technologies such as CD-ROMs and other interactive services to facilitate this access, perhaps the most visible development has been the use of websites. The larger the size of an institution, the more likely it is to have a website. Eighty-two per cent of institutions with operating revenues of one million dollars and over had a website in 1997-98. For those with revenue in the range of $100,000 dollars to a million dollars, the comparable figure was 64%. Slightly less than one quarter of smaller institutions, earning less than $100,000, reported having a website.

The popularity of websites with different age groups can be seen through results of the GSS. Although only a relatively small proportion of respondents (4%) reported viewing arts or museum collections on the Internet, younger Canadians showed significantly higher participation rates. For those aged 15 to 19[4], the rate was 11%. At 7%, those aged 20 to 24 also reported above-average rates. In general, the GSS showed that Canadians under the age of 60 had a relatively stable participation rate for conventional visits to art or museum collections (approximately 30%), although the patterns of participation varied with age. For example, young people between 15 and 19 years of age reported the highest rates of attendance at museums and public art galleries (35%). By combining their increased use of electronic access to the collections with conventional attendance at heritage institutions, younger Canadians actually had the highest overall participation rate. This could bode well for heritage institutions in the future, if today's youth maintain their interest in heritage into later life.

Table 6
Aquariums continue to have highest earned revenue per admission

Heritage institution	1991-92	1993-94	1995-96	1997-98
	Earned revenue per admission ($ current)			
Museums	4.27	4.62	5.93	6.55
Historic sites	1.59	1.65	2.14	2.57
Archives	2.34	1.83	4.19	4.78
Aquariums	6.55	8.43	9.57	10.86
Other institutions	2.85	3.74	5.47	6.73
Total	**3.14**	**3.56**	**4.75**	**5.46**

[4] *This was the youngest age group covered by the General Social Survey (GSS).*

Internet viewing of collections also increased with income and education showing the same pattern as conventional visits to these venues. Half of all Canadians with an annual household income in excess of $80,000 visited museums or art galleries in 1998 compared to 22% of those with incomes of less than $20,000. For those who viewed collections through the Internet, the participation rate was 6% for Canadians with household incomes in excess of $80,000, twice as high as for those with incomes of less than $20,000. Greater participation of higher-income groups may also lead to increased earned revenue for those institutions, which choose to participate in E-commerce.

Volunteers crucial to heritage institutions

Improvements to the financial situation of heritage institutions are not always made just on the revenue side of the ledger. Two other areas are of particular note. First and foremost is the role of volunteers. Canadians who contribute their time to organisations are critical in many areas of the culture sector but their work is perhaps most evident in heritage institutions.

Without volunteers, heritage institutions would be hard pressed to meet their mandate. Volunteers make it easier for heritage institutions to adapt to the fierce competition for the entertainment dollars. The amount of time they donate each year represents huge savings for institutions. In 1997-98, volunteers outnumbered salaried staff by approximately two to one. Of the 70,000 workers in heritage institutions, 46,400 were volunteers and 13,700 were paid part-timers. Only 14% (9,900) occupied full-time paid positions.

At its highest point in 1993-94, volunteers accounted for nearly 70% of the workforce of heritage institutions. By 1997-98, this figure had declined to 66%.[5] If this trend continues, institutions will either have to spend more on staff support in order to hire additional paid staff or they may have to cut back on services.

Another area where institutions appear to be reducing expenses is by outsourcing certain portions of their administration. While this may produce some direct savings, some institutions have indicated that it may have an impact on their volunteer labour force. They fear that some volunteers may not want to donate their time if the programs are to be run by an external company, particularly if the outsourcing is felt to threaten the quality or the level of services offered.

Looking to the future

The period of fiscal restraint for federal and provincial governments seems to have eased, at least for the moment. The most recent data from the Survey of Government Expenditures on Culture indicate an overall 3% increase in spending on heritage activities from 1997-98 to 1998-99[6].

Also, while the expenditure by Canadians on heritage has grown since 1991-92, there is no indication that this growth will continue into the future. Spending by Canadians has increased but the reasons, as noted earlier, are not due to increased attendance but appear to be the result of increased admission fees and other earned revenues. Heritage institutions must continue to balance the desire to make public collections accessible to the public with the need for more revenue.

An additional concern is that the baby-boom bulge is approaching retirement age and the General Social Survey has shown that Canadians currently over 60 years old have the lowest level of museum attendance. This points to a possible decline in the future in the number of Canadian visitors to our heritage institutions. This survey also showed, however, that attendance was greater by individuals with higher income and education levels; baby boomers, mostly empty nesters and more highly educated than previous generations, are likely to have more disposable income that would be available to spend on visits to museums, art galleries and related institutions. It is too soon to know how the unique characteristics of the baby boom generation will translate into visits (real or virtual) to Canada's heritage institutions.

In 1999, about 42% of Canadian households used the Internet regularly[7], up from 29% two years earlier. If heritage institutions want to profit from Canadians' increasing use of the Internet, they will have to put concerted effort into providing content that will attract potential visitors. This will require significant investment. Even the largest heritage institutions are not necessarily financed well enough to ensure a credible Internet presence. To quote an old maxim; it takes money to make money.

Thus the same lack of resources that limits an institution's ability to support

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5 *These figures, however, do not take into account the actual amount of time worked by volunteers and it is possible that fewer individuals are working more hours.*
6 *Excludes expenditures on Parks Canada and other program administration employees.*
7 *Household Internet Use Survey, 1999.*

a range of essential services, may also inhibit investments in computers and the skills necessary for product development, digitisation and web design. Heritage institutions know that they must work hard to succeed in this new digital environment. The Internet provides the potential for the growth that they aspire to but, at the same time, can be seen to offer up just another competitive threat. If they are successful, however, the Internet, along with other technological tools, has the potential to extend the institution's interaction with Canadians. It may also open new avenues for increased revenues. All in all, the new millennium holds challenging and exciting times for institutions in this important sector.

Heritage institutions – older than Confederation

Heritage institutions have existed in Canada, in some form or another, for over 200 years. According to the Canadian Museums Association (CMA), there are a number of institutions that could be given the honour of being called the first museum in Canada. Religious institutions in Quebec held collections of natural history specimens, religious relics and early paintings in the early years of settlement and a mineralogical collection existed at Laval University as early as the 1790's. The Hudson's Bay Company established its own collections based on the many valued objects amassed from years of trading with Canada's Aboriginal peoples. Many other private collections are known to have existed which, in time, were converted to public institutions.

However, it was not until 1841, with the creation of the Geological Survey of Canada, that a public heritage institution could be said to have existed in Canada. It took almost another 100 years before there were substantial numbers of heritage institutions across the country. These included, in 1938, 150 non-profit museums. By 1984, however, the numbers had increased significantly to 1,414 institutions, and, by 1998, Canadians could visit 2,357 heritage institutions (excluding parks) across Canada.

The variety and scope of Canada's heritage institutions is extensive, ranging from small community museums and archives to large internationally known historic sites. They may be part of the operations of the federal government (such as the Museum of Civilization in the National Capital Region and the Fortress of Louisbourg in Nova Scotia), a provincial/territorial government (such as the Tyrell Museum of Palaeontology in Drumheller, Alberta; the Prince of Wales Northern Heritage Centre in Whitehorse, Yukon; the Village historique Acadien in New Brunswick; the Archives national du Québec), or be run by a local or municipal government (the Metropolitan Toronto Zoo, the Montreal Botanical Gardens or the City of Regina Archives). There are also large numbers of heritage institutions that are privately administered by organisations, foundations, corporations, boards or through a variety of partnerships. These include institutions such as the United Church Archives, the Memorial University of Newfoundland Botanical Garden, the Vancouver Aquarium and the Confederation Centre for the Arts in Charlottetown, Prince Edward Island.

Heritage institutions contain an extraordinary array of collections that document a wide variety of materials and subject matter, ranging from paintings, drawings and sculpture, to human, military and natural history; from natural science to technology; from plants, aquatic life and animals, to archival records that include paper, photographs, motion pictures, electronic documents, maps and sound recordings. Canada's heritage institutions attempt to preserve, document, make understandable and give recognition to the country's natural and cultural heritage. It is a massive undertaking that requires substantial financial, human and intellectual resources.

A short history of museums in Canada, entitled 'About the Museums of Canada', is available on the website of the Canadian Museums Association at http://www.museums.ca . Also see Statistics Canada, 2000. Canadian Culture in Perspective: A Statistical Overview, *p. 72.*

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Provincial/Territorial data

Average hours per week of television viewing, by province and age/sex groups, fall 1999

	Canada	Nfld.	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta	B.C.
Total population	**21.6**	**24.5**	**20.7**	**22.1**	**22.9**	**24.7**	**20.5**	**20.3**	**20.8**	**19.6**	**20.7**
Men											
18+	20.9	23.2	20.0	21.5	21.8	23.4	19.6	19.7	20.0	19.3	21.3
18-24	13.8	12.8	7.9	13.6	13.1	14.0	13.6	11.1	13.9	14.0	14.8
25-34	17.5	20.6	17.3	20.6	19.9	18.6	16.6	16.1	18.4	16.5	17.6
35-49	18.6	23.6	18.8	19.4	18.6	21.2	17.1	17.2	16.8	17.6	18.9
50-59	22.4	24.5	22.5	23.4	24.8	25.0	21.3	21.0	22.8	20.0	21.2
60+	31.5	29.8	28.3	28.7	31.1	36.9	29.0	31.1	27.7	30.6	32.3
Women											
18+	25.5	29.0	24.8	25.7	26.7	29.5	24.2	24.4	24.5	23.1	23.6
18-24	17.6	26.6	19.8	16.9	18.3	19.1	16.5	16.5	17.6	15.8	17.7
25-34	21.0	26.1	22.5	23.2	24.7	23.7	19.2	21.7	22.7	20.7	19.4
35-49	22.4	27.2	23.0	23.7	24.2	26.3	20.9	20.6	20.6	20.7	21.0
50-59	27.6	28.0	24.3	26.1	27.3	30.8	28.6	26.5	24.3	24.1	21.9
60+	35.5	36.5	30.8	32.9	34.0	42.0	33.2	32.9	33.1	33.5	33.9
Teens											
12-17	15.5	16.3	13.0	16.8	17.5	16.7	15.3	14.2	15.5	15.0	14.5
Children											
2-11	15.5	19.0	15.9	15.3	17.0	18.2	14.9	15.1	16.1	13.7	13.1

Source: Culture Statistics Program Television Project, Fall 1999.

1998-1999 was a difficult year for some performing arts companies

	Canada	Nfld	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta	B.C.	Yuk	N.W.T.
Theatre													
Number of companies	350	6	4	15	4	137	108	9	7	25	34	1	-
Total performances	33,167	407	409	1,357	570	8,668	10,660	2,048	476	4,204	4,359	9	-
Total attendance (000's)	7,861.8	71.1	118.8	287.6	114.6	2,062.0	2,874.6	426.3	108.1	722.0	1,076.2	1.7	-
Total expenditures (000's)	239,977.1	1,527.9	2,422.6	9,302.7	3,165.6	57,556.2	108,866.1	9,940.4	2,914.3	20,652.9	23,430.2	198.3	-
Total revenue (000's)	240,124.1	1,474.6	2,403.3	8,431.0	3,267.5	58,318.3	108,771.7	9,770.0	2,968.5	21,206.7	23,365.3	147.2	-
Surplus/deficit (000's)	147.0	-53.3	-19.3	-871.6	101.9	762.1	-94.4	-170.3	54.2	553.8	-64.9	-51.1	-
Music													
Number of companies	160	1	1	3	2	55	62	6	3	8	19	-	-
Total performances	4,914	22	4	94	95	2,066	1,232	144	185	526	546	-	-
Total attendance (000's)	3,401.8	12.7	2.7	55.7	27.3	1,069.4	1,049.0	137.2	95.9	386.2	565.7	-	-
Total expenditures (000's)	133,216.3	603.2	126.4	2,321.6	586.3	38,486.5	49,527.9	7,122.0	1,954.9	15,369.1	17,118.4	-	-
Total revenue (000's)	130,291.6	616.4	108.0	2,276.4	698.7	37,603.9	47,799.9	6,598.9	1,927.9	15,503.5	17,157.8	-	-
Surplus/deficit (000's)	-2,924.7	13.2	-18.4	-45.2	112.5	-882.5	-1,727.9	-523.0	-27.1	134.4	39.4	-	-
Dance													
Number of companies	92	1	-	3	1	29	29	3	2	7	15	1	1
Total performances	3,080	15	-	30	31	800	1,123	114	12	487	384	10	74
Total attendance (000's)	1,463.8	4.4	-	4.2	15.0	396.4	559.3	119.6	3.8	223.1	134.0	2.1	1.9
Total expenditures (000's)	61,034.6	135.1	-	195.3	110.5	19,000.4	21,216.4	8,406.8	181.9	6,986.5	4,607.2	91.1	103.4
Total revenue (000's)	59,712.9	93.0	-	176.1	110.0	18,332.7	20,298.8	8,502.4	182.9	7,299.1	4,523.6	98.9	95.4
Surplus/deficit (000's)	-1,321.6	-42.1	-	-19.2	-0.5	-667.7	-917.6	95.6	0.9	312.6	-83.6	7.8	-8.0
Opera													
Number of companies	23	-	-	-	1	5	11	1	1	2	2	-	-
Total performances	598	-	-	-	3	99	260	10	2	31	193	-	-
Total attendance (000's)	592.4	-	-	-	2.6	124.4	274.6	9.3	3.5	52.2	125.9	-	-
Total expenditures (000's)	44,821.4	-	-	-	68.4	9,339.4	21,545.3	1,157.8	224.8	5,119.4	7,366.4	-	-
Total revenue (000's)	44,005.6	-	-	-	112.3	9,325.2	21,465.5	811.4	254.2	5,018.3	7,018.6	-	-
Surplus/deficit (000's)	-815.9	-	-	-	43.9	-14.2	-79.8	-346.4	29.4	-101.1	-347.8	-	-

Source: Survey of Performing Arts Companies, 1998-1999.

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