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Consumption and Participation in the Culture Sector

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The culture sector in Canada interweaves itself into the social, ethnic, linguistic, demographic, political and economic threads that define our national character.

This article focuses on some questions dealing with the consumption of cultural goods and participation in cultural activities. How do we define the consumption of culture? What are the culture preferences of consumers? In what ways is technology influencing the consumption of culture and, in fact, the products themselves?

Measuring the consumption of culture

What do we mean by the consumption of culture? A broad definition of consumption includes looking at those in the community who attend, buy, listen to, read, use, do volunteer work for, or donate to, culture. In 1996, Canadians spent $14.0 billion on culture events and activities, an increase of 27.5% from 1986. Over the same period, total expenditures by Canadians on all goods and services increased by 18.5%.

Consumption has both an economic and a time-use component. These components are measured in different ways using different tools. Economic consumption can be measured by monitoring our spending behaviour. Statistics Canada's Survey of Household Spending (SHS)[1] is a key source of information on this demand side of consumption.

Time-use is measured by examining how we spend our time each day by type of activity. Do we go to culture activities and events and how often? What kinds of culture activities and events do we attend or participate in? Various questions were added to Statistics Canada's General Social Survey (GSS) in 1992 and 1998 to find out the answers, making it possible to develop a profile of the culture consumer. This non-economic view of culture consumption is, in one sense, a more accurate reflection of the importance of culture in people's lives, as not all culture activities require a monetary expenditure. Free outdoor music festivals, free museum admissions or the use of public libraries are examples. As well, the GSS looks at an individual's cultural preferences while the SHS data relate to a group of individuals living together in a household.

Another aspect of participation is that of volunteering and patronage: who volunteers in the area of culture; what is the profile of the culture volunteer compared to volunteers in other non-profit areas; how much money is given to cultural non-profit institutions? Suffice to say that volunteer staff is a large and essential part of organizations like performing arts companies and heritage institutions, and that culture donors are responsible for an increasing proportion of the revenues of not-for-profit culture institutions.

The economics of consuming culture

Expenditures by Canadians follow the general cycles of our economic health as a nation. Consumer spending is very sensitive to the business cycle. The recessions of the early 1980s and early 1990s caused average household expenditures to drop by just over 9% each time. Following the recession of the early 1980s, the recovery helped establish a new peak of household spending in 1989, which has not been surpassed since. The swings in average expenditures have been more volatile than the swings in average family incomes.

The discretionary nature of the consumption of traditional cultural items logically should tie it more closely to the economic cycle than many other categories of spending. The consumer must feed, shelter and clothe himself before he can think of spending money on the movies or the opera, or buying a new book or visiting a museum. Despite this, there has been a significant growth in consumption within the culture sector. Between 1986 and 1996, the average Canadian household increased its expenditures

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[1] *The Survey of Family Expenditures was renamed the Survey of Household Spending in 1997.*

on cultural events and activities by 58%. Overall, household spending increased by a lesser amount, 34%. In real terms, after removing the effect of price changes (inflation), the increase in expenditures between 1986 and 1996 on all culture events and activities was 3%, while overall personal expenditures on consumer goods and services actually dropped by 1.5%. The robustness of the culture marketplace is evident, therefore, in consumers spending less overall, but still increasing their expenditures on culture items. Demographics partially account for this phenomenon. We are now an aging population and studies have shown that older age groups tend to spend more on culture.

Studies continue to show that the highest income households spend the most on cultural services. Earl's study[2] of 1996 Family Expenditures Survey (FAMEX) data relating to entertainment services found that those households in the highest-income quintile spent on average $872 on entertainment services. Though this group comprised 20% of all households, it represented about 33% of the consumer market for entertainment services. Those in the middle three income quintiles (i.e. comprising 60% of households) made up 58% of the consumer market for these services, while those households in the bottom 20% only spent 10% on these same services.

The 1998 GSS also shows that the age of consumers has a direct bearing on their habits. The most striking observation is the dominance of the age group 45-59 in attending such types of culture events as the performing arts, visiting a public art gallery or going to a museum. There is a certain freeing up of disposable income when people are in their prime wage-earning years, their children are setting up their own households, and the family mortgage is nearing term. The huge baby boom cohort, now between the ages of 32 and 51, will be moving into this age group over the next decade. While their habits may not replicate those of the older group, it is likely that participation in less active leisure activities such as reading, doing crafts, going to museums and attending theatre and music concerts will be more popular than participating in sports or other high energy activities, for example. The influence of age is likely to continue to play a prominent role in lifestyle choices and leisure pursuits.

Changing Consumer Preferences

In looking at changing consumer preferences, we can examine not only how the dollar amount spent on culture has varied but also how the number of persons or households actually spending or participating in culture has fluctuated between 1986 and 1996. Amount spent and participation rate do not always correlate. When looking at dollar amounts spent, a much more accurate picture can be drawn by using constant 1986 dollars; prices for culture activities and services increased a full 9 percentage points more than all Canadian goods and services combined. The quandary of fewer people participating but spending more can be explained by higher prices. On the other hand, an increase in the number of people purchasing a particular piece of culture equipment, for example, may not indicate an increased average expenditure per family on the item if prices have come down over the years - such as for camcorders. It is necessary, therefore, for both indicators to be examined to have a more comprehensive understanding of consumption. Accordingly, using several indicators, one could group overall the most popular culture activities by whether there was an increase or decrease in consumption from the mid 1980s to the mid 1990s.

Attending a performing arts play or concert, reading, and to a lesser extent, visiting heritage institutions and watching television are all declining as leisure culture activities. On the other hand, going to the movies, purchasing cablevision services, renting and buying videos, purchasing music, and accessing the Internet have all been on the rise since the mid 1980s. Time spent listening to the radio increased slightly in 1998 after four years of decline.

To do or not to do?

Let's look first at the activities suffering from declining popularity.

Performing arts companies finding smaller audiences

Consumption in the area of not-for-profit performing arts has been decreasing in the 1990s. From Statistics Canada's survey of non-profit performing arts companies we know that between 1994-95 and 1996-97, music, theatre and opera all showed decreases in attendance of 6%, 17% and 22% respectively. This trend was also noted in the GSS where there has been a drop in attendance from 11% of the population in 1992 to 9% in 1998 for classical music, from 22% to 19% for theatre, and 4% to 3% for opera. Only dance companies have actually increased their attendance (from 5% to 7% of the population between 1992 and 1998).

While the proportion of families reporting spending on the arts dropped 4 percentage points between 1986 and 1992, and regained a little by 1996, family spending on the arts remained at a lower level in 1996 than a decade earlier. The FAMEX survey shows a decrease of 13% in average family expenditures on tickets to both commercial and not-for-profit performing arts combined between 1986 and 1996 (using constant 1996 dollars). Current dollar figures give a completely different picture with a 56% increase in what families spent for a night at the performing arts. This likely highlights the significant increases in ticket prices that occurred over the period, fueled in part by the whopping price tags associated with the new wave of blockbuster musical theatre productions such as Phantom of the Opera, Showboat, Cats, etc. It has been suggested that at another time, the popularity of such shows would not have reached the heights they have. The front-end of the boomers, in their 40s, have likely been much more receptive to such live musical performances, and the price tag has been affordable for many of them.

While the non-profit performing arts companies themselves have reported drops in attendance this decade they have recently been recording increases in revenue. The net operating balance improved between 1994-95 and 1996-97. Perhaps some of the least profitable companies were forced to close their doors during the economically difficult early 1990s. Certainly the proportion of families paying to see a play or listen to a concert dropped between 1986 and 1992.

David Foot[3], author of the book *Boom, Bust & Echo 2000*, predicts that, given our demographic structure as a nation, classical music in Canada will grow in popularity as we proceed into the new millennium. At some time in most

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[2] *Louise Earl, "Entertainment services: a growing consumer market,"* Services Indicators, *Statistics Canada, Catalogue No. 63-016-XPB, 3rd Quarter, 1998, pp. 17-33.*

[3] *David Foot,* Boom, Bust & Echo 2000*, Macfarlane Walter & Ross, Toronto, 1996.*

people's lives, a certain appreciation for the music of classical composers begins to outweigh their interest in the latest musical group. It is predicted that other culture areas such as theatre, art galleries and musicals will also see expanding audiences. In the 1980s, "cocooning" or restricting leisure activities outside the home was partly attributable to boomers being in their child-rearing years, with careers unfolding and mortgage payments to be made. But now that more of this segment of the population is moving out of the intense child-rearing years, they are again looking more for outside entertainment. And given the sheer numbers in this population cohort, any direction that even some of them takes, has a profound impact. A 1992 survey, the *Canadian Arts Consumer Profile*, found that 66% of respondents had wanted to attend concerts more frequently.

In a recent article, Bruce Livesey[4] cites Foot's optimism in the continued growth of traditional art forms as the Canadian population ages. However, on the other side of the stage, he also cites two American studies which concluded that young people with higher incomes and education will not be interested in attending classical music, opera, ballet and musical and dramatic theatre in the same proportions as their parents. What may be telling will be the ability of the performing arts to appeal specifically to the baby boomers and increase subscriptions through effective marketing and flexible ticket options, improved customer service, boosted fund-raising, and strengthened relationships with sponsors.

Newspapers, magazines, books, and other printed material on the decline

According to the GSS, between 1992 and 1998 fewer people read newspapers (a drop from 92% to 82%), and magazines (80% in 1992 vs. 71% in 1998) and books (from 66% to 61%). From the FAMEX survey, figures similarly show a decline in both the proportion of Canadians who spent money on reading materials and the average amount they spent.

The proportion of people purchasing newspapers fell from 81% in 1986 to 71% in 1996 while average family expenditures on newspapers actually decreased by more than 27%. This was not an economic decision *per se* as newspaper expenditures are one of the least income-sensitive items, with the richest 20% of households spending only 2.7 times more than the poorest 20% of households. During the same ten-year period, the percentage of households buying magazines went down from 68% to 52%, while the average family expenditure on magazines fell by an even larger 39%. Interestingly, book purchasing data show a constant proportion of the population purchasing books over the period, although the average Canadian family spent 23% less to make their purchases. Perhaps the volume sales of the new book superstores with best-sellers always 20% reduced, and the proliferation of discounts with frequent purchaser cards have contributed to the drop in average book expenditures. And we must not ignore the impact of used book outlets and garage sales. In addition, the increasing use of new media (especially the Internet) for accessing the written word may also partly explain why the buying of some forms of printed material continues to decline.

Some heritage institutions not as popular

The average amount spent on visits to museums, zoos, parks, aquariums, etc. fell by 60% between 1986 and 1996. However, in this case, some portion of this apparent decline in consumer interest is actually caused by a change in question wording – exhibitions and fairs were included in the heritage grouping in 1986 and in 1992 but not in 1996. Not only did the amount spent fall in constant dollars, but the actual dollar amounts spent in each year also tumbled. But perhaps more telling is the decline in the proportion of households who spent money on going to a heritage institution – a drop from 38% to 26% of households between 1986 and 1996. However, between 1989-90 and 1995-96, the number of not-for-profit heritage institutions charging admission increased by almost 18%. Is there a connection? Did fewer families visit institutions that charged admission and more visited those that did not? Looking at museums we see a growth in attendance of 8% during the first half of the 1990s. In fact, more Canadians visited a public art gallery or art museum in 1998 than in 1992. However, because other types of heritage institutions such as archives, exhibition centres, planetariums, zoos and botanical gardens recorded a combined 30% decline in attendance over this same period, there was a total overall decline in attendance reported by all heritage institutions (excluding nature parks) of 5%.

Watching television not as popular as it used to be

The amount of time we spend watching television has generally been declining bit by bit for at least 15 years. During this period Canadian pay television and specialty services have become direct competitors to Canadian conventional television channels. This means that people's viewing options are much greater than ever before while at the same time they are watching less. It also means that the viewing time for conventional channels is more fragmented than ever. On average, Canadians watched television for 22.7 hours per week in the fall of 1997 (compared with 23.8 hours in the fall of 1983).

There are definite differences in the viewing habits of English and French speaking Canadians. Alternative services have not won over the French-speaking market to the same extent as the English-speaking market. American channels have had the least success with French-speaking viewers, accounting for only 4% of their total viewing time. Canadian conventional channels account for most of the viewing time of French speakers, although they too have suffered from the popularity of pay and specialty services, with their market share declining from 90% in 1983 to 78% in 1997. Canadian pay television and specialty services accounted for another 13% of their viewing time. The continued importance of Canadian conventional TV to French-speaking audiences is explained in part by observing that French-speaking viewers simply do not have access, in their own language, to the same range of foreign programs from American networks as do English-speaking audiences. Despite their more restricted supply of programming, Francophones in Quebec continue to post the highest weekly viewing levels (26.5 hours in the fall of 1997).

Age and sex remain key determinants of viewing habits. Among adults, women watch more television than men, while both men and women aged 60 and older watch more television than younger people. Older women watched more television than any other group. Men aged 18 to 24 watched less television than any other age group, followed by teenagers and children.

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4 *Bruce Livesey, "Will Boomers Ever Switch from Al Green to Verdi?"* Financial Post, *March 1, 1997.*

To do, and then some?

Those culture activities and events that are retaining or increasing their hold on the Canadian public's time and pocketbooks include going to the movies, hooking up to cablevision, renting a video and, to a small extent, listening to the radio.

Movies making a comeback

Movies are a real success story. Going to the movies is a growing cultural activity both in the amount it costs and in the number of us who go. This boom comes after four decades of decline. The popularity of television in the 1950s led the film exhibition industry to close 598 theatres, or nearly a third of the total, between 1952-53 and 1963-64. Admissions fell by almost two-thirds, from 247.7 million to 88 million during this period. From then until the beginning of the 1980s, admissions remained quite stable, although the number of theatres fell a further 15%. Then the videocassette recorder once again threatened cinemas. Attendance fell a further 21% between 1979-80 and 1991-92 to reach 69.2 million.

One of the industry's responses to this downward trend was the proliferation of multi-screen complexes – the average number of screens per theatre almost doubled over the previous decade to reach 2.6 in 1991-92. We also began to see a significant trend towards bigger theatres. Between 1993-94 and 1997-98 the number of screens increased again, by an additional 37%. These strategies have obviously helped, as the five years from 1993-94 to 1997-98 saw attendance actually grow, and in fact, this growth reached almost 27%. In 1997-98, attendance at movie theatres and drive-ins reached a 17-year high of 99.9 million. Demographics are also playing a winning hand in this resurgence. The fact that the echo offspring of the leading edge of the boomer generation are now into their teens plays a big role in the popularity of the movie theatre. Young people under the age of 24 are by far the most avid movie goers, and as the significant number of echos moves through their teens and into their early twenties over the next decade, it is not unrealistic to suppose that the appeal of going to the movies will continue. Certainly, the major movie chains are counting on this. Ground-breaking plans are continually being announced for the building of colossal new movie complexes. One may wonder, however, whether the public's resurgence in interest in going to the movies will be able to keep up with this frantic proliferation of sites and services offered. And one might wonder also whether the movie production industry itself will be able to keep up with the audience demand.

According to the GSS, 49% of Canadians in 1992 said that they attended movies, while in 1998 the figure was 59%. The average amount spent per family on movie admissions increased between 1986 and 1992 and even more between 1992 and 1996. This is in contrast to the trend if one uses constant (1986) dollars which reveals a drop of 22% in average family movie expenditures over those ten years; this reflects the large increases that have occurred in the price of movie tickets over the decade, especially in major multiple theatre complexes.

Cablevision: the new frontier

In the 1960s cable television was introduced into Canada, which allowed people to get many more stations (especially American ones) and higher reception quality. In February 1983, pay-TV and specialty services were introduced in Canada. In 1989, more specialty channels appeared, causing further fragmenting of the television audience. Then in January 1995, seven more specialty services became available. In 1997, 15 new Canadian specialty stations surfaced.

With this proliferation of channels it is little wonder that people's expenditures on cablevision continue to soar as consumer demand grows and the market fragments even more. There has been almost a 150% increase in people's expenditures on cable television, from a current dollar average of $104 in 1986 to $254 in 1996. After conversion of the data to constant 1996 dollars, the increase is still 46% ($174 in 1986 to $254 in 1996). Therefore, not only have the options expanded dramatically but so too has the price of all services. The proportion of families spending money on cablevision services increased steadily over the ten years from 1986 to 1996, ending that decade just shy of 70%. Using another data source, we find that between 1992 and 1997 the number of basic cable subscribers increased by 6% while the number of discretionary service (e.g. PAY-TV) subscribers increased by 28%. In 1992, 60% of basic cable subscribers also subscribed to discretionary cable services, while by 1997 this proportion had risen to 73%. Satellite services have only a negligible impact on household expenditure patterns, although for those very few households who do report this item, the average annual expenditure is significant (at $418 in 1996).

Despite the obvious attraction of cablevision for Canadian viewers, it still remains too weak to reverse the long decline in total television viewing from all sources that was noted in the previous section.

Videotape rental and purchase very popular

Expenditures on videotape rentals and purchases skyrocketed between 1986 and 1996 in both current and constant (1996) dollars. In constant dollars, rentals went from $52 to $92 per household, and purchases went from $19 to $39. These dollar values translate into a 77% increase for videotape rentals and a 105% increase for purchases of videotapes and discs. As well, the number of households reporting expenditures on these two items increased between 1986 and 1996 from 42% to 61% of households for rental of videotapes, and from 27% to 32% for the purchase of videotapes. Clearly a much higher proportion of households rents than purchases video tapes and at the same time, the average amount spent remains substantially higher for rentals as households that do rent, presumably rent repeatedly throughout the year. In 1986, 35% of households had a VCR. By 1997, 85% of Canadian households owned one.

Radio listening increasing slightly

Only just very recently, it appears that Canadians may have a renewed interest in listening to the radio. In the fall of 1998 they spent an average of 20.4 hours per week listening to the radio, up from 19.9 hours the year before. This ended four straight annual declines. Nevertheless, listening remained short of the most recent peaks of 21.6 hours a week in both 1990 and 1993. Overall, the largest share of listeners tuned in to adult contemporary music. Among age groups, radio was least popular among teenagers aged 12 to 17. In the fall of 1998 they listened to radio for only 11 hours a week on average, half as much as adults aged 18 and over. This is not too surprising given that young adolescents spend so much time in school and adults are more likely to have the opportunity to listen to the radio as a secondary activity, while commuting or during working hours.

The Future of Culture Consumption and Participation
Over time, technology, combined with changing life-styles and demographics, is shifting the relative importance of certain traditional cultural activities, events and products in people's lives.

According to David Foot, cocooning is seen to be on the decline. This idea is partially based on the fact that the average amount of TV viewing per week has been falling generally throughout the 1980s and 1990s, although it increased somewhat in 1995 following the introduction of the new specialty channels. Although there were more television programs to choose from in 1996, Canadians watched television an average of 22.8 hours per week, which is an hour and a half less than the most recent peak of 24.3 hours per week in 1984. Since these figures include the use of the VCR, which is itself an increasingly popular leisure activity, this trend is especially significant.

Experts are predicting that in the 21st century, cablevision and the television industry will have stiff competition from direct-to-home satellite broadcasting with a possible 300-500 channels available. This phenomenon will fragment even more the viewing audience and cause further competition for the advertising dollar. Computer technology is also a competitor of the broadcast industry with many of the broadcast companies having their own Web-Sites. Consumption of this cultural medium may change dramatically in the next century as will the way people participate in it, with the advent of interactive television.

The Ninth Report, Standing Committee on Canadian Heritage (June 1999) supports David Foot's suspicions that as the "population ages, the audience for cultural activities will likely increase" (Chapter 6). Roger Sauvé in his study *The Future of Canadian Household Spending to 2016*[5] has predicted the future level and growth of household spending from 1996 to 2016, for the 386 goods and services that make up the FAMEX Survey. Of the 13 major categories looked at by Sauvé, he predicts that reading materials and other printed matter will have the second highest growth rate during this period.

In the area of household furnishings and equipment, Sauvé suggests that original works of art will be the fastest growing item in the current period (1996-2001) while, by the 2011-2016 period, spending on original works of art will be the slowest growth item under household furnishings and equipment. In 1996, two-thirds of spending on original works of art was by the richest 20% of households. The 8% of households who bought original works of art in 1996 spent on average $450. Two-thirds of the expenditures in this category are made by the middle-age household segment of the population.

There is still a debate over whether the performing arts will grow or decline. Will the aging boomers be replaced by a large cohort who show as great an interest in such important areas of performing arts as classical music and opera? The authors of *Age and Arts Participation* state that "The future of the arts, depends critically upon their ability to compete for attention with a popular culture that is powerfully propagated by the mass media of radio, television, the movies, and the culture of the advertising and promotion in which they are enmeshed"[6].

In the future, adaptations and innovations will be needed by culture suppliers and supporters if they are to continue to attract their audiences. In the past, people have had to physically visit museums or libraries in order to use those facilities. In the ever-expanding world of virtual reality, virtual libraries and archives, museums, art galleries and books are changing not only the mode of delivery of culture but they may also influence the very choices we make for our limited leisure time.

5 *Sauvé, Roger,* The Future of Canadian Household Spending to 2016, *People Patterns Consulting, 1999.*

6 *Richard Peterson, Darren Sherkat, Judith Huggins Balfe, and Rolf Meyersohn,* Age and Arts Participation, *National Endowment for the Arts Research Report #34, Seven Locks Press, Santa Ana, California, 1996, p. 117.*

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A Profile of Libraries in Canada

Isme Alam, Culture Statistics Program

Canadian libraries have historically been vast warehouses of our nation's intellectual and literary wealth. They have been a vital resource contributing to our cultural heritage, identity and evolution. Today, as libraries become connected to the information super-highway, their role in the fabric of Canadian life and culture is being transformed. While the exact nature of their socio-economic impact is not well understood or documented fully, various indicators are available to portray the current state of the library system relative to its past. These indicators, when examined in perspective, may provide a window into the future of this sector. Specifically, indicators of reading and library usage, collections and library services, government and library spending, and employment will be addressed.

Reading and Library Borrowing for Leisure
The General Social Survey (GSS), a survey on the living conditions and well being of Canadians, revealed that 66% of Canadians[1] read a book for leisure in 1992 as compared with 61% in 1998. The proportion of the population reading magazines and newspapers for leisure also declined over this period (from 80% to 71% and from 92% to 82%). Similarly, borrowing materials (including books, magazines, audio or videotapes, cassettes etc.) from libraries for leisure dropped 9 percentage points, from 34% to 25%.

Does this consistently downward pattern indicate that Canadians are really reading less than before? Or, is it conceivable that owing to the increased popularity of the Internet over the last five years, books, magazines, newspapers and other print material have been replaced by electronic substitutes? Indeed, the data may not be reflecting so much a general decline in reading, but rather a transformation of the reading medium with the advent of the Internet.

1 *The GSS population includes individuals 15 years or older.*

Browsing the Internet, by necessity, involves the activity of reading. According to the 1998 GSS, 10% of the population used the Internet to read a book, magazine or newspaper for leisure. With 36% of households in 1998 reporting a member using computer communications in a typical month[2], there is a strong possibility that reading for leisure on the Internet could increase. The drop in library borrowing between 1992 and 1998 may in part be attributable to this phenomenon also.

In addition, 41% of Canadians are reading at least a book a month, while 62% are reading newspapers at least three times a week. Given this frequency, it is inconclusive as to whether Canadians are in fact reading significantly less than before. However, another factor potentially contributing to the apparent decline may be that other activities such as movie going, watching videos and attending live stage performances have increased over the period. Thus, owing to the diversification of leisure activities, there may actually be less time available for reading.

Although home Internet use for leisure has been rising, the GSS revealed that library Internet use in 1998 for leisure was minimal (2%). Perhaps libraries that are connected to the Internet have a limited number of connections and consequently reserve them for research, administration, or the provision of electronic information rather than for leisurely browsing. On the other hand, the availability of the wealth of reading materials in print form within libraries as compared to our homes may explain greater Internet use for leisure in homes than in libraries.

Based on the available data, generalizations about trends in literacy of Canadians cannot be made. The issue of literacy is more complex than appears on the surface. Bruce Powe, who wrote about the effects of the information explosion on the individual, noted that the definition of literacy has been evolving over many centuries. According to Powe, in the new millennium, a different concept of what it means to be literate will emerge due to the impact of the technological revolution.[3]

Library and Collection Use in Canada

Library use

According to the 1998 GSS, 28% of Canadians used libraries as a leisure activity. Fourteen percent visited libraries at least once a month while another 8% used libraries one to four times a year. The proportion of Canadians 15 and over borrowing library materials dropped, and the use of other library services is also low. For example, in 1998, only 1% of Canadians attended various programs offered in libraries (e.g. a reading, children's program, etc.). Another 8% of Canadians used libraries for research. This might appear somewhat surprising, given our shift towards a more knowledge-based society. The assumption is that, by necessity, this shift requires greater dependence on the access points to information. It is speculated that while a transition is taking place, the impact has not yet been manifested in terms of library use. The Internet is, however, a different story. The 1998 GSS reported that 30% of Canadians access the Internet for reasons other than for paid work or studies and two of ten Canadians are using the Internet specifically for research. These indicators suggest an increasing reliance on the Internet as a preferred access point for information.

While the GSS examines library use for leisure purposes, other information indicates a larger proportion of Canadians may be using libraries for non-leisure purposes. A 1997 study of public library use reported two-thirds of the population visited a public library in the previous year[4]. One out of five Canadians visited a library at least 12 times in the year.

Collection volume and circulation

The National Core Library Statistics Program (NCLSP)[5], co-ordinated by the National Library with the support of the Canadian Library Association and representatives of other library organizations, is a rich source of library statistics. Three years of data are available, covering 1994 through 1996. The types of libraries surveyed are university, college, public, provincial/ territorial, government, non-profit, for profit and the National Library of Canada. While it must be stated that the data source is by no means complete (especially for school and special libraries), it is the best available source of key indicators describing libraries.[6]

As reported in the NCLSP, average collection size[7] consisted of 23,000 items per library in 1994 compared to 25,000 items in 1996, representing a 9% increase. This growth in collections could not have occurred without a demand for them and/or the investment of additional resources.

Overall, roughly 300 million library-owned publications circulated through the Canadian population in1996 (print as well as other media) according to the NCLSP, up 9% from 1994. This matches the growth of collections. Although this figure shows a large degree of borrowing activity, better information on such indicators as library membership, personal visits, and electronic information access would further enrich this analysis.

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2 *Computer communication refers to the use of a computer connected to a communications network for things like electronic banking, E-mail and going on the Internet. Data from Statistics Canada's Household Internet Use Survey.*

3 *"Participants Share Ideas at School Library Symposium",* Feliciter, *Canadian Library Association, Volume 44, Number 1, January 1998.*

4 *Data obtained from a 1997 study commissioned by the Canadian Library Association,* Canadians, Public Libraries and the Information Highway*, Ekos Research Associates Incorporated, October 1998.*

5 *Data are obtained from two reports:* NCLSP: A Statistical Report of 1994 *by M. Kinnucan, University of Western Ontario, 1996; and a draft report,* NCLSP: A Statistical Report of 1996: Cultural and Economic Impact of Public, Academic, and Special Libraries*, by A. Schrader and M. Brundin.*

6 *There are several limitations to the data that must be noted. First, school libraries are not included. Second, not all libraries that received questionnaires responded to the survey. Third, not all of the responding libraries replied to each and every item on the questionnaire. Fourth, special libraries (consisting of government, profit and non-profit libraries) are under-represented. As a result of these factors, medians were deemed more stable indicators for analytical purposes than means. In addition, it is important to note that this source cannot be compared directly with data collected at Statistics Canada. The primary reason for this is that the concepts, definitions, and methods used to collect the data are not consistent. Until the issues of data quality and comparability are thoroughly investigated, caution is advised.*

7 *In the case of the NCLSP average refers to the median value.*

Some Indicators of the Supply and Demand for Information

Demand for service

The NCLSP reports that the average number of questions from patrons was 2,200 per library in 1994 versus 2,600 per library in 1996, a growth of 18%. This increase is in line with the changing demands being placed on libraries. More information is being sought and quicker turnaround times are expected. Through technological advances, libraries are working to keep up with this increased demand. In 1996 Canadians actually asked about 30 million questions in libraries, an average of 82,000 enquiries per day.

It is speculated that not only has the volume of demand for information increased, but the nature of the enquiries is also changing. Requests for information may require a greater skill level to handle them today than in the past. Technological change has meant that librarians must help patrons with locating information, retrieving it and maybe sorting it for them electronically. This requires more sophisticated training.

Supply of information

"Service points", defined as locations where library services are obtained[8], can be used to indicate one aspect of the supply of information. According to the NCLSP, the median number of service points per library remained constant over the 1994 to1996 period, at 3 per library. This seems reasonable since libraries have not faced complete closure except in a very few cases. Thus, libraries are faced with using the same number of service points to handle more enquiries and possibly a greater demand for their growing collections.

Government Spending on Libraries

Each year, the federal government provides funding to the National Library of Canada. The provincial governments transfer funds to the municipalities for libraries. In addition, municipal governments spend from their own budgets on libraries. It is important to bear in mind that government expenditures at one level may in part become revenue for another level.

Share of government culture spending going to libraries

Of the $5.9 billion spent by governments on culture in 1997-98[9], $1.9 billion was spent on libraries, representing 32% of total government spending on culture (refer to Table 1). This share has remained fairly stable since 1991. While spending on libraries as a proportion of total culture spending at the federal level was 1%, the respective shares for the provincial/territorial and municipal levels were 39% and 80%. Thus, the largest percentage of the culture budget going to libraries is at the municipal level.

Spending by level of government

The significance of municipal government spending on libraries is also abundantly clear from Table 1. Roughly $1.2 billion was spent in 1997-98 on libraries at the municipal level alone, representing 63% of all government expenditures on libraries. Municipal governments clearly bear the lion's share of the cost of funding libraries. They fund both public and school libraries. Provincial/territorial and federal shares in 1997-98 were 35% and 2%, respectively.

Trends in government spending

Budget reductions have become commonplace in all segments of the economy dependent on government funding. Libraries are no exception. While governments increased total spending on libraries by 15% in the1990-91 to1997-98 period, expenditures varied over the years by level of government, as shown in Table 2. The largest drop over the period occurred at the federal level (-20%), while the provincial/territorial decline was lower (-3%). Municipal increases of 31% helped to mitigate these declines. In the five years prior to 1997-98, however, total library expenditures grew only by 1%. Federal library expenditures dropped dramatically in 1994-95 (by 21%), and again in 1996-97 (-11%). The decline at the federal level was due in large measure to a reduction of operating and capital funds by roughly 33% over the five years. At the provincial/territorial level the more modest drops were owing to a 10% decline in operating and capital funds and a 12% decrease in grants, contributions and transfers.

Expenditures by municipalities rose by almost 31% between 1990-91 and 1997-98; in the last five of those years municipal library expenditures rose by 12%, continuing their position as the most significant player relative to the other levels of government.

Library Spending

According to the NCLSP data, median library expenditures remained unchanged at $127,000 per library between 1994 and 1996. Despite this stability, some changes in the allocation of library budgets occurred in collections, technological infrastructure and other operating and capital costs. In fact, collections expenditures as a share of the total budget rose from 15% to 22% between 1994 and 1996. However, the share of the total budget allocated to staff wages and salaries has remained stable at roughly 60%. Thus, some of the other expenditures were reduced to balance the increased spending for collections.

[8] *Specifically, a service point is any part of a library or library system, i.e. main library branches and bookmobiles, at which a direct service for users is provided in the physically contained quarters. It should have a collection of library materials and staff, and may be housed in separate premises from other services points.*

[9] *In this context, culture includes libraries, museums, archives, historic and nature parks, arts education, books and periodical publishing, performing arts, visual arts and crafts, film and video, broadcasting, sound recording, and multiculturalism.*

Table 1

Expenditures on Libraries and Culture by Level of Government, 1997-98

Level of government	$ on libraries	$ spent on culture	Share of total library spending	Share of spending on culture devoted to libraries
	($ thousands)	($ thousands)	%	%
Federal	31,763	2,668,189	2	1
Provincial/Territorial	664,735	1,716,017	35	39
Municipal[1]	1,182,045	1,480,069	63	80
Total[2]	**1,878,543**	**5,864,275**	**100**	**32**

Source: *Statistics Canada.*

[1] *Municipal spending is on a calendar year basis.*

[2] *Includes inter-governmental transfers of about $304 million.*

Table 2
Governments Expenditures on Libraries 1991-92 to 1997-98 ($thousands)

	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	% change 1990-91 to 1997-98	% change 1993-94 to 1997-98
Federal	39,733	40,668	41,326	47,452	37,519	36,886	32,920	31,763	-20	-33
Provincial/Territorial	688,426	723,810	730,379	754,618	706,517	698,078	665,642	664,735	-3	-12
Municipal[3]	899,301	961,180	1,021,380	1,052,965	1,105,798	..	1,094,368	1,182,045	31	12
Total expenditures[1,2]	**1,627,460**	**1,725,658**	**1,793,085**	**1,855,035**	**1,849,834**	**..**	**1,792,930**	**1,878,543**	**15**	**1**

Source: *Statistics Canada.*
1 *Includes elementary school, secondary school, university, college, public, provincial and national libraries.*
2 *Total expenditures include inter-govenmental transfers. Total transfers for all culture-related activities including libraries, museums, performing arts, etc.*
3 *Municipal expenditures are reported on a calendar year basis.*

By far the greatest expenditures were made by the public libraries, followed by academic libraries. These accounted for 50% and 37% of total library expenditures in 1996, a similar distribution to that of two years earlier.

Trends in Employment of Librarians
In the past, employment as a librarian was typically linear in that a graduate of library studies found a job in a library and followed an upward progression until retirement. Today, however, the path is more circuitous and therefore requires that graduates be flexible and have extremely varied interests to do their jobs. In addition, it is critical that apart from the necessary communication and management skills, they must be comfortable with technology.[10]

While there is a dearth of statistics examining the way in which the profession is changing, some information on patterns of library employment is available from the Labour Force Survey (LFS)[11] and the NCLSP. Similar information is also available for technical library occupations. It is important to keep in mind that data reported from the LFS are based on a respondent's description of their work and an interviewer's assessment of the primary occupational classification of individuals. As a result, it is possible that some library technicians may identify themselves as librarians, thereby inflating the actual numbers somewhat. Also, it is important to remember that the NCLSP uses a different conceptual framework for data collection. Therefore, caution is advised when comparing the two data sources.

Librarians and technicians
According to the NCLSP, the number of full-time equivalent (FTE)[12] library staff rose from 20,000 to 25,000 between 1994 and 1996. Over 5,200 FTE library staff were librarians in 1996, and over 2,500 were library technicians[13]. This distribution remained fairly stable over the period.

According to the LFS over 70% of librarians were employed in full-time jobs in 1998, the remainder holding part-time positions. Over half the library/archival technicians and assistants worked in full-time positions.

Gender distribution
Library occupations have traditionally been female-dominated. LFS data support this notion, showing that in1998 roughly 80% of librarians were women as compared to 45% in other culture occupations and in the labour force in general. A similar distribution occurred for library/archival technicians and assistants.

Age distribution
Almost 70% of librarians in the Canadian labour force were between 35 and 54 years of age in 1998. This reflects the general aging of the population and is common to many occupations, including culture workers. The age distribution of library/archival technicians in the LFS, although not identical, was similar to that of librarians.

Educational background
Fifty-seven percent of librarians were university degree holders in 1998, a proportion higher than that of other culture workers and more than double that of the entire labour force. Actually, over 90% of librarians in 1998 had some post-secondary education. Due to the method of classification of librarians in the LFS, some individuals classed as professional librarians were actually technicians as defined by NCLSP; in fact, a large proportion of librarians in the LFS reported having graduated from community college programs only and had university certification as opposed to degrees.

Educational backgrounds of technicians were quite different, with 76% having no university degree. This is not surprising given that these positions require a different skill set than the one required for librarians.

10 *"New Librarians: Recent Graduates on Library Studies and Work",* Feliciter*, Canadian Library Association, Volume 44, Number 9, September l998.*
11 *LFS data use occupational concepts from the 1991 Standard Occupational Classification (SOC). Librarians in the SOC are defined as those occupations primarily concerned with developing, organizing and maintaining library collections and providing advisory services for library users (including supervisors or library consultants). Excluded are managers, directors or administrators of libraries, who are grouped as library, archive, museum and art gallery managers. Elementary and secondary school librarians are classified as teachers. Medical health records librarians are classified with records and file clerks. Computer tape or cassette librarians are classified as computer operators. Additionally, due to the structure of the SOC, the LFS data on library technicians and assistants are aggregated with archival technicians and assistants. Consequently, separate breakdowns are not available.*
12 *FTE staff numbers include paid staff that are full-time, part-time, regular, temporary, casual, and student employees.*
13 *According to the NCLSP, a librarian is an individual with a Master's degree from a library education program accredited by the American Library Association or its equivalent. Technicians are defined as paraprofessional staff members possessing a technical certificate and/or diploma acquired from an accredited Library Technician program.*

Job prospects

Statistics Canada's National Graduate Survey (NGS) examined the transition of 1995 graduates from library science and record science programs[14] into librarian and archivist occupations. According to the NGS, roughly 77% found full-time employment as librarians and archivists in 1997. Half of all graduates finding employment earned at least $32,000 annually.

Connectivity of Libraries to the Internet

As information technology becomes increasingly pervasive in the delivery of library services, it is important to examine the extent to which libraries are connected to the Internet. More and more, we are evolving towards the electronic library as advances are made in Web technology. This has created rich opportunities for libraries to offer new services. Librarians are challenged to produce Web pages so that information is organized for retrieval in an efficient manner. They are also pioneering efforts to provide the links to information so that patrons can have the most timely access possible.

In1996-97, the Electronic Publications Pilot (EPP)[15] study gathered information on how Depository Service Program (DSP) libraries and their clients are adapting to the Internet. The study found that almost 100% of government libraries were connected to the Internet, followed by 98% of academic libraries and 93% of public libraries. However, all sectors agreed that more resources and training were necessary for successful transition into the information age.

Librarians in this study reported a shortage of resources such as hardware, software, and financial and human resources. All of these are inter-dependent, because the lack of financial resources affects a library's ability to purchase or upgrade hardware, and staff shortages reduce the time that librarians have to learn the new technologies.

Although comprehensive information on the connectivity of Canadian libraries to the Internet is currently not available, the SchoolNet program under Industry Canada maintains data for libraries under provincial jurisdiction[16]. Connectivity, for the purposes of this database, is defined as a school or library having at least one computer with access to at least one Internet service (e-mail, file transfer protocol or Web). The data indicate that as of April 1999, roughly 97% of provincially funded public libraries across Canada were hooked up to the Internet.

Facing the Future: Reading Between the Lines

There is an apparent trend that Canadians are reading and borrowing less for leisure. However, visits to libraries for all purposes appear to be more frequent. The demand for information is increasing, while the number of locations offering services has not changed. Collections are growing and their use is rising.

Spending on libraries has declined at the federal and provincial/territorial levels at the same time as municipalities continue to bear the brunt of the cost of running and operating libraries.

Given our knowledge-driven society, it is not an unlikely assumption that libraries will potentially have a pivotal role to play in our competitiveness in the global economy. Undoubtedly, they are a crucial gateway for information. Libraries, in concert with learning institutions and other partners, also play an essential role in the advancement of our literacy. How will they meet their patrons' demands for information with limited resources? How will they adapt to technological advance without competing directly with it? What will the libraries of the future look like? How libraries rise to these and other challenges will ultimately shape their survival and success in the new millennium.

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[14] *Record science programs include medical records science, archive maintenance, museology, art gallery administration, museum curatorship and other records science.*

[15] Electronic Publications Pilot 1996-1997, Final Report. *Catalogue No. 11-534-RPE, May 1999, Ottawa.*

[16] *Industry Canada's SchoolNet program is in conjunction with the provincial Ministries of Education.*

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