

# CULTURAL SECTOR FAST STATS



Cultural  
Human Resources  
Council

Conseil  
des ressources humaines  
du secteur culturel

# CULTURAL SECTOR FAST STATS

© Cultural Human Resources Council 2004

This project is funded by the Government of Canada's  
Sector Council Program.

Canada

Prepared for

The Cultural Human Resources Council

Terry Cheney

T.J. Cheney Research Inc.

Spring, 2004



# TABLE OF CONTENTS

	<b>PAGE</b>
<b>FOREWORD</b>	iii
<b>INTRODUCTION</b>	v
<b>AUDIO-VISUAL AND LIVE PERFORMING ARTS</b>	1
<b>HERITAGE</b>	5
<b>MUSIC AND SOUND RECORDING</b>	7
<b>VISUAL ARTS AND CRAFTS</b>	11
<b>WRITING AND PUBLISHING</b>	13
<b>GENERAL STATISTICS CANADA SURVEY NOTES</b>	15
<b>NEEDS AND OTHER SOURCES</b>	17
<b>APPENDIX A — CENSUS DATA ON CULTURAL SECTOR OCCUPATIONS, 1991 AND 2001</b>	19
<b>APPENDIX B — SOURCES</b>	23





## FOREWORD

The Cultural Human Resources Council is pleased to present this tool kit of “Fast Stats” on the cultural sector. It provides in a brief space a quick statistical overview of the dimensions of what the sector is all about, detail which should be accessible to everyone in the sector, but has never before been so succinct, and made freely available to all.

It is also with a cautionary note that we present this material. While it is the best available, and indisputably useful, it does not completely represent either the social or the economic extent of the sector. A particular concern to CHRC is that it noticeably misrepresents the average working conditions of those involved in the cultural labour force — the roles of part-time versus full-time, of self-employment, of multiple job holdings, and of earnings.

As a result, policy, programme and funding initiatives are developed with incomplete data. To this end we strongly endorse the key recommendation for needed research, a renewal of the Survey of the Cultural Labour Force which was undertaken by Statistics Canada with the support of Human Resources Development Canada over ten years ago.





# INTRODUCTION

One of the basic hurdles facing the Cultural Human Resources Council (CHRC) has been the absence of focused, timely, comprehensive, and defensible statistics on the cultural sector. This document has been developed to provide such information.

Fast Stats is derived from available sources of information on CHRC's sub-sectors. It puts on one page per sector, ten to fifteen key overall indicators of the scale of activity based upon publicly available (therefore traceable) Statistics Canada data. These figures can be tracked directly to a Statistics Canada source, and have not been altered by adjustments or interpretations.

The Statistics Canada data are supplemented by

- (i) explanatory detail on the survey sources; and
- (ii) auxiliary information available from Statistics Canada.

This selection of Fast Stats on culture is complemented by observations from the sector's point of view providing assessments of the strength and limitations of these data, together with figures which are 'in the air' from the sector.

## CONTEXT

Several observations set the context for this exercise.

First, the Web sites of national associations often contain little or no data. If they do, they may cite one or two figures, or if there is more detail, it is often (a) dated and (b) taken from Statistics Canada. (The clear exception is the CFTPA.)

Second, data which are available in major reports (e.g. the Standing Committee on Canadian Heritage's report "A Sense of Place, A Sense of Being") are quickly outdated. The present data sheets can be updated easily on a regular basis.

Third, Statistics Canada has recently made detailed tables from its Culture Statistics Program surveys available (for free) on its Web site (<http://www.statcan.ca/english/freepub/87-008-GIE/about.htm>). People can therefore link to the Statistics Canada site and obtain specific data (a) by province, or by individual discipline (e.g. theatre, or trade books, or feature films), or, (b) more detailed data (e.g. support by level of government) to probe more deeply into the summary figures cited here. In most cases the data are available for the past five years. The interpretive essays published in "Focus on Culture" are also now available on-line for free.



## CAUTIONS

While the sector recognizes the usefulness of the Statistics Canada resource, the Statistics Canada figures currently available:

- provide limited coverage of those who work in the culture labour force (reporting only on those whose primary occupation the week of the survey was cultural);
- do not cover all of the activity of the sector;
- conflict with other sources on rates of involvement with cultural activities by Canadians (the market).

## NEEDS

To adequately and effectively plan for the development of the cultural labour force, three sources of statistics on the sector need further development:

- 1) A new Survey of the Cultural Labour Force: this would follow up on that conducted by Statistics Canada for 1993 and provide culture sector labour force specific information which cannot be derived from existing sources.

- 2) A new Survey of the Market for Cultural Products: this would include both time spent and expenditures by Canadians. Since the last survey in 1998 there have been dramatic change in the modes of creation, production and distribution of cultural products, as well as ongoing systemic changes in the Canadian population.
- 3) Expanded surveying of all Cultural Institutions and Businesses: this would include the commercial performing arts, community and volunteer activity, all film production, and new media.

## THIS REPORT

The data in this report are provided in five sections:

- Audio-visual and live performing arts;
- Heritage;
- Music and sound recording;
- Visual arts and crafts; and
- Writing and publishing.

Each section has several pages: the Statistics Canada data, notes on the Statistics Canada sources, and selected sector observations on the data available.

The report begins with an overall summary section and ends with a list of sources and a table of 2001 Census figures on cultural occupations.

## GENERAL CAUTIONARY NOTES

The *employment data* are based on the Canadian Census which reports on those who earned money in a primary occupation which was cultural the week preceding the survey (detailed numbers for 2001 and 1991 are in Appendix A). Self-employment figures for individual occupations can be much higher than the overall sub-sector averages. Other sources produce different figures. For example, using the Labour Force Survey gives a total figure of 578,000 workers in the culture workforce for 2001, while the Census figures used here total about 515,000.

The *government expenditures* shown are for 2000–01 direct spending and do not take into account indirect support through tax treatment (important for film) or the effects of regulation (important for sound recording). They also do not reflect the recent increases in federal government spending, although government spending on culture began to rise in the late 1990s.

The *organizational data* naturally reflect those surveyed by Statistics Canada and are not necessarily all organizations active in the area.

The *population participation* figures are from 1998.

*Exports* are an estimate developed by Statistics Canada, in cooperation with the Departments of Canadian Heritage and Foreign Affairs and International Trade, for culture goods (not services).

The major limitations of these data that should be addressed in future research are:

- Existing data do not cover all cultural activity;
- The labour force estimates do not include many people working in culture;
- Participation and purchasing data are a weak representation of the marketplace and impact of the sector.

## CULTURE SECTOR — OVERALL SUMMARY

Employment <sup>1</sup>	<b>516,000</b> — 3.1% of total labour force
Self-employment <sup>2</sup>	<b>21%</b>
Total Employment Earnings <sup>3</sup>	<b>\$15.5 billion</b>
Economic Impact <sup>4</sup>	<b>\$33 billion</b> and <b>733,000 jobs</b>
Government Expenditures	<b>\$7.2 billion</b>
Number of Organizations	tens of thousands
Population Participation	virtually <b>everyone</b> ; 350,000 volunteers
Household Expenditures	<b>\$14 billion</b>
Trends	<b>19% growth</b> in labour force, 1991–2001
Exports	<b>\$4.2 billion</b> <sup>5</sup>

<sup>1</sup> Detail for the occupations included from the Census is provided in Appendix A.

<sup>2</sup> Detail for the occupations included from the Census is provided in Appendix A.

<sup>3</sup> Calculated from the data in Appendix A.

<sup>4</sup> Statistics Canada. Canada: A Portrait. 57th edition. 2002, p. 99.

<sup>5</sup> Canada: A Portrait, p. 100, for 2000. Other Statistics Canada figures are for goods only, which totaled \$2.3 billion for 2002.

## SUMMARY: CULTURE SECTOR INDICATORS FROM STATISTICS CANADA

	A/V & LPAs	Heritage	Music & Sound	Visual Arts	Writing & Publishing	Combined
Labour Force	97,000	54,000	42,000	162,000	160,000	516,000
Labour Force Change 1991–2001	35%	-4%	25%	29%	10%	19%
Self-employed	18%	2%	47%	29%	14%	21%
Average Income	\$33,000	\$26,000	\$20,000	\$28,000	\$33,000	\$30,000
Total Employment Income (\$million)	3,200	1,400	840	4,500	5,400	15,500
Household Spending (\$million)	5,400	530	4,000	1,000	3,000	13,930
Direct Government Spending (\$million)	2,567	3,600	27	68	198	6,460

Notes: All figures are from Statistics Canada.

- a) Expenditures on broadcasting are reported under A/V & LPAs.
- b) Some expenditures on music and sound will be under A/V & LPAs for non-profit performing arts companies and broadcasting.
- c) Published figures on total government spending (\$7.2 billion) include multiculturalism and 'other' not incorporated in this total.





# AUDIO-VISUAL AND LIVE PERFORMING ARTS

1

This section includes people working in recorded media (e.g. film, tv), live theatre and dance (but excluding music).

## STATISTICS CANADA DATA — A/V AND LIVE PERFORMING ARTS

<i>Labour Force, 2001</i> <sup>6</sup> —	<b>97,335</b> ; self-employed: <b>18%</b>
<i>Labour Force Trends</i> —	<b>35%</b> growth from 1991–2001
<i>Earned Income</i> —	average: <b>\$32,992</b> ; total employment earnings: <b>\$3.2 billion</b>
<i>Adult Annual Participation</i> <sup>7</sup> —	<b>59%</b> go to movies; <b>73%</b> watch a video; <b>50%</b> <sup>8</sup> go to a <b>live performing arts event or festival</b> .
<i>Annual Household Spending</i> —	<b>\$5.4 billion</b> : <b>\$1.2 billion</b> on movie theatre admissions; <b>\$1.2 billion</b> on rental of videos/DVDs ; <b>\$824 million</b> on tickets to live performing arts; <sup>9</sup> <b>\$2.2 billion</b> purchasing television/video equipment. (Households also spend <b>\$4.6 billion</b> on cable and satellite services.)
<i>Direct Government Spending</i> —	<b>\$2.5 billion</b> : Performing Arts: \$352 million; <sup>10</sup> Film and Video: \$415 million; <sup>11</sup> Broadcasting: \$1.8 billion. Performing Arts were up 24% from 1996 to 2001; Film and Video by 16%.
<i>Exports</i> —	<b>\$676 million</b> : Performing arts: \$13.5 million; <sup>12</sup> A/V: \$662 million (nearly doubled since 1996). <sup>13</sup>
<i>Economic Impact</i> —	part of \$5 billion attributable to the ‘arts,’ <sup>14</sup> and \$14 billion attributed to the cultural industries. <sup>15</sup>

<sup>6</sup> Detail for the occupations included from the Census is provided in Appendix A.

<sup>7</sup> Statistics Canada, General Social Survey, 1998. Covers only people over 15 years of age.

<sup>8</sup> Will incorporate music.

<sup>9</sup> Includes music performances.

<sup>10</sup> Includes music.

<sup>11</sup> These figures exclude tax expenditures which in the case of film production can be quite large.

<sup>12</sup> Survey of Performing Arts.

<sup>13</sup> 2001 data puts exports at \$662 million (87-010-XIE). 87F0007XDB measuring exports of goods puts the figure at \$300 million (adding “films etc.,” “dvds etc.,” and “video tapes etc.”) “Canadian Culture in Perspective” put exports at \$430 million for 1997–98, p. 106.

<sup>14</sup> Statistics Canada, in “Canadian Culture in Perspective” groups ‘performing and other staged performances, visual arts, crafts, architecture, photography, design and advertising’ in this category.

<sup>15</sup> Statistics Canada in “Canadian Culture in Perspective” does not explain what is included in this group, but it is presumably publishing and sound recording as well as broadcasting and film.

### Organizations

	No.	Revenue \$million	Public Funding \$million	Employees <sup>16</sup>	Admissions million
<i>Theatre and Dance</i>					
2000	414	347	101	-	9.8
1996	432	258	82	-	9.1
<i>Movie Theatres</i>					
2000	746	1,023	-	22,680 <sup>17</sup>	119
1996	656	628	-	10,326	91
<i>Film/AV Production</i>					
2001	728	1,674 <sup>18</sup>	-	37,234 <sup>19</sup>	-
1997	702	1,135	-	21,350	-
<i>Film and Video Distribution and Wholesaling</i>					
2001	217	3,037		3,900	-

## STATISTICS CANADA SURVEY NOTES\* — A/V AND LIVE PERFORMING ARTS

In terms of coverage, the performing arts companies surveyed are only professional, not-for profit groups. The response rate for the latest year was 92%. Data was imputed (estimated) for the non-respondents. The survey is conducted every two years, and has been in existence since the 1970s.

The 'motion picture theatres survey' covers all theatres and drive-ins, and is conducted annually. It has been in existence since 1930. The response rate for the latest year was 90%. Data was imputed (estimated) for the non-respondents.

The 'film video and audio-visual distribution' survey covers distribution and wholesaling in Canada. It is an annual census which began in 1930. The response rate for the latest year was 73%. Data was imputed (estimated) for the non-respondents.

The 'film, video and audio-visual production survey' is a census of film, video and audio-visual production operations in Canada identified from Statistics Canada's Business Registry. It is conducted annually and has been in existence since 1952.

<sup>16</sup> Includes full-time, part-time, freelancers and working proprietors.

<sup>17</sup> There was a substantial increase in 2000 of about 50% over 1999 figures.

<sup>18</sup> Revenue from production only.

<sup>19</sup> Includes 26,000 freelancers, up from 13,000 in 1997.

\* Also see the general notes regarding Statistics Canada sources at the end of the document.

The 'motion picture laboratory operations and production and post-production services survey' is an annual census of these operations. It began in 1952.

Some general Statistics Canada comments on the A/V and Live Performing Arts sector include:

- Distribution sales of films and videos generated revenues of \$2.1 billion in 1998–99 (Canada: A Portrait, 104). Film and video distribution was reported as \$1.4 billion, and wholesaling videocassettes as \$1.5 billion for 2001 (in 87F0010XIE for 217 firms).
  - Post-production revenues are noted as \$597 million for 1997–98 (Canadian Culture in Perspective, 107).
  - Revenue for broadcasting was \$7.2 billion for 1998 (Canadian Culture in Perspective, 110).
  - The federal government supported nearly 150 festivals reporting revenues of \$86 million for 1997–98 (Canadian Culture in Perspective, 89).
  - The Survey of Arts, Entertainment and Recreation Services states “performing arts companies such as theatre, opera and dance companies, accounted for \$1.0 billion in operating revenues in 2002.” Their categories are theatre, musical theatre, opera, dinner theatre, dance companies, musical groups and artists, and ‘other’ (e.g. circus, ice skating and magic shows).
- ‘community’ performing arts companies (no paid staff)
  - presenters
  - performing arts facilities
  - volunteers
  - retail distribution
  - related retail spending/economic impacts (e.g. theatre concessions, babysitters, taxis...)
  - tracking indirect government support

## SECTOR OBSERVATIONS — A/V AND LIVE PERFORMING ART

### SIGNIFICANT GAPS WHERE NO DATA ARE AVAILABLE:

- total film production activity
- commercial performing arts

## SECTOR ESTIMATES

CFTPA provides annual overviews of the Canadian film production industry (see “Profile 2004”).

They cite **\$4.9 billion** in production volume including:

- CAVCO-certified (\$1.8 billion);
- CRTC-certified (\$0.3 billion);
- broadcaster in-house (\$1.0 billion); and
- foreign location shooting (\$1.9 billion).

They estimate **\$2.4 billion** in export value due to \$475 million in sales and \$1.9 billion from foreign location shooting.



In terms of economic impact they calculate film production accounts for **133,400** full-time equivalent jobs, with 51,000 directly in film and television production (this is estimated from Labour Force Survey Data rather than the film production survey).

They also report box office receipts for 2002 as about **\$1 billion**.

*The Business of Culture* carried out for Ontario in the mid-1990s estimated the value of commercial theatre for that province at \$130 million and 2,000 direct jobs (1994).

The Culture Careers Council of Ontario Web site quotes the live performing arts as representing nearly 40,000 jobs in Ontario and \$340 million of national economic impact.

ACTRA reports it has 18,000 members working in English recorded media.

Data on a selected number of performing arts companies is also available from the Council for Business and the Arts Survey.

# HERITAGE

# 2

Heritage includes activities relating to collecting and managing, preserving and presenting natural and historical artifacts. It includes museums, archives, built heritage and libraries.

## STATISTICS CANADA DATA — HERITAGE

<i>Labour Force, 2001</i> <sup>20</sup> —	<b>54,200</b> ; self-employed: <b>2%</b>
<i>Labour Force Trends</i> —	<b>4%</b> decline from 1991–2001
<i>Earned Income</i> —	average: <b>\$25,961</b> ; total employment earnings: <b>\$1.4 billion</b>
<i>Adult Annual Participation</i> —	63% visit at least one heritage institution (e.g. 30% to a museums, 25% used a library), accounting for nearly <b>70 million</b> visits to heritage attractions and <b>50 million</b> to libraries. <sup>21</sup>
<i>Household Spending</i> —	<b>\$532 million</b> : admissions to museums — \$370 million; \$162 million purchasing antiques.
<i>Direct Government Spending</i> —	<b>\$3.6 billion</b> : \$1.4 billion on heritage institutions, \$2.2 billion on libraries.
<i>Exports</i> —	<b>\$23 million</b> in 2002, relatively constant since 1996.

<i>Organizations</i>	No.	Revenue \$million	Public Funding \$million	Employees <sup>22</sup>	Use/ Attendance million
<i>Libraries</i> <sup>23, 24</sup>					
1999	19,000	3,000	-	50,000	50
<i>Heritage Institutions</i> <sup>25</sup>					
1999	2,436	1,117	655	24,922	56
1995	2,390	959	625	23,235	54

<sup>20</sup> Detail for the occupations included from the Census is provided in Appendix A.

<sup>21</sup> Arts and Heritage Participation in the Internet Age; drawn from the 1998 General Social Survey. Note: Attendance reported by the population will not match the attendance reported by the institutions.

<sup>22</sup> Includes full-time, part-time, but not volunteers.

<sup>23</sup> Taken from the National Library Core Statistics Program.

<sup>24</sup> Excludes school libraries.

<sup>25</sup> Includes public art galleries.

## STATISTICS CANADA SURVEY NOTES\* — *HERITAGE*

The heritage-specific source of data from Statistics Canada is the 'survey of heritage institutions', a census of non-profit heritage institutions which include museums, art galleries, historic sites, conservation areas, zoos, nature parks, and related institutions. It was first conducted in 1938, and annually or biennially since 1970. It is currently biennial. The data used here exclude nature parks and art galleries.

Statistics Canada has not carried out surveys of libraries for some years, although it provided data on school libraries, university and college libraries, and on public libraries in earlier years. The data here come from the National Core Library Statistics program run out of the National Library but does not include school libraries in its data.

## SECTOR OBSERVATIONS — *HERITAGE*

### *SIGNIFICANT GAPS WHERE NO DATA ARE AVAILABLE:*

- built heritage: heritage restoration and renovation
- volunteers
- school libraries

### *SECTOR ESTIMATES*

The sector tends to draw on the Statistics Canada survey although complementary data on a selected number of museums is available from the Council for Business and the Arts Survey of art galleries and museums which stresses areas such as private sector support.

A study commissioned by the Canadian Library Association reported that in 1997 two-thirds of Canadians used a public library, 20% once a month.

---

\* Also see the general notes regarding Statistics Canada sources at the end of the document.

## MUSIC AND SOUND RECORDING

3

Music and sound recording includes the sound recording industry as well as live music performances, including orchestras.

### STATISTICS CANADA DATA — MUSIC AND SOUND RECORDING

<i>Labour Force, 2001</i> <sup>26</sup> —	<b>42,370</b> ; self-employed: <b>47%</b>
<i>Labour Force Trends</i> —	<b>25%</b> growth from 1991–2001
<i>Average Income</i> —	<b>\$19,816</b> ; total employment earnings: <b>\$840 million</b>
<i>Adult Participation</i> —	<b>77%</b> listen to recorded music; <b>35%</b> attend professional concerts or performances; <b>17%</b> play a musical instrument; <b>8%</b> sing in a choir.
<i>Household Spending</i> —	<b>\$4 billion</b> : <b>\$1.6 billion</b> for pre-recorded Cds and tapes; <sup>27</sup> a portion of the <b>\$820 million</b> spent on attending live performances; <b>\$452 million</b> on musical instruments; <b>\$1.1 billion</b> purchasing audio equipment.
<i>Direct Government Spending</i> —	<b>\$26.5 million</b>
<i>Exports</i> —	<b>\$158 million</b> in 2002 (for Cds, records and cassettes, and music), relatively constant since 1998.

<i>Organizations</i>	No.	Revenue	Public Funding	Employees <sup>28</sup>	Attendance
		\$million	\$million		million
<i>Non-profit Performing Arts — Music*</i>					
2000	169	197	64	-	4.5
1996	169	161	50	-	4.3
<i>'Labels' and Production Companies</i>					
2000	331	861	-	2,591	119,617
1995	254	875	-	2,711	91,327

<sup>26</sup> Detail for the occupations included from the Census is provided in Appendix A.

<sup>27</sup> Data for 2001 will include spending on DVDs.

<sup>28</sup> Full-time only; in previous years, part-time and freelancers reported were minimal.

\* Includes opera.

## **STATISTICS CANADA SURVEY NOTES\* — *MUSIC AND SOUND RECORDING***

In terms of coverage, the performing music companies surveyed are part of the 'performing arts survey' covering only professional, not-for profit groups. The response rate for the latest year was 92%. Data was imputed (estimated) for the non-respondents. The survey is conducted every two years, and has been in existence since the 1970s.

The 'sound recording survey' covers "firms that have sales and/or releases of records, prerecorded tapes or compact discs manufactured from master tapes either owned by them or leased from others." It is a biennial census and was first conducted in 1977. The response rate for the latest survey was 84% and data was imputed (estimated) for the non-respondents.

A new survey on 'music publishers' was conducted for 2000.

A related source for live performances is data on festivals which Statistics Canada derived from the Department of Canadian Heritage. About 150 festivals reported revenues of \$86 million in 1997–98 (Canadian Culture in Perspective, 89).

The Survey of Arts, Entertainment and Recreation Services states "performing arts companies such as theatre, opera and dance companies, accounted for \$1.0 billion in operating revenues in 2002." Their categories are theatre, musical theatre, opera, dinner theatre, dance companies, musical groups and artists, and 'other' (e.g. circus, ice skating and magic shows).

Statistics Canada also reports 44% of Internet households reported downloading music in 2000 (Canada: A Portrait, p. 110).

## **SECTOR OBSERVATIONS — *MUSIC AND SOUND RECORDING***

### ***SIGNIFICANT GAPS WHERE NO DATA ARE AVAILABLE:***

- live commercial music performances
- performing arts facilities
- festivals
- mechanical rights
- amateur activity
- contribution of volunteers
- distribution channels — retail stores, radio, TV, Internet

\* Also see the general notes regarding Statistics Canada sources at the end of the document.

## ***SECTOR ESTIMATES***

There are hundreds of small independent record producers which are not in the Statistics Canada data, suggesting there may be 1000 'labels' many producing only one title per year. The sound recording industry represents 17,000 jobs in 1998 including labels, manufacturers, retailers, performers, and studios. Referencing IFPI, retail revenues from music were \$1.2 billion in 2000 — 2.2% of the world market. (CIRPA)

SOCAN reports it has over 70,000 Canadian composers, song-writers, lyricists and publishers on file of which 17,000 received payments in 2000 from domestic licence fees. SOCAN collected royalties totaling \$175 million of which they paid out about \$85 million to publishers and composers.

The Canadian Musical Reproduction Rights Agency records over 30,000 music publishers and copyright owners. The Société du Droit de Reproduction des Auteurs, Compositeurs et Éditeurs du Canada represents 4,000 members.

The Canada Council for the Arts reports '169 symphonies, choirs and operas' expending \$194 million in 1997.





## VISUAL ARTS AND CRAFTS

4

### STATISTICS CANADA DATA — VISUAL ARTS AND CRAFTS<sup>29</sup>

<i>Labour Force, 2001</i> <sup>30</sup> —	<b>161,840</b> (27,000 were painters, sculptors, artisans, craftspersons or photographers); self-employed: <b>29%</b>
<i>Labour Force Trends</i> —	<b>29%</b> growth from 1991–2001
<i>Earned Income</i> —	average: <b>\$27,553</b> ; total employment earnings: <b>\$4.5 billion</b>
<i>Adult Participation</i> —	<b>22%</b> go to a public art gallery; <b>9%</b> go to a commercial art gallery; <b>17%</b> do visual arts and <b>32%</b> do crafts in their leisure.
<i>Household Annual Spending</i> —	<b>\$1 billion: \$532 million</b> on original works of art; <b>\$499 million</b> on purchase of art supplies and crafts materials (plus a share of admissions to art galleries reported under Heritage above).
<i>Direct Government Spending</i> <sup>31</sup> —	<b>\$68 million</b>
<i>Exports</i> <sup>32</sup> —	<b>\$77 million</b> : \$57 million of original works of art; \$20 million for prints, posters, etc. in 2002 (down from a high of \$104 million in 2000).

<i>Organizations</i>	No.	Revenue \$million	Public Funding \$million	Employees <sup>33</sup>	Attendance
					million
<i>Public Art Galleries</i> <sup>34</sup>					
1999	185	196	114	2,973	6.1
1995	186	177	114	2,493	5.8

<sup>29</sup> Work involving: architects, architecture technicians, painters and sculptors, artisans and craftspersons, patternmakers in textile, leather and fur products, graphic designers and illustrating artists, graphic arts technicians, industrial and interior designers, landscape architects, photographers, photographic and film processors, and pre-press occupations.

<sup>30</sup> Detail for the occupations included from the Census is provided in Appendix A.

<sup>31</sup> Excludes grants to public art galleries which are included under Heritage.

<sup>32</sup> Excludes crafts.

<sup>33</sup> Includes full-time, part-time.

<sup>34</sup> These figures are included under Heritage.



## **STATISTICS CANADA SURVEY NOTES\* — VISUAL ARTS AND CRAFTS**

The public art gallery data from Statistics Canada is taken from the 'survey of heritage institutions' a census of non-profit heritage institutions which include museums, art galleries, historic sites, conservation areas, zoos, nature parks, and related institutions. It was first conducted in 1938, and annually or biennially since 1970. It is currently biennial.

### ***SECTOR OBSERVATIONS — VISUAL ARTS AND CRAFTS***

Significant gaps where no data are available:

- commercial art galleries
- craft retail and fairs
- the craft 'business'
- craft exports

### ***SECTOR ESTIMATES***

A study coordinated by DFAIT in 1991 cites a study reporting craft sales from Quebec to the U.S. were \$218 million. This contrasts with the Statistics Canada export figures for this sector. (The study also notes that in the U.S., craft activity reflects US\$13.8 billion.)

A study done for The Canadian Crafts Federation and Fédération canadienne des métiers d'art reports "craft activities are estimated to support some 22,600 individuals, generating total output valued at \$727 million, and exports approaching \$100 million annually."

---

\* Also see the general notes regarding Statistics Canada sources at the end of the document.

# WRITING AND PUBLISHING

5

## STATISTICS CANADA DATA — WRITING AND PUBLISHING<sup>35</sup>

<i>Labour Force, 2001</i> <sup>36</sup> —	<b>160,215</b> ; self-employed: <b>14%</b>
<i>Labour Force Trends</i> —	<b>10%</b> growth from 1991–2001
<i>Earned Income</i> —	average: <b>\$33,420</b> ; total employment earnings: <b>\$5.4 billion</b>
<i>Adult Participation</i> —	<b>61%</b> read books ( <b>41%</b> at least one book per month); <b>71%</b> read magazines; <b>82%</b> read newspapers; <b>10%</b> write poetry, short stories...
<i>Household Spending</i> —	<b>\$1.1 billion</b> purchasing books; <sup>37</sup> <b>\$104 million</b> on library fees, duplicating costs; <b>\$682 million</b> purchasing magazines; <b>\$1.2 billion</b> purchasing newspapers.
<i>Direct Government Spending</i> —	<b>\$198 million</b> ('Literary arts') of which \$175 million is federal.
<i>Exports</i> —	<b>\$1.2 billion</b> (\$484 million for books, \$228 for magazines and periodicals and \$490 million for 'other') in 2002, doubling since 1996.

### Organizations<sup>38</sup>

	No.	Revenue \$million	Public Funding \$million	Employees <sup>39</sup>	Titles
<i>Book Publishers and Exclusive Agents</i>					
2000	672	2,400	43.3	10,273	15,744
1996	549	2,000	32.8	8,474	11,356
<i>Periodical Publishers</i>					
1998	746	1,268	9.3	8,264	2,027

<sup>35</sup> Work involving: writers, editors, journalists, binding and finishing machine operators, printing machine operators, printing press operators, translators, typesetters, professional occupations in public relations, and correspondence clerks.

<sup>36</sup> Detail for the occupations included from the Census is provided in Appendix A.

<sup>37</sup> Excludes text books.

<sup>38</sup> Libraries are included under Heritage.

<sup>39</sup> Includes full-time, part-time.

## **STATISTICS CANADA SURVEY NOTES\* — *WRITING AND PUBLISHING***

Writing and Publishing for Statistics Canada classifications typically includes writing and publishing of all types: books, magazines, newspapers, advertising copy, corporate annual reports, technical manuals, etc. This is an important consideration for data on the labour force, and for economic impact estimates of publishing. The survey of book publishing includes elementary and high school text books and reference books as well as Trade books.

The Statistics Canada Survey of Book Publishers and Exclusive Agents covers all “book publishers who have titles in print and exclusive agents who sold titles published by another firm.” (Prior to 1996 firms had to have revenues exceeding \$50,000.) This is a biennial survey, first carried out in 1972.

The Periodical Publishing Survey covers “all known periodicals published in Canada,” and dates back to 1975. For 1998–99, 2,027 periodical titles were covered with a 94% responding. Information for the non-respondents was imputed (estimated).

Statistics Canada also reports that 27% of the households making Internet pur-

chases reported buying books, newspapers or magazines online — the most prevalent type of purchase.

Figures reported by the Ontario Arts Council imply that the writing and publishing industries represented a direct and indirect economic impact of nearly \$10 billion for 1996. (This same source implies a total economic impact of about 960,000 jobs for the culture sector overall — a figure noticeably higher than recent estimates.) (ArtFacts, 6:1)

## **SECTOR OBSERVATIONS — *WRITING AND PUBLISHING***

### ***SIGNIFICANT GAPS WHERE NO DATA ARE AVAILABLE:***

- total book market (e.g. Internet sales, used bookstores, mail order clubs)
- purchasing habits
- library use
- Internet use

### ***SECTOR ESTIMATES***

The retail book market in Canada has been estimated at \$4 billion (Lorimer).

The Canadian Publishers Council’s members pay out about \$25 million annually in writers’ royalties.

The Cultural Careers Council in Ontario cites writing and publishing as responsible for 40,000 jobs in Ontario (and a national economic impact of \$2.9 billion). ACP cites Canadian-owned publishers employing 9,000 people directly, resulting in an economic impact of just over \$1 billion.

\* Also see the general notes regarding Statistics Canada sources at the end of the document.

## GENERAL SURVEYS WITH CULTURE-RELATED COMPONENTS

### *GOVERNMENT AND HOUSEHOLDS*

- The 'survey of government expenditures on culture' covers all federal and all provincial and territorial departments and agencies, responsible for support of arts and culture (29 federal and 180 provincial/territorial departments and agencies with culture-related expenses). Limited data on municipal expenditures is extracted from a sample of municipalities. The survey is annual and was first conducted in 1982. The latest data are 2001–02. (It can be difficult for government departments to provide culture-specific figures.) The overall total double counts inter-government transfers of about \$400 million.
- The 'general social survey' has been conducted every year since 1985 to monitor social trends. It is now a sample survey of about 25,000, although it was only 10,000 prior to 1999 which had limited sub-population breakdowns (e.g. by province, by ethnic group). The theme for 1992 and 1998 was leisure time and a battery of questions on cultural participation were a component of the questionnaire. No repetition of these culture questions is currently planned.
- The 'survey of household spending' began in 1997 merging two previous surveys, the Family Expenditures Survey and the Household Facilities and Equipment Survey. It collects an extremely detailed account of household spending and equipment, some of which is spending on reading materials, admissions to museums and performing arts, purchase of arts and crafts supplies, of musical instruments, cable services, Internet services, sound equipment, library fees, and so on. It samples 20,000 households and is conducted

biennially. The latest data are for 2002 when the response rate was 70%. Missing values are imputed.

### *LABOUR FORCE*

In addition to employment figures available from the institutional surveys, broad culture labour force data are also available from:

- The Census is conducted every five years (2001 and 2006 for information about the previous year). It covers every person in Canada for basic demographic information and asks a sample of one-fifth more detailed information including employment and housing. Employment information is classified in terms of the persons primary job the week preceding the survey (typically around the first of June). The size of this sample is large enough to provide quite small breakdowns of information into detailed occupation groups or geographic regions. Data from the 2001 Census are now available.
- The Labour Force Survey is renowned as the source of the monthly unemployment estimates. It has been used over the last few years to develop estimates of the culture labour force on an annual

basis and has been the source of several articles in “Focus on Culture.” Although it has a large sample size (over 50,000 households), the reliability of the estimates for culture occupations is limited, as is the occupational breakdowns available, and its numbers typically, and predictably, differ from Census estimates. Data from the Labour Force Survey are not cited in this report.

- The Culture Labour Force Survey was a one-time survey addressing a population of about 150,000 people identified as working in creative cultural occupations (visual artists, actors, musicians, etc.) to explore their working conditions, education and training, income and finances. The sample size was just over 5,000. This is the only national study covering those working full- or part-time in cultural occupations; it asked questions specifically of interest to assessing careers in culture. Amongst other things it provided much higher estimates of self-employment than does the Census. It was carried out in 1994–95.

Statistics Canada also carried out surveys of individual cultural occupations in the late 1970s and early 1980s, which have not been repeated since and are the only source of culture-occupation specific information.

## **OTHER TOPICS**

There are a number of other Statistics Canada surveys that include culture-sector related material. They include the Annual Cable Television Survey, the Radio-Listening Data Bank, the Television-Viewing Data Bank, the Radio and Television Broadcasting Survey, the Canadian Travel Survey, the Household Internet Use Survey, the Survey of Self-Employment, and, the Annual Survey of Arts, Entertainment and Recreation Services.

## **GENERAL CONSIDERATIONS IN USING THE STATISTICS CANADA DATA**

The data relating to culture from Statistics Canada are often *not* collected on a clear or consistent basis across all surveys. For example, questions about employment may (a) not be asked on some surveys; (b) be asked but in different ways (full-time only, full-time equivalents, with or without contractors/freelancers); and (c) may or may not include volunteers. The wording of questions may be either different or imprecise — e.g., is it an art gallery or a commercial art gallery or a shopping mall print and poster shop? Is it a children’s play or a professional performance? Is it a *Canadian* book or film? For publishing, information is collected on book publishing companies, but for periodicals, information on individual periodical is collected.

A key gap in representing the scale of cultural activity relates to the labour force, where the prime information collection instruments, the Census and the Labour Force Survey do not capture information on secondary work. In addition, both who is counted as a worker and who is counted as being in a culture occupation varies from source to source.

Thus the data available are indicators of activity, not clear cut units that can be added together or compared easily, nor do they accurately describe the total situation.



## NEEDS AND OTHER SOURCES

# 7

As can be seen from the data, the survey sources available from Statistics Canada are indicators of what is going on for some elements of the culture sector, but do not account for all that is going on in the sector. Many surveys have specific targets (e.g. non-profit, professional performing arts groups) and do not try to reflect the whole gamut of related activities. These are touched on only in the broad based Statistics Canada surveys, such as the Census, the General Social Surveys on leisure activities, the survey of households spending, and the labour force survey.

In other areas where culture has been addressed in more detail, these have been one-time surveys and need to be repeated on a regular basis — the culture labour force survey, the surveys of time use — or are part of series which were incomplete or not repeated (the series of surveys of artists which was initiated in the late 1970s).

In general the sector calls upon the Statistics Canada and in most cases considers them adequately reflective of the activity of the sector which they measure.

Three key areas of concern are:

- comprehensive culture labour force characteristics, given many people who work at culture are not in the official statistics;
- leisure time participation data, where sector perceptions are that much activity is not being accurately reflected;
- data on the many culture areas not yet surveyed by Statistics Canada.



## APPENDIX A — CENSUS DATA ON CULTURAL SECTOR OCCUPATIONS, 1991 AND 2001

Cultural sector occupations	1991	2001	Percent growth	Self-employed	Average earnings
<b>A/V AND LIVE PERFORMING ARTS</b>					
Actors	5,195	10,765	107%	35%	\$21,597
Announcers and other broadcasters	9,360	8,915	-5%	11%	\$30,505
Broadcast technicians	3,335	3,155	-5%	3%	\$39,501
Dancers	4,190	6,865	64%	30%	\$14,587
Film and video camera operators	2,960	4,480	51%	14%	\$35,698
Managers in publishing, motion pictures, broadcasting and performing arts	12,300	12,020	-2%	10%	\$51,216
Other performers	3,280	4,570	39%	25%	\$18,156
Other technical occupations in motion pictures, broadcasting and the performing arts	5,865	9,110	55%	13%	\$33,888
Producers, directors, choreographers and related occupations	12,860	19,240	50%	19%	\$43,111
Support and assisting occupations in motion pictures, broadcasting and the performing arts	3,410	8,125	138%	8%	\$25,953
Theatre, fashion, exhibit and other creative designers	9,110	10,090	11%	22%	\$27,205
<b>Total A/V and Live Performing Arts</b>	<b>71,865</b>	<b>97,335</b>	<b>35%</b>	<b>18%</b>	<b>\$32,992</b>
<b>HERITAGE</b>					
Archivists	1,525	2,350	54%	0%	\$30,480
Conservators and curators	1,460	2,410	65%	13%	\$34,041
Librarians	13,175	12,135	-8%	0%	\$35,564
Library and archive technicians and assistants	17,550	15,610	-11%	1%	\$23,935
Library clerks	14,970	12,280	-18%	0%	\$14,179
Library, archive, museum and art gallery managers	3,850	4,285	11%	4%	\$44,186
Technical occupations related to museums and galleries	4,180	5,135	23%	9%	\$16,535
<b>Total Heritage</b>	<b>56,710</b>	<b>54,205</b>	<b>-4%</b>	<b>2%</b>	<b>\$25,961</b>



<b>Cultural sector occupations</b>	<b>1991</b>	<b>2001</b>	<b>Percent growth</b>	<b>Self-employed</b>	<b>Average earnings</b>
<b>MUSIC AND SOUND RECORDING</b>					
Audio and video recording technicians	5,800	9,080	57%	20%	\$30,632
Conductors, composers and arrangers	1,875	2,290	22%	39%	\$27,381
Musicians and singers	26,165	31,000	18%	56%	\$16,090
<b>Total Music and Sound Recording</b>	<b>33,840</b>	<b>42,370</b>	<b>25%</b>	<b>47%</b>	<b>\$19,816</b>
<b>VISUAL ARTS AND CRAFTS</b>					
Architects	9,260	12,990	40%	23%	\$52,592
Architectural technologists and technicians	4,795	6,290	31%	10%	\$34,960
Artisans and craftspersons	21,860	19,575	-10%	50%	\$15,533
Camera, platemaking and other pre-press occupations	6,260	5,465	-13%	2%	\$31,533
Graphic arts technicians	7,005	8,390	20%	18%	\$25,411
Graphic designers and illustrating artists	28,740	45,180	57%	22%	\$30,186
Industrial designers	3,480	9,955	186%	12%	\$40,469
Interior designers	7,655	11,645	52%	31%	\$29,808
Landscape architects	2,100	2,380	13%	21%	\$41,626
Painters, sculptors and other visual artists	10,990	15,250	39%	67%	\$18,666
Patternmakers, textile, leather and fur products	1,630	2,535	56%	16%	\$25,789
Photographers	10,540	11,955	13%	41%	\$25,407
Photographic and film processors	11,560	10,230	-12%	3%	\$17,769
<b>Total Visual Arts and Crafts</b>	<b>125,875</b>	<b>161,840</b>	<b>29%</b>	<b>29%</b>	<b>\$27,553</b>

<b>Cultural sector occupations</b>	<b>1991</b>	<b>2001</b>	<b>Percent growth</b>	<b>Self-employed</b>	<b>Average earnings</b>
<b>WRITING AND PUBLISHING</b>					
Binding and finishing machine operators	10,280	10,090	-2%	1%	\$23,129
Correspondence, publication and related clerks	7,990	7,595	-5%	7%	\$26,066
Editors	6,880	12,865	87%	14%	\$36,637
Journalists	13,675	13,380	-2%	14%	\$37,473
Printing machine operators	39,135	15,120	-61%	4%	\$27,336
Printing press operators		24,720		2%	\$36,654
Professional occupations in public relations and communications	24,240	28,390	17%	9%	\$37,618
Supervisors, printing and related occupations	9,090	6,785	-25%	4%	\$42,218
Translators, terminologists and interpreters	9,780	14,215	45%	32%	\$31,500
Typesetters and related occupations	8,890	5,910	-34%	10%	\$26,043
Writers	15,190	21,145	39%	45%	\$31,911
<b>Total Writing and Publishing</b>	<b>145,150</b>	<b>160,215</b>	<b>10%</b>	<b>14%</b>	<b>\$33,420</b>
<b>Totals</b>	<b>433,440</b>	<b>515,965</b>	<b>19%</b>	<b>21%</b>	<b>\$29,951</b>

Source: Data derived from "Canada's Cultural Sector Labour Force," prepared by Hill Strategies for The Cultural Human Resources Council, 2004.





## APPENDIX B — SOURCES

Advisory Committee on a Cultural Industries Sectoral Strategy. “The Business of Culture”. Ministry of Culture, Tourism and Recreation (Ontario). 1994.

AECB — Association for the Export of Canadian Books Web site.

Canada Council for the Arts Web site.

CCA — Canadian Conference of the Arts Web site.

CCF — Canadian Crafts Federation Web site.

CFTPA — Canadian Film and Television Producers Association Web site.

CIRA — Canadian Independent Record Producers Association Web site.

CLA — Canadian Library Association Web site.

CMA — Canadian Museums Association Web site.

CPC — Canadian Publishing Council Web site.

CRIA — Canadian Recording Industry Association Web site.

Cheney, Terry. “The Art of the Future”. *Focus on Culture*, (9,2). 1997.

Cheney, Terry. “Arts and Heritage Participation in the Internet Age”. For the Department of Canadian Heritage. 2000.

Cheney, Terry. “Perspectives on Training in the Culture Sector: Drawing Implications from the 1993 Cultural Labour

Force Survey”. For the Cultural Human Resources Council, 1996.

Culture Careers Council Ontario Web site, especially the ‘Working in Culture primer’.

Department of Canadian Heritage. “2000–2001 Book Publishing Industry Activity Report,” especially Section III ‘Overview of the Canadian Book Publishing Industry.’

Department of Foreign Affairs and International Trade. “Study of the Craft Sector in Canada”. Louise Chapados, coordinator. 2001 Available at: [http://www.dfait-maeci.gc.ca/arts/crafts-en.asp#\\_Toc514590900](http://www.dfait-maeci.gc.ca/arts/crafts-en.asp#_Toc514590900)

“Economic and Employment Impact of the Arts and Culture Sector in Ontario”. *ArtFacts* (Ontario Arts Council), 6:1. 2002.

Hill Strategies Research Inc. “Arts and Culture Volunteers in Canada”, November, 2003.

Hill Strategies Research Inc. “Canada’s Cultural Labour Force”. Cultural Human Resources Council. 2004.

Lorimer, Rowland. “The state of the industry [book publishing] and recent policy”. [www.er.uqam.ca/nobel/gri-cis/actes/utopie/Lorimer.pdf](http://www.er.uqam.ca/nobel/gri-cis/actes/utopie/Lorimer.pdf)

Nordicity Group Ltd. "Profile 2004: An Economic Report on the Canadian Film and Television Production Industry". For CFTPA, 2004.

Organization of Book Publishers of Ontario Web site.

Pereboom, Bert. "Profile and Development Strategy for Craft in Canada". For the CCF and FCMA. 2003.

Schrader, Alvin M. and Michael R. Brundin. "National Core Library Statistics Program Statistical Report, 1999: Cultural and Economic Impact of Libraries on Canada". National Library of Canada. 2002.

SOCAN — Society of Composers, Authors and Music Publishers Web site.

"Sound Recording Market Profile". CRIA Web site.

Statistics Canada. "Arts, entertainment and recreation services", The Daily, April 30, 2004.

Statistics Canada. *Canada: A Portrait*. 2002.

Statistics Canada. Census, 2001.

Statistics Canada. Census, 1991.

Statistics Canada. "Culture sector labour force: Has the 1990s boom turned to bust?" Michel Durand, Focus on Culture, 14:3.

Statistics Canada. "E-commerce: Household shopping on the Internet", The Daily, December 11, 2003.

Statistics Canada. Focus on Culture.

Statistics Canada. General Social Survey, 1992.

Statistics Canada. General Social Survey, 1998.

Statistics Canada. "Government expenditures on culture". The Daily, January 7, 2004.

Statistics Canada. "Health and Vitality of the Culture Sector in...." (prepared for a number of geographic areas on a proprietary basis). Michel Durand. 1997.

Statistics Canada. "International trade in culture goods". The Daily, July 9, 2003.

Statistics Canada. "Patterns in Culture Consumption and Participation". Ogrodnik, Lucie for the Canada Council for the Arts. Available on the Canada Council for the Arts' Web site. 2000.

Statistics Canada. "Profile of Libraries in Canada." Isme Alam. Focus on Culture, 11:3.

Statistics Canada. Survey of Household Spending.

Statistics Canada. 87-007-XIE. "Summary table: Value of international trade in culture goods, Canada, 1996 to 2002.

Statistics Canada. 87-211-XPB: Canadian Culture in Perspective: A Statistical Overview — 2000 Edition.

Statistics Canada. 87F0001XIE: Government Expenditures on Culture.

Statistics Canada. 87F0002XIE: Survey of Heritage Institutions.

Statistics Canada. 87F003XIE: Performing Arts Survey.

Statistics Canada. 87F0004XIE: Survey of Book Publishers and Exclusive Agents.

Statistics Canada. 87F0005XIE: Periodical Publishing Survey.

Statistics Canada. 87F0007XDB: Cultural Trade and Investment Project.

Statistics Canada. 87F0008XIE: Sound Recording Survey.

Statistics Canada. 87F0009XPB: Motion Picture Theatres Survey.

Statistics Canada. 87-010-XIE2003002.XLS: Film, Video and Audio-visual Production Survey.