

Quarterly Bulletin from the Culture Statistics Program

Catalogue no. 87-004-XIE

Vol. 14, No. 4

Filming on the edge: The film industries in British Columbia and Nova Scotia

By David Coish

With Toronto standing in for Chicago in the film of the same name, and Vancouver looking gritty in Da Vinci's Inquest, Canadian cities and landmarks are now familiar sites on big and small screens. In particular, viewers are able to spot British Columbia with regularity; the province has been the leading recipient in Canada of foreign film production spending in recent years, receiving \$830 million, or 44%, of the Canadian total in 2002. This is far more than the 30% share of foreign film production dollars received by Ontario, British Columbia's closest rival.

The market share of film producers headquartered in British Columbia had also grown until 1999, at the expense of production companies in Quebec and Ontario, which had long dominated this segment of the industry (together, they accounted for 73% of national film production revenue in 1999). Domestic film production revenues in British Columbia rose 215% to \$291 million in 1999, after growing 55% the previous year. (Table 5) The province's share of Canada's domestic film production revenues in 1999 (19%) was more than double its share in 1998 (7%), while its share of domestic export revenue rose four-fold to almost one-third (31%) in 1999. (Tables 2 and 5) Part of this success stemmed from movies such as the Academy-award winning *Gods and Monsters* from Lion's Gate Films and television series such as *Da Vinci's Inquest*¹.

In 2000 and 2001, however, film producers in British Columbia ran into some hard times. Domestic production revenues fell 29% between 1999 and 2001, partly because several British Columbia film producers went out of business during that period. Provincial statistics from British Columbia also reveal a rapidly growing film

1. *Haddock Entertainment web site* www.haddockentertainment.com and *Lion's Gate Films web site* www.lionsgatefilm.com.

In This Issue...

Articles:

- Filming on the edge: The film industries in British Columbia and Nova Scotia 1
- How do people around the world use their leisure time? 8

Profiles of Canada's culture trade:

- The Canada-Cuba Social Club 14

Data update:

- Culture sector employment, 1991-2003 15

Provincial and territorial data:

- Government expenditures on culture, 2001-2002 17

Did you know?

- New data on film, video and audio-video distribution 19

industry until 2000. In 2001 and 2002, however, overall production expenditures declined 6% and 10%, respectively, the result of decreased activity by domestic companies. In 2002, production spending by domestic film companies fell 35% from 2001. By contrast, spending by the foreign production sector fell only 3%, contributing over four-fifths of every film production dollar spent in British Columbia in 2002 (Table 1).

During the latter part of the 1990s Nova Scotia emerged as another presence in the Canadian film industry, in both foreign and domestic productions. In 2002, Nova Scotia received 3% of foreign film production spending in Canada,² 3% of all domestic film production revenues in 2001,³ and 7% of Canadian Television Fund allocations in 2001. According to the Nova Scotia Film Development Corporation (NSFDC), film production dollars spent in the province reached an all-time high of \$137 million in 2001. By 2002, however, revenues had dropped to \$120 million. Unlike British Columbia, Canadian producers

(including broadcasters producing in-house) accounted for over half (57%) of Nova Scotia's film production expenditures (Table 2). Television programs such as *This Hour Has 22 Minutes*, *Trailer Park Boys*, *Made in Canada*, *Blackfly*, *Pit Pony* and *Theodore Tugboat* illustrate the range and strength of Canadian television programming in Nova Scotia.⁴

Data for *revenue earned* by Canadian film producers, distributors, and post-production operations originate from Statistics Canada's Culture Statistics Program.

Domestic and foreign *film production expenditures* data are collected by each province and territory. The Department of Canadian Heritage compiles foreign production expenditures from the provincial/territorial data.

The data sources are conceptually different and are not comparable.

Film production activity is influenced by diverse factors

A variety of factors influence the amount and location of film production activity carried out by

both domestic and foreign producers. The availability of financing, including development loans, tax credits, and venture capital all affect decisions on whether to undertake production in a particular location. The decision by foreign producers to shoot in Canada is partly influenced by the availability of tax credits and the value of the Canadian dollar. Both domestic and foreign producers bear in mind ease-of-filming considerations such as access, regulations, supply of qualified labour, and other related factors. Depending upon the production and its requirements, one or another of these factors may take precedence. Other countries also eagerly compete to lure filming to their regions. In the end, a favourable combination of factors often tips the balance as to where productions are filmed.

2. *Provincial and territorial government data compiled by Department of Canadian Heritage.*
3. *Film, Video and Audio-visual Production Survey, Statistics Canada.*
4. *Nova Scotia Film Development Corporation, web site www.film.ns.ca.*

Table 1
Total production spending in Nova Scotia reached an all-time high in 2001-02

Film production expenditures in N.S. (\$000,000)	1995	1996	1997/ 1998	1998/ 1999	1999/ 2000	2000/ 2001	2001/ 2002	2002/ 2003	% change from 2001/2002 to 2002/2003
Nova Scotia companies	17	43	93	90	70	65	89	68	-24
Non-Nova Scotia companies	15	4	5	30	60	35	48	52	8
Total film production in N.S.	32	48	98	119	130	100	137	120	-12
N.S. Share (%)	53	91	94	75	54	65	65	57	

Note: In 1997, Nova Scotia began reporting on a fiscal year basis.
Source: Annual Report 2001-2002, Nova Scotia Film Development Corporation.

Film production expenditures in B.C. (\$000,000)	1995	1996	1997	1998	1999	2000	2001	2002	% change from 2001 to 2002
Canadian companies	114	175	206	363	406	419	252	164	-35
Foreign companies	319	362	425	445	664	761	857	830	-3
Total film production in B.C.	433	537	631	808	1,070	1,180	1,109	994	-10
Domestic Share (%)	26	33	33	45	38	36	23	16	

Source: Annual Report 2002, British Columbia Film.

Table 2
British Columbia earned 44% of Canada's foreign location production spending in 2002...

Foreign location production spending	1996	1997	1998	1999	2000	2001	2002
	\$ (000,000)						
British Columbia	362	425	445	664	760	857	830
Nova Scotia	4	5	18	60	35	48	52
Canada	768	819	1,095	1,506	1,762	1,760	1,896

Source: Department of Canadian Heritage, *The Canadian Film and Television Production Industry Profile 2002*, and *British Columbia Film Commission Factsheet*, 2003.

... but only 12% of Canada's domestic production revenue in 2001

Production revenue earned by domestic producers	1995	1996	1997	1998	1999	2000	2001
	\$ (000,000)						
British Columbia	51	47	60	93	291	224	207
Nova Scotia	7	17	25	38	71	42	49
Canada	879	967	1,135	1,274	1,561	1,468	1,673

Source: Statistics Canada, *Cultural Statistics Program*.

As of late, increasing pressure from U.S. sources to limit "offshore productions," or filming by U.S. firms outside of the United States, is weighing heavily on the Canadian film industry. For example, megastar and now California Governor Arnold Schwarzenegger refused to film *Terminator 3* in Canada,⁵ while Chicago Mayor Daley has publicly stated his concern about the filming of the movie *Chicago* in Canada and the concomitant loss of film production revenue for that city.⁶ Film lobby groups have sprung up in the United States to fight the perceived loss of jobs and business from foreign location shooting. Some states have tried to entice film production with legislated fiscal changes, such as their own film tax credits, that would allow them to compete more successfully against Canadian federal and provincial tax credits.

Both provincial and federal governments offer financial incentives and other support for existing and developing film production industries. Incentives range from grants and tax credits to training, equity

investments and travel subsidies. Most provinces offer tax credits to domestic and foreign producers. Governments also support the film industry through film policies and by providing assistance to educational institutions that offer film programs. However, the value of tax credits and other programs supporting the film production industry are not uniform across provinces. Nova Scotia and British Columbia count themselves among the frontrunners in terms of provincial government support for the film production industry.

British Columbia has been in the film business for 25 years

Efforts to create or nurture a film industry in British Columbia have a long history of provincial government support. The British Columbia Film Commission (BCFC) was created in 1978 to stimulate the film industry by promoting British Columbia locations. From its early focus on marketing the province's natural attributes, its proximity to California, its shared time zone with Hollywood, and a favourable exchange rate, BCFC's approach has evolved. Now it

promotes a wide-ranging service industry, including the post-production sector.⁷

Another provincial agency, British Columbia Film, was established in 1987 to provide financial support for domestic film and television production, primarily in the form of equity financing. Over time, provincial government initiatives became more comprehensive, so that they now provide "one-stop" shopping for film producers, guiding them through the various steps of film production. From providing development loans to lists of provincial post-production facilities, the provincial government has been an active fiscal partner in the development of British Columbia's film industry.

Nova Scotia's burgeoning support for film

On the other coast, the Nova Scotia government has supported the film industry since 1990, when the Nova Scotia Film Development Corporation (NSFDC) was established. Since then, the corporation has created a number of programs to "grow the film and video industry in Nova Scotia by stimulating investment and employment and by promoting Nova Scotia's locations, skills and creativity in global markets."⁸ Support includes direct investment in film projects and in infrastructure such as sound stages and animation facilities.

5. "Celluloid softwood: Once American filmmakers clamoured to shoot in Canada. Now the industry resents the U.S. jobs lost," *National Post*, Nov. 12, 2002.
6. "Film tax breaks rise despite U.S. anger," *The Globe and Mail*, Feb. 19, 2003.
7. "The Myth of Hollywood North," Report on Business Magazine, April 2001, p.96-101.
8. Nova Scotia Film Development Corporation web site, www.film.ns.ca.

The NSFDC assists and promotes the development of the private-sector film and video industry in Nova Scotia in the areas of funding, marketing, promotion, training and education. It also administers a tax credit program started in 1995. Other financial support programs include equity investments, development loans, special project awards, training assistance, travel/marketing assistance, and new media development loans and equity investments. The NSFDC's Location Department promotes the province as a place to film (for co-productions or fully financed foreign films).

Others eager to compete

Tax credits have likely played a major role in helping the British Columbia and Nova Scotia film industries, but in recent years lucrative fiscal

incentives have sprung up in other provinces, as well as in other countries. For example, New Brunswick provides a tax credit of 40% of total eligible labour expenses, as long as 25% of wages are paid to local residents. The province of Quebec provides tax credits of 33% of total eligible labour expenses, and the amount is even greater if filming occurs outside the Montreal region, and/or for certain French language feature films and documentaries. Similarly, in Australia, any production can claim a rebate of 12.5% of all expenditures, if the Australian share of production spending is greater than \$9 million and at least 70% of the budget.⁹

Marketing is key

Another key focus for the two coastal provinces has been the provision of

industry information. BCFC has a very detailed web site providing industry information and assistance, such as maps, weather and road reports, and location information. The agency also has a *Production Guide* with tax incentive information, government regulations and agencies, film liaisons, labour information, studio information, production support services, and an industry contact list. Web site www.film.bc.ca is a linked database of film locations, props, and talent with emphasis on independent film producers and film festivals. The site also provides links to film commissions, associations, societies, councils, and private sector production companies and studios in British Columbia.

The existence of this supportive infrastructure for over two decades has enabled the film industry in British Columbia to grow and mature. The province now has three studios and boasts of being the third largest film production centre in North America behind Los Angeles (Hollywood) and New York.¹⁰ Toronto, with its strong focus on domestic production, also asserts that it is the third largest centre.

The NSFDC, like its British Columbia equivalents, has a very detailed web site, complemented by a glossy *Production Guide*. These emphasize not only scenery, but also provide lists of production companies, services, producers/personnel and other support or resources. Dissemination of information on their respective film production industries

Tax credits in the film industry

Nova Scotia's Film Tax Credit was created in 1995 and covers 30% of labour expenditures, to a maximum of 15% of total production costs for filming in Halifax. This rises to 35%, and up to a maximum of 17.5% of total production costs for locations outside of Halifax.

The British Columbia Production Services Tax Credit (PSTC), which was implemented in 1998, has no Canadian ownership or content requirements and is valued at 11% of accredited British Columbia labour costs. Production costs have to be above \$100,000 for a TV episode of less than 30 minutes, \$200,000 for a TV episode exceeding 30 minutes, or \$1,000,000 for any other production. Foreign producers can also take advantage of a Regional Production Tax Credit of 6% of eligible labour costs, and a new Digital Animation or Visual Effects (DAVE) tax credit of 15%.

There are three kinds of credits for domestic producers in British Columbia under the Film Incentive British Columbia (FIBC) tax credit program:

- a basic tax credit of 20% of qualified British Columbia labour costs;
- a regional credit of 12.5% of qualified British Columbia labour costs aimed to stimulate production outside of Vancouver; and
- a training credit of 30% of trainee salaries (or 3% of British Columbia labour costs) which helps to develop skilled workers for British Columbia's film industry.

Qualified British Columbia labour costs during a taxation year are capped at 48% of total production costs. A producer cannot claim both the PSTC and FIBC tax credits.

The federal tax credits include the Film or Video Production Services Tax Credit (FVPSTC) for foreign production companies, which was established in 1997. This credit recently rose from 11% of eligible labour costs to 16%. The Canadian Film or Video Production Tax Credit (CFVPTC) for domestic producers is valued at 25% of eligible labour costs. It was recently announced that limits on this credit would also rise.

9. "Have film, will travel," Screen International, No. 1399, page 12.

10. British Columbia Film Commission web site, www.bcfilmcommission.com.

appears to be a key strategy in developing the industry in both provinces.

Location, location, location

In addition to government-funded incentives, both provinces also offer a variety of cinescapes. British Columbia has provided urban grit in downtown Vancouver in Da Vinci's *Inquest* and impersonated the rugged Alaska coastline in *Insomnia*. With topography varying from the semi-arid interior to the rugged Rockies, and to both gentle and rugged coasts, many different types of location filming can be done in British Columbia.

Nova Scotia has the capacity to portray small-town Maine, the agricultural mid-west, a small to mid-sized New England town or city, or a sooty factory town. This chameleon-like ability to double as other locations is undoubtedly one of the keys to the success of the film industries in Nova Scotia. The ability of producers to find a wide range of settings, skills and services in one location helps draw film productions to Canada.

Geographic proximity and ease of access to the Hollywood and New York film establishments also benefit British Columbia and Nova Scotia. Vancouver and Halifax, like Montreal and Toronto, are regional airport hubs so it is cheaper to fly film crews into these centres than into St. John's or Saskatoon, for example. Of course, Toronto and Montreal are also vibrant production centres, which attract large numbers of local and foreign productions to their vicinities and are in direct competition with British Columbia and Nova Scotia.

Film and video programs in both provinces supply the industry with qualified workers

By 1999, the benefits to British Columbia of the provincial film tax credit introduced in 1998 and the federal tax credit in 1997 were apparent. Employment in the British Columbia film industry grew 71% in 1999, and peaked at 10,900 workers in 2000. The decline in the industry in 2001 and 2002 was visible with a drop in workers to 10,000 workers in

2002 (Table 3). In 1998, Nova Scotia had 600 full and part-time workers in the film production industry. Its film and video workforce also peaked in 2000 at 1400, more than double the previous year. Like British Columbia it fell in the next two years to 1100 in 2002.

Nationally, the number of workers employed in film and video industries¹¹ also grew sizeably in 1999 (47%) and continued to rise, although at a slower pace, through 2002,¹² resulting in smaller shares of Canadian film industry employment for British Columbia and Nova Scotia.

Both provincial governments have encouraged growth in their respective film industries by supporting education and training for film industry workers. In addition to the previously mentioned training tax credit, British Columbia offers professional development fellowships in producing, writing and marketing/distribution. In Nova Scotia, training and development programs offer support to young filmmakers and skill development for existing professionals. For example, in collaboration with the Canadian Broadcasting Corporation, the Bridge Award offers emerging young producers the opportunity to produce a half-hour or one hour production for broadcast. These provinces are not alone, however, in supporting young emerging talent. For example, the Société de développement des entreprises culturelles in Quebec offers a financial aid program to young producers, directors and screenwriters.

11. This industry group is comprised of establishments primarily engaged in producing and/or distributing motion pictures, videos, television programs or commercials, and providing post-production and related services.

12. Statistics Canada, Labour Force Survey.

Table 3
1999 was a pivotal year for employment in the film industry

Employment	1995	1996	1997	1998	1999	2000	2001	2002
Nova Scotia								
Total	0	500	0	600	1,300	1,400	1,200	1,100
Full-time	0	0	0	0	700	800	700	600
Part-time	0	0	0	0	600	600	500	500
British Columbia								
Total	6,700	6,300	6,200	5,500	9,400	10,900	9,400	10,000
Full-time	5,200	4,700	3,700	4,300	7,600	8,500	7,100	7,200
Part-time	1,600	1,600	2,600	0	1,800	2,400	2,300	2,800
Canada								
Total	25,500	26,600	31,000	28,700	42,200	42,500	43,700	51,100
Full-time	18,000	20,000	21,000	20,200	32,200	30,100	33,100	34,500
Part-time	7,500	6,600	10,000	8,500	10,000	12,400	10,600	16,600
Nova Scotia share of Canada								
%	0	2	0	2	3	3	3	2
British Columbia share of Canada								
%	26	24	20	19	22	26	22	20

Note: "0" indicates data lower than 500 for Nova Scotia and 1,500 for British Columbia
Source: Statistics Canada, Labour Force Survey.

Nova Scotia and British Columbia also offer specialized post-secondary programs, supplying the industry with trained entry-level staff. The Nova Scotia College of Art and Design (NSCAD) now offers a Bachelor of Fine Arts with a major in film production, while a Sound Technician Program is available at the Shelburne campus of the Nova Scotia Community College. Halifax is renowned for its concentration of universities, as well as being the epicentre of cultural life in the Maritimes; this provides an excellent breeding ground for an emerging film industry.

British Columbia also offers special training to film students with programs such as the Professional Film Studies at Capilano College, and the privately owned Vancouver Film School. Undoubtedly, a network of post-secondary institutions offering pertinent training is an essential part of the infrastructure needed to develop or grow a film industry.

Post-production and film distribution sectors not well developed on the coasts

Despite the resounding growth of the production sector, post production¹³ presents a somewhat different picture (Table 4). After relatively stable revenues from 1995 to 1998, British Columbia's post-production industry exhibited strength in 1999 with operating revenues surging 81% to \$58 million. However, in 2000, British Columbia's post-production operations earned just \$42 million and profit margins dipped to 12% from 15% the previous year. In 2001, both revenues and profit margins rebounded, but not back to 1999 levels. As a result, British Columbia post-production facilities have been earning a smaller share of national revenues in recent years, dropping

from 7% of the Canadian total in 1999 to 5% in 2001. The post-production sector in Nova Scotia is even smaller than that in British Columbia, earning \$3 million in 2001, just 0.3% of national post-production revenue in that year. This suggests that while many foreign production companies are taking advantage of tax credits for production, they are not availing themselves of local post-production facilities, perhaps because there is no fiscal incentive to do so.

Like post-production, the film distribution¹⁴ sectors in Nova Scotia and in British Columbia each capture a smaller share of the total national market than does the film production sector. Distributors in British Columbia earned \$26 million in operating revenue, or 0.9% of the \$3.0 billion earned nationally in 2001, while Nova Scotia's distributors earned \$6 million or just 0.2% of the national total. Ontario distributors dominate this sector of the industry, earning four fifths of all film distribution revenue.

The film distribution industry, unlike film production, is not subject to differential provincial tax credits. Therefore, pure market forces likely

motivate the location decisions of film distributors. The result is that most work is centred in the most populous areas, which have quick access to major markets and media outlets.

Most film activity is centred in larger urban areas

Like other provinces, most of the production companies and post-production facilities operating in British Columbia and Nova Scotia are located in the largest centres – Vancouver and Halifax. Even when filming occurs outside these centres, most other activities associated with the production are centred in the larger cities, providing little or no economic benefit to peripheral areas. Both provincial governments have reacted to this by offering larger tax credits for productions outside of Vancouver and Halifax.

13. Post production facilities are also called film and video laboratories. They perform activities such as film printing, film processing, film/video transfers, duplication, dubbing, subtitling, animation and audio post production.

14. Distribution includes all those engaged in film, video or audio-visual distribution including those engaged in the wholesale distribution of videocassettes and DVDs to other wholesalers or to retail outlets.

Table 4
Post-production and distribution revenues are not substantial

Operating revenues	1995/ 1996	1996/ 1997	1997/ 1998	1998/ 1999	1999/ 2000	2000/ 2001	2001/ 2002
	(\$000,000)						
Post-production							
British Columbia	29	30	22	32	58	42	47
Nova Scotia	1	1	1	2	2	3	2
Canada	484	507	598	721	869	876	915
Distribution							
British Columbia	..	..	13	11	11	18	26
Nova Scotia	..	..	4	5	8	8	6
Canada	..	..	1,808	2,226	2,457	2,782	3,010

.. not available for a specific reference period

Source: Statistics Canada, Film, Video and Audio-Visual Distribution and Videocassette Wholesaling Survey, and Film, Video and Audio-Visual Post-Production Survey.

However, other initiatives illustrate the difficulty of moving production away from the infrastructure available in the larger centres. For example, the Nova Scotia government funded the building of a Cape Breton sound stage but subsequently sold it, as it had never been commercially viable. Larger centres offer not only the technical facilities, but also accommodations, restaurants, catering and nightlife - considerations that play a role when producers select a film site.

British Columbia's film production industry is less concentrated, Nova Scotia remains dominated by a few

With continuing expansion in its domestic film production sector, British Columbia is no longer dominated by just one or two players. There are now a growing number of film producers and some of the smaller operations have become mid-to-large size producers. Nova Scotia, however, remains dominated by just a few firms. Fluctuations in the financial health of these firms have a large impact on how well the domestic industry performs as a whole. One of the challenges for Nova Scotia will be the development of a less concentrated industry. This point is brought home by the recent announcement that Alliance Atlantis will close its Nova Scotia subsidiary, Salter Street Films.

Table 5
Production revenues grew rapidly in 1999

	1995	1996	1997	1998	1999	2000	2001
Nova Scotia							
Number of producers	20	24	23	18	21	23	23
Full-time employees	41	45	54	80	104	106	76
Part-time and freelancers	50	258	236	61	65	40	129
Total employees	91	303	290	141	169	146	205
	(\$000,000)						
Salaries and wages	2	2	2	3	5	5	4
Benefits	0	0	0	0	0	0	0
Freelance fees	0	2	1	0	1	1	2
Production revenue	7	17	25	37	70	42	49
Total revenues	9	18	26	39	73	65	67
Exports	0	1	4	6	8	8	9
Profit margin (%)	6	8	2	6	6	14	-4
British Columbia							
Number of producers	81	76	79	84	106	96	92
Full-time employees	292	467	497	915	1,205	1,043	992
Part-time and freelancers	316	149	49	113	213	247	223
Freelancers	501	405	810	1,118	1,836	1,422	1,640
Total employees	1,109	1,021	1,356	2,146	3,254	2,712	2,855
	(\$000,000)						
Salaries and wages	14	24	20	30	56	50	45
Benefits	1	1	1	2	4	3	3
Freelance fees	5	6	16	12	33	24	27
Production revenue	51	47	60	92	291	224	207
Total revenues	54	55	111	175	419	359	366
Exports	7	8	14	38	206	170	155
Profit margin (%)	-6	-12	4	-1	1	0	-7
Canada							
Number of producers	616	626	702	637	733	717	728
Full-time employees	3,603	3,712	4,098	5,267	5,941	5,641	6,111
Part-time employees	2,286	2,486	3,633	4,686	4,009	5,413	5,058
Freelancers	10,571	12,625	13,528	20,694	22,963	25,558	26,011
Total employees	16,460	18,823	21,259	30,647	32,913	36,612	37,180
	(\$000,000)						
Salaries and wages	159	175	182	213	265	273	306
Benefits	16	14	16	19	22	27	32
Freelance fees	84	96	127	216	249	247	259
Production revenue	879	975	1,135	1,274	1,561	1,468	1,673
Total revenues	1,226	1,293	1,482	1,890	2,345	2,339	2,586
Exports	321	362	434	467	672	582	662
Profit margin (%)	5	7	7	7	5	3	1

Source: Statistics Canada, Film, Video and Audio-visual Production Survey.

American opposition to “offshore productions” and program changes/cuts among challenges ahead

Year-over-year growth in Gross Domestic Product¹⁵ for the Canadian motion picture and video production, distribution and post-production industries has slowed from 17% in 1999 to 5% in 2001.¹⁶ Whether this reflects a temporary slowdown remains to be seen. For any given province to attract foreign production in the future, pretty scenery and tax credits may not be enough. An increasing number of other countries are offering attractive tax credits. In addition, Telefilm Canada’s new funding focus on commercially viable films may make it more difficult for smaller domestic production houses to get funding. These factors, coupled with a protectionist stance by many in the U.S. film industry could spell leaner times for the Canadian film industry.

Countering this, however, is a recent increase from 11% to 16% in the federal Film or Video Production Services Tax Credit available to foreign film producers, and an increase in the base rate of qualifying labour expense for the Canadian Film or Video Production Tax Credit, from 48% to 60%.¹⁷ In addition, signs in British Columbia point to a rebound in the film industry; a number of big-budget foreign projects are to be produced in the province in 2003. Whether this recovery in foreign production will continue and spread to the domestic sector is difficult to assess.

For British Columbia and Nova Scotia, the existence of an infrastructure, an established track record for film production and strong or emerging domestic and foreign film production sectors may help them become even more competitive. Both provinces face threats, however, which could reduce the success they are facing in this highly volatile industry. Nova Scotia, with its focus on domestic television programming, may be hit harder by any change to the Canadian Television Fund while protectionist U.S. trade policies provide the greatest threat to British Columbia’s film industry. Both provinces, but especially Nova Scotia, are also vulnerable to closures of larger production houses. At a time when the film and video industries are providing the most popular entertainment products in the marketplace, the success or failure of Canada’s two coastal film communities may be bell weathers for the strength or weakness of the entire domestic film industry.

15. *Gross Domestic Product is defined in A User Guide to the Canadian System of National Accounts, page 18, as the “money value of goods and services produced within the geographical boundaries of Canada available for final domestic consumption, export or investment.”*

16. *Industry Measures and Analysis Division, Statistics Canada.*

17. *Canadian Audio-Visual Certification Office, Department of Canadian Heritage.*

David Coish is an analyst in the Culture Statistics Program. He is responsible for film production and film post-production surveys.

How do people around the world use their leisure time?

By Isme Alam

What do Canadians do in their spare time? Are their leisure activities similar to those of people in other countries? These appear to be simple questions. However, there are many issues and challenges involved in comparing leisure activities internationally. For comprehensive information on leisure participation, it is necessary to conduct special surveys. While many developed countries have conducted studies about leisure activities, the extent and quality of data available vary significantly from country to country. Even surveys that appear similar will examine different kinds of leisure activities or ask questions in dissimilar ways. For these and other reasons, cross-national data are not directly comparable without a great deal of effort and coordination.¹ The differences, for the most part, reflect the diverse cultural and artistic landscapes of each country. However, despite the scarcity of truly comparable international data, we can still paint a portrait of leisure activities separately for each country and then offer a glimpse of the common threads or differences.

1. G. Cushman, A.J. Veal and Jiri Zuznek (editors). 1996. *World Leisure Participation: Free Time in the Global Village*. Cambridge, U.K. CAB International, University Press. As the editors note in the introductory chapter: “Responses (to surveys) are affected by the differing definitions of leisure itself, the age-range of respondents included in surveys, the time of year when data are collected, and the participation ‘reference period’ used.” pp. 9-10.

Australia – lots of leisure ‘down under’?

Australia's 1997 Time Use Survey is a rich source of information on how Australians spend their time and the details of their activities.² In an average day in 1997, men spent 20% of their day on recreation and leisure, while women spent 18% of their day on leisure activity.

Radio and television

In 1997, 82% of Australian adults used some free time to listen to the radio or watch television. When Australians listened to the radio, most did so while involved in other activities. Although they spent only 8 minutes per day listening to the radio as a main activity in their free time, they spent a total of 80 minutes daily listening to radio while they did other things. Australians who watched television in their free time did so for an average of almost 2 hours each day. Men viewed half an hour more per day than women did.

Reading

Australians like to read for leisure. In 1997, 37% of Australian adults spent some of their free time reading.

Overall, women were slightly more likely to read than men were and the material they read differed. While men were more likely to read newspapers than books or magazines, the opposite was true for women. Older people tended to spend more leisure time reading than young people. For example, 65% of people aged 65 and over spent some of their free time reading, compared to 33% of those between 15 and 24 years of age.

Surfing the Net/computer games

From 1999 to 2000, the proportion of Australian households with home Internet access increased from 22% to 33%, while the proportion of households with home computers increased from 48% to 53%.³ The percentage of adults surfing the Net also rose steadily. In 2000, 47% of Australian adults used the Internet and they were most likely to do so at home. Home use climbed rapidly to 4 million adults in 2000, from 2.4 million in 1999 and 1.8 million in 1998. Another 1.1 million adults had Internet access at home but chose not use it there. The Internet was used primarily for research, leisure, shopping and browsing. The 1997 Time Use survey indicated that Australian men were twice as likely

(8%) as women (4%) to spend some of their free time using computers as a hobby or playing computer games.

Attending cultural/leisure venues

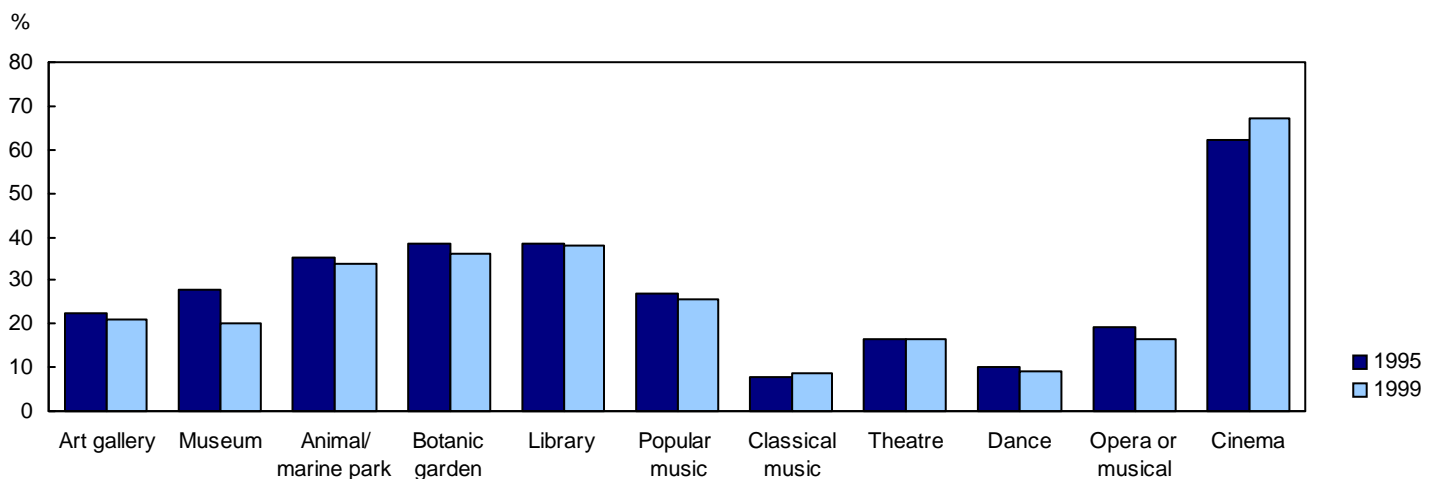
The 1999 Attendance to Cultural/Leisure Venues Survey⁴ indicates that, overall, there was a slight increase (2%) in Australians visiting cultural venues between 1995 and 1999. The greatest decreases in attendance rates occurred for museum visits and opera performances. Twenty-eight percent of the Australian population aged 15 and over visited a museum in 1995; by 1999, the proportion had dropped to 20%. The percentage of Australians who attended opera performances declined from 19% of the population in 1995 to 16% in 1999. Meanwhile, the proportion that attended classical music events rose from 8% in 1992 to 9% in 1999.

2. Australian Bureau of Statistics, 1997 Time Use Survey.

3. Australian Bureau of Statistics, Household Use of Internet Survey, 1999 and 2000.

4. Ibid. The Attendance to Cultural/Leisure Venues Survey 1999 provides information on the venues Australians (15 years and older) attended during the 12 months ending in April 1999.

Figure 1
Australians like to go to the movies



Source: Australian Bureau of Statistics, Attendance at selected cultural venues.

There were clear differences in attendance rates between men and women and among age groups. Women had higher attendance rates than men at most cultural venues, while men attended more spectator sports events. Cinemas were by far the most popular leisure venues, with 67% of Australians going to the movies at least once in 1999, while 17% of the population attended five or more classical music concerts.

For all entertainment venues except 'other performing arts',⁵ those living in the six capital cities attended more events than did people living in smaller centres. Individuals born overseas in English-speaking countries had higher attendance rates than those who were Australian-born. A higher proportion of employed persons attended cultural venues than did the unemployed. As well, part-time workers had higher attendance rates than full-time workers at culture and leisure venues.

Canadians – a leisured lot?

The 1998 General Social Survey (GSS)⁶ showed that Canadians (15 years of age and older) enjoyed, on average, 5.8 hours of leisure time daily,⁷ with men having about half an hour more free time than women. The largest proportion of Canadians' leisure time in 1998 (47%) was spent watching television and rented or purchased movies, reading books, magazines, and newspapers, and pursuing other passive leisure activities such as doing crafts and listening to radio. Socializing, including going to restaurants, accounted for 33% of leisure time. Active leisure, such as playing sports, took up 17% of leisure time. The remaining leisure time of Canadians in 1998 was spent going to movies,

visiting museums, art galleries and other heritage sites, and attending other entertainment events.

Radio and television

Listening to the radio is a leisure pastime that can accompany other activities, such as driving to work or doing chores. In 2002, Canadians spent, on average, 20 hours a week listening to the radio.⁸ Radio listening was most popular with adults 18 years or older and those with higher levels of education, while teenagers between 12 and 17 years listened to the radio the least of all age groups. In 2002, residents of Prince Edward Island listened to the radio the most, an average of 22.2 hours per week, while residents of British Columbia listened the least, an average of 18.3 hours per week.

In 2002, Canadian men aged 18 and over watched an average of 21.0 hours of television per week, while women watched an average of 25.8 hours per week.⁹ Residents of Quebec and Prince Edward Island watched the most television, while residents of British Columbia and Alberta watched the least. Children aged 2 to 11 watched an average of 14.6 hours of television per week, while teens aged 12 to 17 watched an average of 13.7 hours.

Reading

In 1998, Canadians spent 24 minutes per day reading, with women being more avid readers than men. In 1998, 82% of Canadians aged 15 and over read newspapers, 71% read magazines and 61% read books. Men spent more time reading newspapers, while women spent more time reading magazines and books. The participation rate of Canadians in reading, however, dropped

significantly between 1992 and 1998. For example, in 1992, 92% of Canadian adults read newspapers; by 1998 the proportion had dropped to 82%. Similarly, for books, the percentage dropped from 66% in 1992 to 61% in 1998.

Surfing the Net/computer games

Surfing the Internet at home has increased dramatically in Canada. The Household Internet Use Survey (HIUS)¹⁰ has tracked use of the Internet by Canadians aged 15 and over since 1997. After surging during the late 1990s, the growth in Internet use among Canadian households levelled off in 2002. In 2002, approximately 7.5 million households had at least one member who used the Internet regularly, either from home, work, school, a public library or another location, up only 4% from 2001. This rate of growth was far below the gains of 19% in 2001 and 24% the year before. In 2002, 50% of households who were Internet users

5. *Other performing arts consist of performing artists working individually or in groups or companies. Included are acrobats, clowns, fire-eaters, sword swallowers, stilt walkers, tri-cyclists, magicians, ventriloquists, variety and mime artists, comedians, ice dancers, reciters, poetry readers and oral history performance artists.*
6. *Statistics Canada. The General Social Survey (1992 and 1998) asked Canadians (15 years of age and older) about their use of free time and engagement in leisure or cultural activities during the previous 12 months.*
7. *For purposes of this article, leisure time includes socializing; television, reading and other passive leisure; attending sports, movies and other entertainment events; and active leisure, such as playing sports.*
8. *Statistics Canada, Radio listening data bank, 2002.*
9. *Statistics Canada, Television viewing data bank, 2002*
10. *Statistics Canada, Household Internet Use Survey.*

had a household member who used the Internet to play games. Playing games on the Net was most common for 15 to 19 year olds males and males.

Participation in cultural activities Attendance declined between 1992 and 1998 at popular musical performances, symphonic and classical music, opera, children's performances, museums and art galleries, zoos, aquariums, botanical gardens, planetariums, and conservation and nature parks. In comparison, going to the movies was an increasingly popular leisure time activity, with almost 60% of Canadians attending at least once in 1998, compared to 49% in 1992. Those aged 15 to 24 went to the movies most frequently. About half of moviegoers attended 1 to 4 times per year, while 26% attended at least once a month.

Men and women had different rates of participation in various leisure activities. Women were more inclined toward culture related leisure activities while men were more

inclined toward sport related activities. Attendance at performing arts events varied by age. For example, popular music events were attended largely by youth between 15 and 24 years of age, while classical arts performances were attended in higher rates by people aged 35 and over.

Cultured Europeans – fact or fiction?

A 2001 Eurobarometer survey asked people in the European Union (EU) member countries about their participation in specific cultural and leisure activities over a 12-month period.¹¹

Radio and television

Sixty percent of Europeans listened to the radio in 2001 on a daily basis. They preferred music programs (86%) followed by news and current affairs (53%) and finally sports (17%). The Irish, Luxembourgs, and Swedes were the major radio listeners, with over 75% of each of these groups engaging in this activity. In 2001, 99% of Europeans owned a television and 98% watched it over the previous

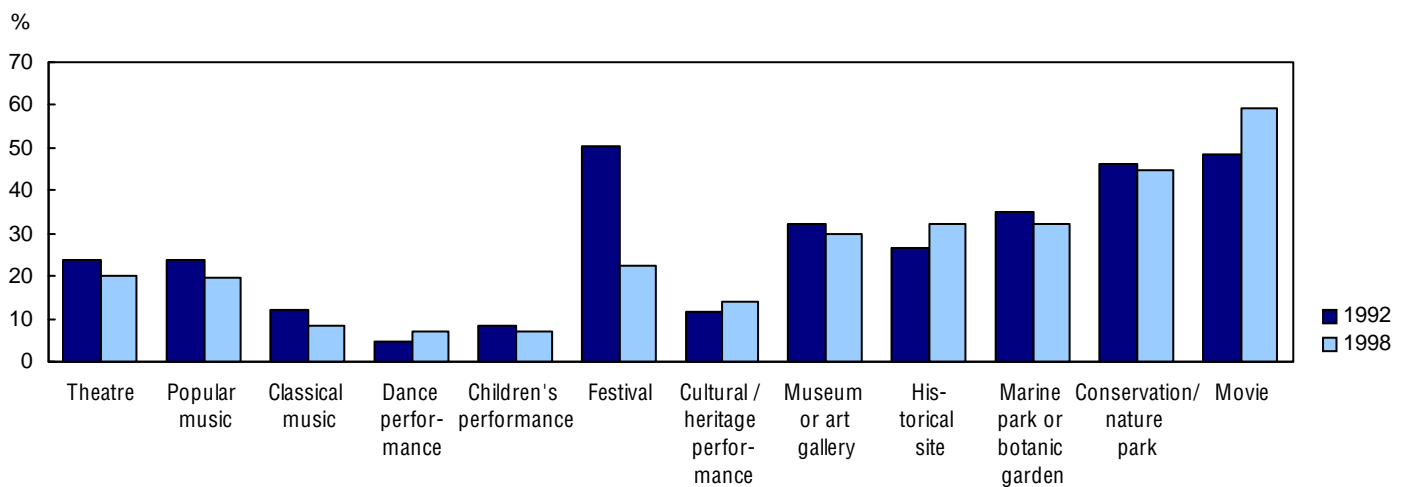
twelve months. Europeans primarily watched news and current affairs (89%), followed by films (84%), documentaries (62%) and sports (50%). Two-thirds watched videos or DVDs on television. Preferences were related to age, sex and education. Music programs were preferred by young persons 15 to 25 years old. More women watched soap operas or series, while more men watched sports. Those with higher levels of education watched more documentaries.

Reading

Forty-five percent of Europeans read books in their leisure over the prior 12-months. Northern Europeans (Swedes (72%), Finns (66%) and Brits (63%)) reported being more avid readers than did their southern neighbours. Reading newspapers and magazines followed a similar pattern in Europe where the Finns, Swedes and Germans showed the highest rate of newspaper and magazine reading, while Greeks and Portuguese showed the lowest rate.

11. The European Commission, Eurostat.

Figure 2
Attending festivals has become less popular for Canadians



Source: Statistics Canada, 1992 and 1998 General Social Survey.

Leisure reading rates were closely linked to education, with the more educated reading most in all European Union member countries. For all countries, however, women tended to be more avid readers than men were.

Computer/surfing the Net

More than half of Europeans did not use a computer in 2001. On the other hand, over 20% used it every day and 16% used it several times a week mostly for leisure. Thirty-five percent of Europeans surfed the Net. Swedes, Danes, Dutch and Finns used the Net more than did the Portuguese and Greeks. Men were more likely to be computer users (52%) than women were (41%).

Young Europeans, aged 15 to 24, were the biggest computer users (76%) while adults 55 and over used it the least (15%). Rate of use tended to be higher with increasing educational attainment. About 33% of Europeans using the Net searched for information on sport and leisure activities.

Attendance at cultural activities

Cinema attending was the most popular activity, with Europeans going to the movies about twice over a 12-month period. The Spaniards and Irish were big cinema buffs, while Portuguese, Finns and Greeks attended at lower rates. Ballet and dance performances were the least likely to be attended. Higher educational levels were associated with greater participation in cultural activities. Attendance at performing arts performances varied by age and sex, although there were no consistent patterns from activity-to-activity.

United States of America – are our neighbours like us?

In the United States, a number of surveys provide information that help paint a picture of Americans and their participation in leisure activity.

Radio and television

According to a survey conducted by Veronis Suhler Stevenson, Americans (12 years and older) listened to the radio for 973 hours per capita over the year in 1996.¹² This dropped to 971 hours per capita in 2000. However, a recent study suggested that a slightly greater interest in radio would occur by 2005 as hours of radio listening per capita are projected to rise.

Another survey in 2002 by Mediamark Research¹³ revealed that 84 % of Americans (18 years or more) listened to the radio in the preceding week. This survey found a slightly higher percentage of men (86%) listened to radio than women (83%). In general, as the age of the listener rose, the amount of time spent listening to radio dropped. In addition, more educated and higher income groups were inclined to listen to more radio. The Veronis Suhler Stevenson survey showed that television viewing is on the increase in the United States.¹⁴ Americans watched 1,559 hours per capita per year of television in 1996 compared to 1,633 hours in 2000. Ninety-four percent of Americans watched television during the previous week¹⁵ according to the Mediamark Research Survey. Those 65 and over viewed more television than other age groups. Men watched television at slightly greater rates than did women. Unlike radio listening, education and income did not affect the amount of television that people watched.

Reading

In a 2002 National Endowment for the Arts survey,¹⁶ 46% of respondents said they had read plays, poetry, novels or short stories in the previous year. More specifically, 45% said that they had read a novel or short story within the past year, 12% had read poetry, and 4% had read plays. Reading rates were higher for those with higher levels of education and income.

According to the 2001 Mediamark Research survey,¹⁷ 43% of Americans (18 years or older) read books in the prior 12 months. Newspaper reading rates were 79% in 2001.

Surfing the Net/Computer Games

According to the 2000 Current Population Survey¹⁸, 51% of households in the U.S. had one or more computers in August 2000, up from 42% in December 1998. Forty-two percent of Americans had at least one member of the household surfing the Net in 2000. This was up from 1998 when 26% and 1997 when 18% were using the Internet. About 11% of children 3 to 17 used the Net to play games, entertainment and fun compared to only 5% of adults (18 years and over).

12. Data obtained from Statistical Abstract of the United States: 2002, U.S. Census Bureau.

13. *Ibid.*

14. *Ibid.*

15. *Ibid.*

16. *National Endowment for the Arts. "2002 Survey of Public Participation in the Arts."*

17. *Data obtained from Statistical Abstract of the United States: 2002, U.S. Census Bureau.*

18. <http://www.census.gov/>

The higher the educational attainment of people, the more likely it is that they used the Internet. High-income households tended to have computers and Internet access. Those aged 25 to 44 and married-couple households were the biggest users of the Internet at home.

Attendance at leisure activities/arts events

According to the 2002 Survey of Public Participation in the Arts Survey, close to one third of American adults (32%) visited a historic park over the previous 12-month period. About the same proportion (33%) attended arts festivals and crafts fairs; 27% visited an art museum; about one in six adults (17%) went to at least one performance of a musical play; and about one in eight adults (12%) attended a non-musical play or live

classical music performance. Roughly one in twenty-five American adults (4%) went to the ballet, while about one in thirty (3%) went to an opera.¹⁹

World leisure activities – what have we learned?

While data on leisure activities across countries is not directly comparable, some common themes and marked similarities have emerged. Watching television and reading were the most popular home-based leisure activities, while radio listening and surfing the net were less popular. Men appeared more likely to watch television and use the Internet, while women tended to do more reading. Men were more likely to read newspapers while women tended to prefer books or magazines.

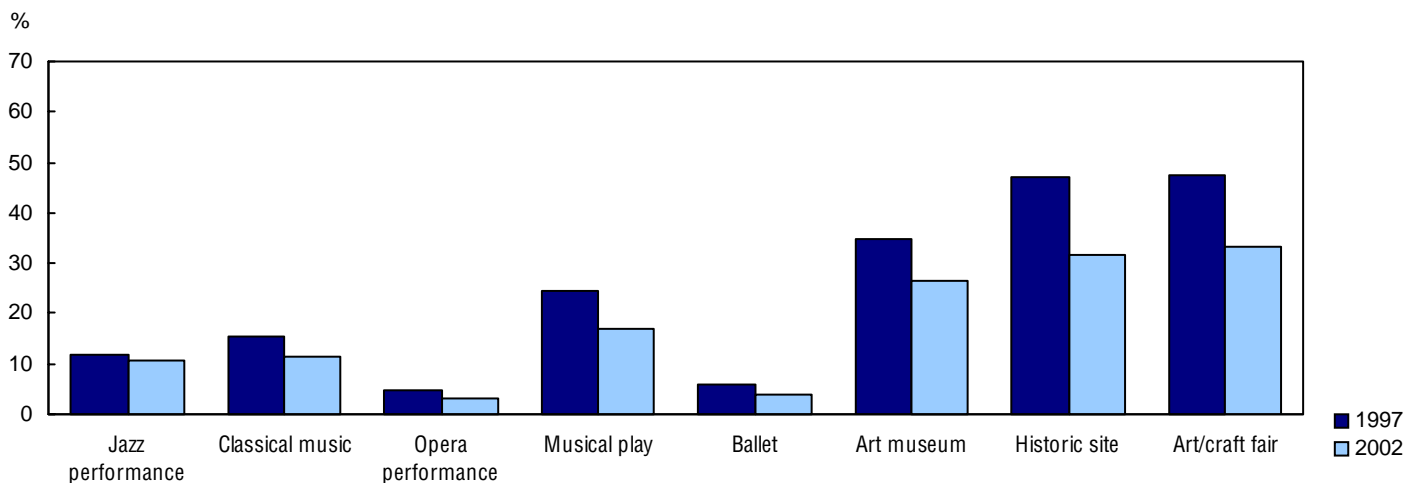
Movies or cinemas were the most popular leisure venues outside the

home. Women generally participated in most arts events/activities at greater rates than men did, while men participated more in sports events/activities than did women (although there were no consistent patterns from activity to activity). Greater education and income tended to raise the participation rates for both home-based and local leisure activities. Households with high income, those with members active in the labour force, those with children still living at home and those with higher levels of education were most likely to be computer and Internet users.

19. *National Endowment for the Arts. "2002 Survey of Public Participation in the Arts."*

Isme Alam is an analyst with the Culture Statistics Program.

Figure 3
Americans' attendance at arts events declines



Source: *Survey of Public Participation in the Arts, National Endowment for the Arts, 1997 and 2002.*

□

The Canada Cuba Social Club

(Second in a series of profiles of Canada's culture trade)

by **Jamie Carson**

The neighbour is playing a Brian Adams tape at high volume, disturbing the kids who have gathered to watch Degrassi Junior High on television. You might think the scene is being played out in Canada, but the setting is Cuba. Canadians have come to know Cuba as a top-ranked tourist destination,¹ but the Caribbean island was also the source of Canada's biggest culture goods trade surplus in 2002.

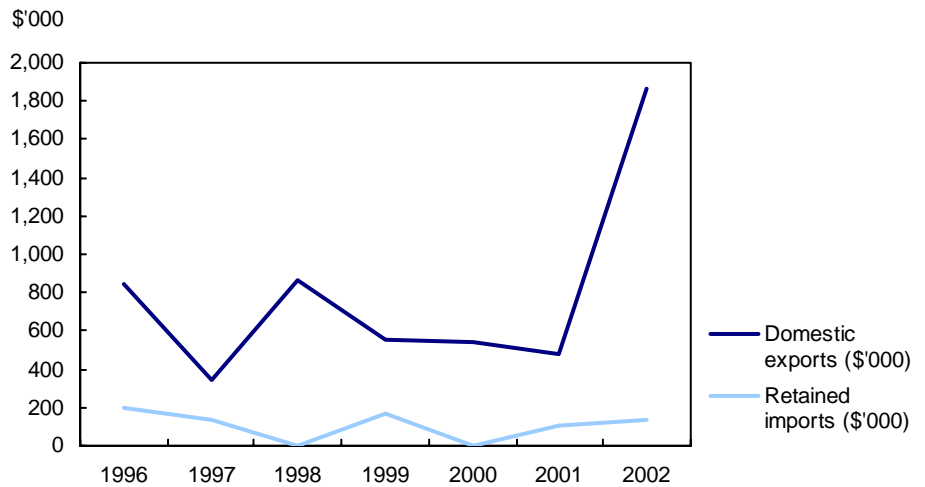
The difference between the value of domestic exports of culture goods from Canada and retained imports from Cuba was \$1.7 million in 2002. Cuba was one of eight countries with which Canada had a culture goods trade surplus for the year. In stark contrast, Canada was in a deficit position with 33 trade partners. The largest culture goods trade deficit was with the United States, with a value of \$647.8 million in 2002.

As shown in the chart, the 2002 surplus with Cuba arose due to a

1. *Canadians made over 330,000 visits to Cuba in 2002. Source: International Travel Survey. See "Canadian Statistics: Top 15 countries visited by Canadians" web page <http://www.statcan.ca/english/Pgdb/arts37a.htm>.*

Note that the data presented in this article exclude low value shipments of culture goods brought to or from Cuba by Canadian tourists. This article also excludes trade in culture services, such as broadcasts and performances. The Cuban travel agency Cubanacán indicates that cultural tourism is a fast-growing market segment (Source: Directorio Turístico de Cuba News Boletín Semanal - Año III, Número 1, January 7, 2002).

Figure 1
Canada's culture trade surplus with Cuba widened in 2002



Source: Statistics Canada, *Culture Trade and Investment Project*.

\$1.4 million spike in exports. Of this, \$1.2 million can be accounted for by a year-to-year increase in publishing and printing exports. Much of this increase can be traced to an aid project to provide textbooks to Cuban students, which was funded by the Canadian International Development Agency (CIDA).² Other prominent cultural exports to Cuba include DVDs and compact discs. Cuban music labels such as *Egrem* have used Canadian disc-pressing plants to mass-produce the works of popular musicians such as Eliades Ochoa.

Ironically, much of the market for commercial culture products in Cuba would appear to be foreign tourists. Canadians spend an estimated \$103 a day in Cuba³ (overall spending, not simply on culture goods), while the average monthly income is the equivalent of about \$16 (Canadian) for Cuban workers.⁴ On average, each Cuban also receives the equivalent of 8 months' wages in family remittances per year, mainly from overseas relatives in the United States.⁵ In addition, Cubans receive

free rations of certain goods and subsidized rates for many services. In all, the CIA World FactBook estimates Cuba's per capita GDP on a purchasing power basis to be \$4,240 per year.⁶

2. *Sources: CIDA web site: http://www.acdi-cida.gc.ca/cida_ind.nsf/vall/467FE28CFE40716B852567E500400AD3?OpenDocument and Prensa Latina news report, "Cuba, Canada sign education sector Memorandum of Understanding on aid," November 17, 2001. Note that foreign aid shipments count as merchandise exports, even though the goods are paid for from within the country.*

3. *Source: International Travel Survey.*

4. *Based on the rough Canadian equivalent of Ritter and Rowe's estimate in "Cuba: From 'Dollarization' to 'Euroization' or 'Peso Re-Consolidation'?", Revised, March 9, 2002.*

5. *ibid. Ritter and Rowe state: "The most important source of dollars for monetary circulation is undoubtedly family remittances." The 8-month estimate used in this article is based on dividing their estimate by the 11 million population of Cuba.*

6. *Source: 2002 United States Central Intelligence Agency World FactBook, converted to Canadian dollars.*

Cuba suffers from persistent current account deficits and “hard currency” shortages, and has high levels of debt. The potential for Canadian exports to Cuba also suffers because “[s]hort-term insurance facilities of the Export Development Corporation (EDC) are not available to Canadian exporters [to Cuba] due to longstanding debt problems.”⁷

Despite this, one might suppose that Canadian exporters would be in a position to take advantage of the US trade embargo with Cuba. However, several US culture products are openly available in Cuba. In terms of goods, US-made compact discs and videos are sold and rented in many shops. In terms of services, most hotels offer US channels such as CNN and Discovery, and Cubans routinely have access to popular recent US films on state-run television. A US-government study estimates that the potential impact of ending the embargo would only be a 17% increase in their exports to Cuba, and a 45% increase in imports.⁸

The dollar value of Canada’s imports from Cuba is relatively low \$133,000 in 2002. This data limitation restricts our ability to analyze imports by product category. In the mid-1990s, heritage objects were a major category, but in recent years no single product has stood out. Interestingly, according to the US-government study cited above, during this period, “US imports from Cuba consisted almost entirely of art work.”⁹

For more information on the sources and concepts used in this article, please contact the Culture Trade and Investment Project via carsjam@statcan.ca.

Jamie Carson is an Economic Analyst in the Analysis and Integration Section of the Culture Statistics Program, and an avid collector of Cuban music. He observed the scene described in the opening paragraph in the summer of 2002.

7. Source: DFAIT, “CUBA: A Guide for Canadian Business”, Third Edition, March 2001. Catalogue No. E74-84/2001E, ISBN 0-662-30247-8.
8. Source: Adapted from “The economic impact of U.S. sanctions with respect to Cuba”, U.S. International Trade Commission, USITC Publication 3398, Investigation No. 332-413, February 2001.
9. *ibid.*

□

Culture sector employment, 1991-2003

- According to the Labour Force Survey, about 598,000¹ workers were employed in the culture sector in 2003, representing 3.8% of the total workforce in Canada. Between 1991 and 2003, culture sector employment grew 2.5% annually, compared to 1.7% for the total workforce.
- Both full-time and part-time jobs in the culture sector grew significantly between 1991 and 2003. The number of full-time culture jobs reached a new peak of about 463,000 in 2003, representing a 27% increase over 1991. The number of part-time jobs in the culture sector grew 72% between 1991 and 2003,

compared to a 26% growth for all part-time jobs. Between 1991 and 2003, an additional 57,000 part-time culture jobs were created.

- From 1991 to 2003, the unemployment rate for workers in the culture sector in Canada dropped from 7.9% to 5.5%, significantly lower than the unemployment rate for the overall workforce, which stood at 7.6% in 2003.
- The number of public sector employees in the culture sector in Canada dropped from a high of over 51,400 in 1992 to 42,000 in 2003. Public sector jobs represented 7.0% of the culture sector workforce in Canada in 2003, compared to 19% for the total workforce. The number of private sector jobs in the culture sector in Canada increased 30% from 1991 to over 395,000 in 2003, accounting for two thirds of total culture sector employment. The number of self-employed workers in the culture sector soared 71% from 1991 to about 161,000 in 2003. Self-employment in the culture sector in Canada accounted for 27% of workers in the culture sector, compared to 15% for the total workforce.

1. *The Labour Force Survey (LFS) is only capable of tracking NAICS industries at the four digit level. Some industries are therefore not represented (e.g., manufacturing, wholesale, retail and government). This explains the discrepancy between the economic impact estimate of 720,000 jobs in 2001 and of the LFS estimate of 578,000 workers for the same year. The LFS, however, provides timely and reliable data for the culture sector workforce.*

Table 1
Total employment

	Culture	All sectors	Culture share (%)	Annual increase (%)	
				Culture	All sectors
1991	442,305	12,850,657	3.44		
1992	439,961	12,759,972	3.45	-0.5	-0.7
1993	457,062	12,857,470	3.55	3.9	0.8
1994	466,616	13,111,748	3.56	2.1	2.0
1995	479,761	13,356,926	3.59	2.8	1.9
1996	501,029	13,462,599	3.72	4.4	0.8
1997	504,694	13,774,446	3.66	0.7	2.3
1998	518,853	14,140,370	3.67	2.8	2.7
1999	540,497	14,531,177	3.72	4.2	2.8
2000	575,954	14,909,680	3.86	6.6	2.6
2001	577,823	15,076,757	3.83	0.3	1.1
2002	577,231	15,411,834	3.75	-0.1	2.2
2003	598,302	15,745,950	3.80	3.7	2.2
Average annual increase: 1991-2003	2.5	1.7			

Source: Statistics Canada, Labour Force Survey.

Table 2
Full-time employment

	Culture	All sectors	Share (%) of total jobs	
			Culture	All sectors
1991	363,625	10,504,901	82.2	81.7
1992	348,934	10,376,736	79.3	81.3
1993	362,156	10,374,835	79.2	80.7
1994	368,419	10,616,989	79.0	81.0
1995	378,006	10,833,831	78.8	81.1
1996	393,309	10,883,004	78.5	80.8
1997	392,807	11,139,679	77.8	80.9
1998	406,343	11,466,568	78.3	81.1
1999	431,018	11,849,239	79.7	81.5
2000	456,561	12,208,115	79.3	81.9
2001	460,843	12,345,165	79.8	81.9
2002	448,864	12,528,152	77.8	81.3
2003	462,663	12,781,102	77.3	81.2
Average annual increase: 1991-2003	2.0	1.6		

Source: Statistics Canada, Labour Force Survey.

Table 3
Part-time employment

	Culture	All sectors	Share (%) of total jobs	
			Culture	All sectors
1991	78,680	2,345,756	17.8	18.3
1992	91,027	2,383,236	20.7	18.7
1993	94,906	2,482,635	20.8	19.3
1994	98,197	2,494,759	21.0	19.0
1995	101,755	2,523,095	21.2	18.9
1996	107,720	2,579,595	21.5	19.2
1997	111,887	2,634,767	22.2	19.1
1998	112,510	2,673,802	21.7	18.9
1999	109,479	2,681,938	20.3	18.5
2000	119,393	2,701,565	20.7	18.1
2001	116,980	2,731,592	20.2	18.1
2002	128,367	2,883,682	22.2	18.7
2003	135,639	2,964,848	22.7	18.8
Average annual increase: 1991-2003	4.6	2.0		

Source: Statistics Canada, Labour Force Survey.

Table 4
Culture sector employment by type of business

	Public	Private	Self-employed	Total	Allocation (%)			
					Public	Private	Self-employed	Total
1991	44,631	303,348	94,279	442,258	10.1	68.6	21.3	100.0
1992	51,417	295,333	93,155	439,905	11.7	67.1	21.2	100.0
1993	43,366	300,710	112,930	457,006	9.5	65.8	24.7	100.0
1994	50,788	303,065	112,698	466,551	10.9	65.0	24.2	100.0
1995	46,591	318,553	114,568	479,712	9.7	66.4	23.9	100.0
1996	46,031	329,643	125,292	500,966	9.2	65.8	25.0	100.0
1997	40,273	326,304	138,061	504,638	8.0	64.7	27.4	100.0
1998	40,850	334,147	143,797	518,794	7.9	64.4	27.7	100.0
1999	38,030	364,359	138,054	540,443	7.0	67.4	25.5	100.0
2000	38,996	388,133	148,776	575,905	6.8	67.4	25.8	100.0
2001	42,885	388,114	146,764	577,763	7.4	67.2	25.4	100.0
2002	36,017	393,600	147,556	577,173	6.2	68.2	25.6	100.0
2003	41,986	395,111	161,150	598,247	7.0	66.0	26.9	100.0
Average annual increase: 1991-2003	-0.5	2.2	4.6	2.5	-3.0	-0.3	2.0	

Source: Statistics Canada, Labour Force Survey.

□

Provincial and territorial data

Often in our analysis of survey data, we look at the national picture only, and do not highlight provincial or territorial patterns. In order to provide more regional data for our users, we are including selected provincial data in each issue of *Focus on Culture*. This time we are presenting recently released data from the Radio Listening Survey.

Total federal government expenditures on culture, by province or territory

Province or territory	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002
	thousands of dollars				
Newfoundland and Labrador	38,573	40,195	42,642	45,429	47,577
Prince Edward Island	15,139	16,885	16,451	16,427	22,260
Nova Scotia	88,416	92,992	89,478	89,217	99,641
New Brunswick	43,642	48,676	48,585	48,817	50,528
Quebec	832,616	931,240	912,888	990,030 ^r	1,107,870
Ontario	1,131,132	1,112,020	1,123,657	1,148,852	1,260,574
Manitoba	61,943	67,388	94,277	67,583	75,177
Saskatchewan	34,310	44,327	44,329	40,995	46,119
Alberta	127,820	129,389	115,986	146,165	153,622
British Columbia	130,082	152,886	143,684	158,553	160,396
Yukon	12,778	14,753	13,467	12,452	13,363
Northwest Territories	29,449	30,832	35,929	30,785	32,840
Nunavut	..	..	11,127	6,306	8,060
Other ¹	114,981	135,503	125,197	153,182	138,899
Total expenditures	2,660,880	2,817,086	2,817,699	2,954,793^r	3,216,927

.. not available for a specific reference period

^r revised

¹ Includes national organizations, foreign countries and unallocated expenditures.

Sources: Statistics Canada, Survey of Federal Government Expenditures on Culture.

Total provincial government expenditures on culture, by province or territory

Province or territory	1997-1998	1998-1999	1999-2000	2000-2001	2001-2002
thousands of dollars					
Newfoundland and Labrador	45,699	36,067	36,620	32,719	33,854
Prince Edward Island	10,677	10,071	10,842	11,451 ^r	11,029
Nova Scotia	59,101	67,507	68,093	60,312	59,332
New Brunswick	41,530	39,499	39,745	41,913	46,370
Quebec	568,964	652,257	654,316	728,985	761,773
Ontario	446,168	517,358	551,356	524,170	551,120
Manitoba	93,198	93,971	99,453	99,068 ^r	101,697
Saskatchewan	63,998	69,525	69,209	75,373 ^r	83,969
Alberta	123,646	130,030	142,350	196,170	175,292
British Columbia	264,385	285,599	295,372	305,703	305,295
Yukon	11,805	10,958	12,441	13,578	12,680
Northwest Territories	8,241	9,841	7,429	7,036	7,301
Nunavut	..	..	..	..	..
Total expenditures	1,737,412	1,922,683	1,987,226	2,096,479^r	2,149,711

.. not available for a specific reference period

^r revised

Source: Statistics Canada, Survey of Provincial/Territorial Government Expenditures on Culture.

Total municipal government expenditures on culture, by province or territory

Province or territory	1997	1998	1999	2000	2001
thousands of dollars					
Newfoundland and Labrador	10,866	10,701	11,137	10,981	11,700
Prince Edward Island	1,649	1,575	1,756	2,158	2,541
Nova Scotia	30,206	31,691	33,887	36,832	39,917
New Brunswick	19,276	18,515	19,559	21,199	21,412
Quebec	274,088	221,310	245,518	338,495	340,719
Ontario	674,290	622,262	678,817	706,032	826,204
Manitoba	59,189	52,288	52,288	53,444	41,254
Saskatchewan	57,910	61,757	56,826	57,177	58,507
Alberta	135,412	150,390	143,768	146,016	154,982
British Columbia	293,075	275,263	289,932	286,006	314,296
Yukon	3,662	522	581	575	524
Northwest Territories	2,290	1,685	1,522	1,383	1,479
Nunavut	..	..	..	21	21
Total expenditures	1,561,913	1,447,959	1,535,591	1,660,319	1,813,556

.. not available for a specific reference period

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

□

DID YOU KNOW? New data on film, video and audio-video distribution, 2001

Revenues hit another record high for film distributors and video wholesalers in Canada in the fiscal year 2001/02. However, the rate of growth in revenues was slower than in previous years, as sales abroad of home-grown films and videos fell for the first time in a decade.

Revenues for the industry reached an all-time high of \$3.0 billion, up 7.9% from the previous year. In 2000/01, distributors' revenues grew 13.1% over 1999/2000.

Table 1
Number of firms by principal activity and financial control

	1997/98	1998/99	1999/00	2000/01	2001/02
Both distributing & wholesaling					
Canadian control	17	23	25	24	30
Foreign control	2	1	2	5	5
Total	19	24	27	29	35
Film and video distribution only					
Canadian control	106	121	122	128	122
Foreign control	13	14	14	15	13
Total	119	135	136	143	135
Videocassette wholesaling only					
Canadian control	37	36	38	41	43
Foreign control	3	4	4	3	4
Total	40	40	42	44	47
Total distributing & wholesaling					
Canadian control	160	180	185	193	195
Foreign control	18	19	20	23	22
Total	178	199	205	216	217

Source: Statistics Canada, Film, Video and Audio-Visual Distribution and Videocassette Wholesaling Survey.

Table 2
Employment

	1997/98	1998/99	1999/00	2000/01	2001/02
Total employment					
Full-time	2,086	2,643	3,203	3,045	3,551
Part-time	232	315	400	518	335
Working proprietors	12	6	17	29	14
Total	2,330	2,964	3,620	3,592	3,900
Salaries & benefits (\$ '000s)	83,528	112,392	135,588	144,578	172,005
Foreign controlled share					
Employment %					
Full-time	15.6	15.6	14.4	15.0	14.5
Part-time	6.5	14.3	10.3	0.4	2.4
Working proprietors	0.0	0.0	0.0	0.0	0.0
Total	14.6	15.4	13.9	12.8	13.4
Salaries & benefits	20.5	22.6	20.7	20.9	18.6

Source: Statistics Canada, Film, Video and Audio-Visual Distribution and Videocassette Wholesaling Survey.

Table 3
Revenue from distribution of Canadian and non-Canadian content

	1997/98	1998/99	1999/00	2000/01	2001/02
	thousands of dollars				
Canadian content					
Distribution in Canada	77,120	113,341	126,439	101,879	107,915
Movie theaters	5,665	7,545	9,764	7,613	8,560
Pay TV	9,840	11,910	16,201	19,097	22,848
Conventional TV	53,585	86,961	91,130	64,489	65,529
Home video	1,826	3,277	4,229	4,810	4,566
Other (e.g. governmental, educational)	6,204	3,647	5,116	5,870	6,412
Distribution outside Canada	101,173	147,440	172,809	177,537	173,903
Total revenue from Canadian content	178,293	260,781	299,248	279,416	281,818
Non-Canadian content					
Distribution in Canada	741,654	765,846	839,135	968,981	1,103,746
Movie theaters	271,046	310,392	350,711	382,971	394,506
Pay TV	49,972	44,996	52,482	62,115	87,680
Conventional TV	286,477	272,157	278,196	345,087	399,975
Home video	123,282	126,209	143,371	160,936	208,400
Other (e.g. governmental, educational)	10,878	12,092	14,375	17,872	13,186
Distribution outside Canada	30,898	38,085	14,556	44,719	30,761
Total revenue from non-Canadian content	772,552	803,931	853,691	1,013,699	1,134,507

Source: Statistics Canada, *Film, Video and Audio-Visual Distribution and Videocassette Wholesaling Survey*.

□

HOW ARE WE DOING?

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

Send your comments to:

Alice Peters, Editor-in-chief

Focus on Culture

Culture Statistics Program

Statistics Canada

Ottawa, ON

K1A 0T6

Telephone: (613) 951-4086

Fax: (613) 951-1333

E-mail: alice.peters@statcan.ca

HOW TO FIND OUT MORE...

For information on special data tabulations, the content of specific surveys, concepts, methods or data quality, please contact Client Services, Culture, Tourism and the Centre for Education Statistics by:

- **Telephone:** Toll-free at 1 800 307-3382 or (613) 951-7608
- **Fax:** (613) 951-9040; or
- **E-mail:** cult.tourstats@statcan.ca



OTHER PUBLICATIONS FROM THE CULTURE STATISTICS PROGRAM...

87-008-GIE *Guide to culture statistics*, available free at:

<http://dissemination.statcan.ca/english/IPS/Data/87-008-GIE.htm>

To order publications, in Canada and United States please:

Telephone: Call the national order line toll-free: 1-800-267-6677

Fax: (613) 951-9040

Internet: order@statcan.ca

National TDD Line: 1-800-363-7629

IF YOU'RE ON THE MOVE...

Make sure we know where to find you. Please forward the necessary information (subscriber name, old address, new address, telephone number and client reference number) to:

Operations and Integration Division
Circulation Management
Statistics Canada
120 Parkdale Avenue
Ottawa, Ontario
K1A 0T6

Note of appreciation

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

The paper used in this publication meets the minimum requirements of American National Standard for Information Sciences – Permanence of Paper for Printed Library Materials, ANSI Z39.48 – 1984.



Focus on Culture

Editor-in-Chief:

Alice Peters
Telephone: (613) 951-4086
E-mail: alice.peters@statcan.ca

Composition and production:

Dissemination Division, Statistics Canada

Printing: Statistics Canada Printing Centre

Subscription Information

All prices exclude sales tax

Focus on Culture (Catalogue no. 87-004-XPB) is published quarterly as a standard printed publication at a price of CDN \$10.00 per issue and CDN \$29.00 for a one-year subscription. ISSN 0843-7548

The following additional shipping charges apply for delivery outside Canada:

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

This product is also available in electronic format on the Statistics Canada Internet site as Catalogue no. 87-004-XIE at a price of CDN \$8.00 per issue and CDN \$22.00 for a one-year subscription. To obtain single issues or to subscribe, visit our Web site at www.statcan.ca, and select Products and Services.
ISSN 1481-1030

July 2004

Copyright

Published by authority of the Minister responsible for Statistics Canada. © Minister of Industry, 2004. All rights reserved. No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise without prior written permission from License Services, Marketing Division, Statistics Canada, Ottawa, Ontario, Canada K1A 0T6.

Standards of service to the public

Statistics Canada is committed to serving its clients in a prompt, reliable and courteous manner and in the official language of their choice. To this end, the agency has developed standards of service which its employees observe in serving its clients. To obtain a copy of these service standards, please contact your nearest Statistics Canada Regional Reference Centre.