



# The Daily

Statistics Canada

**Tuesday, December 1, 1998**

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## MAJOR RELEASES

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- **Film, video and audio-visual production, 1996/97** 2  
The independent film, video and audio-visual production industry experienced another year of strong revenue growth in 1996/97, surpassing records for total revenue, production revenue and exports set the previous year. Total revenues reached \$1.3 billion while production revenues were \$967 million.

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## MAJOR RELEASES

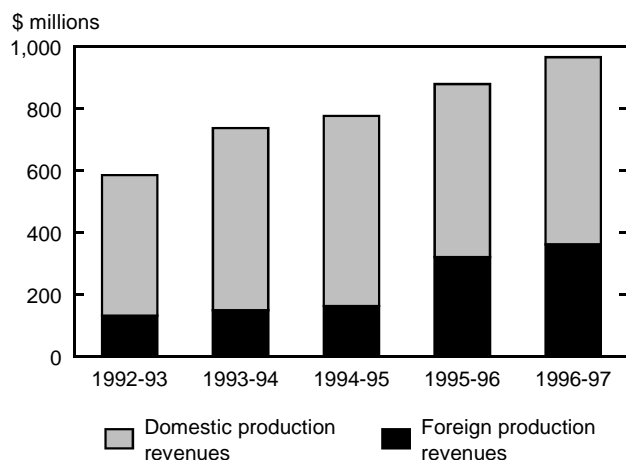
### Film, video and audio-visual production

1996/97

The independent film, video and audio-visual production industry experienced another year of strong revenue growth in 1996/97, surpassing records for total revenue, production revenue and exports set the previous year.

Total revenues advanced 4.8% to \$1.3 billion. This growth was driven almost entirely by a 10% increase in production revenues, which hit \$967 million. And after doubling in 1995/96, exports increased a further 12.7% in 1996/97 to \$361.5 million. As in previous years, television programming led exports, accounting for almost two-thirds of the total. About 15% of export revenues came from distributors of theatrical features.

**Export growth has driven film and video production revenue growth**



The 10% increase in production revenues was equivalent to about \$88 million. One-half of this growth was due to higher sales related to television, while one-quarter was due to higher theatrical film revenues. Advertising accounted for a further 13%, while government, educational and industrial video sales were stable.

Meanwhile, non-production revenues declined 8.3% to \$318 million. This category includes revenues from the rental of production facilities, laboratory and post-production services and distribution of other producers' products. Most of this decline was the result

#### Note to readers

This release summarizes the results of the 1996/97 survey of 625 film, video and audio-visual production companies and 192 motion picture laboratories and post-production companies in the Canadian film and video industry. The data does not include location shootings in Canada by foreign film producers, production data from the National Film Board, nor in-house productions by television stations.

The theatrical market represents films shown to paying audiences in regular motion picture theatres and drive-ins. The non-theatrical market comprises productions sponsored by advertising agencies, education institutions, government boards, agencies, crown corporations or departments, and the industry at large.

Television services include conventional, specialty and pay television.

The post-production services sector includes companies primarily engaged in processing and duplicating motion picture films and providing video production facilities.

Non-production revenues include revenues from the rental of production facilities, including equipment and personnel, laboratory and post-production services, distribution of other producers' products, other operating revenue and non-operating revenues including non-repayable financial aid, dividends and other non-operating revenues excluding equity investment and loans.

Foreign sales consist of revenues received from foreign clients for current and previous years' productions, including license fees and royalties, outright sales and rentals, contracts, sponsors' payments and remittances from distributors after their expenses. Sales to foreign markets through Canadian distributors are not included in foreign sales.

of lower non-repayable financial aid and revenues from the distribution of other producers' products.

### Film, video and audio-visual production 1992/93 and 1996/97

	1992/93	1995/96	1996/97	1995/96 to 1996/97
	\$ million			% change
Production revenue				
Exports	132.0	320.8	361.5	12.7
Non-exports	454.4	558.4	605.5	8.4
Sub-total	586.4	879.2	967.0	10.0
Non-production revenue	111.0	347.0	318.1	-8.3
Total revenue	697.4	1,226.2	1,285.1	4.8
Total operating expenses	637.0	1,166.3	1,199.2	2.8
Profit	60.4	59.9	85.9	43.4
Profit as a % of total revenues	8.7	4.9	6.7	36.7

## Ontario led independent production

Ontario, already the leader among Canadian provinces in independent production, increased its share of the market in 1996/97. Ontario-based producers accounted for 63% of production revenue, up from 57% the year before. Ten of the 20 largest producers are based in Ontario.

In terms of the export market, Ontario-based companies earned 81% of export revenues. During the past five years, Ontario has never earned less than two-thirds of the export revenues in any given year. The province's strength in exports can be attributed to the concentration of large producers specializing in television production. About 64% of Ontario exports originated from television sales.

Companies based in Quebec, the second largest producer of film, video and audio-visual products, earned 25% of all production revenues and 22% of total revenues. However, they earned only 15% of export revenues, a fact that may be related to the size of their television producers and their concentration on French-language productions. About 95% of Quebec independent television productions were in French.

Growth was also strong in Atlantic Canada, Saskatchewan and Manitoba, but these areas still account for only about 3.8% of independent Canadian production. Although many areas of Canada are also popular with foreign-based companies shooting feature films and television series, this activity is not covered by this survey which includes only Canadian-based companies.

## Strong growth in employment

In 1996/97, employment in the industry reached 18,742 employees, with 20% of the positions being full time. The industry wage bill (including benefits) was \$283 million, an increase of 8.9% from 1995/96 and up 44% from 1992/93.

## Laboratories, production and post-production services

The post-production industry, an important complement to production, also grew. Operating revenues increased 4.1% to \$503.6 million in 1996/97, the first year in which they topped the half-billion-dollar mark.

The major revenue generating activities in this industry were film processing (\$139 million), duplication and transcoding (\$113 million) and dubbing and subtitling (\$56 million).

Employment declined 25.2% from 1995/96, but was still well above previous years. The industry employed 3,725 workers in 1996/97, of which over two-thirds were full-time. Salaries and wages, benefits, and freelancer fees surpassed \$131.8 million.

The regional distribution of the industry was similar to that of film production with 67% of industry revenues earned by Ontario-based firms. Quebec-based firms earned one-quarter of revenues, and firms in the rest of Canada accounted for only 8% of revenues.

## Film laboratories, production and post-production services industry 1992/93 and 1996/97

	1992/93	1995/96	1996/97	1995/96 to 1996/97
	\$ million			% change
Operating revenue	309.8	483.8	503.6	4.1
Operating expenses	294.8	403.0	419.1	4.0
Profit	15.0	80.8	84.5	4.6
Profit as % of operating revenue	4.8	16.7	16.8	0.6

For further information, or to order tables, or to enquire about the concepts, methods and data quality of this release, contact Michael Pedersen (613-951-3305, fax: 613-951-9040, [pedemic@statcan.ca](mailto:pedemic@statcan.ca)), Culture Statistics Program, Culture, Tourism and the Centre for Education Division. ■

## OTHER RELEASES

**Department store sales and stocks**

October 1998

Department store sales remained unchanged in October at \$1.4 billion (seasonally adjusted). Since the spring of 1998, monthly department store sales have been relatively volatile, but overall sales have generally been flat. Sales may have levelled off in recent months due, in part, to the closure of 51 department stores since March 1998 (the last peak in seasonally adjusted department store sales).

Prior to the recent closure or conversion of department stores, sales experienced a period of strong advances from the summer of 1996 to the spring of 1997, following a period of gradual advances from mid-1993.

Department store sales were 4.8% (adjusted) higher in October compared with the same month last year. Cumulative year-to-date sales were 7.2% (adjusted) higher than the same period last year.

**Department store sales including concessions**

	Oct. 1997	Oct. 1998	Oct. 1997 to Oct. 1998	Jan. to Oct. 1998	Jan.-Oct. to Jan.-Oct. 1998
	unadjusted				
	\$ millions		% change	\$ millions	% change
<b>Canada</b>	<b>1,427.2</b>	<b>1,494.8</b>	<b>4.7</b>	<b>12,425.3</b>	<b>7.0</b>
Newfoundland and Prince Edward Island <sup>1</sup>	28.2	29.2	3.5	226.3	6.8
Nova Scotia	46.7	48.3	3.5	377.0	6.1
New Brunswick	36.7	37.2	1.4	282.7	5.5
Quebec	262.7	273.6	4.2	2,307.5	6.7
Ontario	591.3	633.1	7.1	5,235.8	8.2
Manitoba	59.8	62.5	4.6	519.3	7.6
Saskatchewan	45.9	50.0	9.0	414.0	9.5
Alberta	165.0	173.0	4.9	1,458.0	10.8
British Columbia, Yukon, Northwest Territories <sup>1</sup>	191.0	187.9	-1.7	1,604.8	0.5

<sup>1</sup> For reasons of confidentiality, data for Newfoundland and Prince Edward Island, and British Columbia, the Yukon and Northwest Territories are combined.

Unadjusted for seasonality, department store sales increased in all provinces in October compared to the same period last year with the exception of British Columbia (-1.7%). Saskatchewan (+9.0%) led

all provinces in year-over-year sales gains in October, followed by Ontario (+7.1%) and Alberta (+4.9%).

**Available on CANSIM: matrices: 111-113.**

For data or general information, contact the Client Services Unit (613-951-3549; 1 877 421-3067, [logener@statcan.ca](mailto:logener@statcan.ca)). For analytical information, or to enquire about the concepts, methods and data quality of this release, contact Jeff Fritzsche (613-951-2812; [fritjef@statcan.ca](mailto:fritjef@statcan.ca)), Retail Trade Section, Distributive Trades Division. ■

**Monthly Survey of Large Retailers**

August and September 1998

Sales for large retailers hit \$5.6 billion in both August and September, a year-over-year increase of 2.9% in August and 8.8% in September.

In August, sales by large retailers reached \$5.6 billion, up 4.8% compared with August 1997. This exceeded the 0.4% year-over-year increase for total retail trade excluding motor and recreational vehicle dealers. (All data in this report are unadjusted for seasonality). However, this was the smallest year-over-year increase since the beginning of the year for large retailers.

Major product line sales, which increased the most compared with August 1997, were housewares (+10.9%) and health and personal care products (+10.5%). These two lines represented 11.5% of total sales of the large retailers surveyed.

Sales of home furnishings and electronics (+3.7%) and footwear, clothing and accessories (+3.6%) posted moderate increases. These products together accounted for 34.8% of the total sales. Food and beverages, with the largest share of total sales (+35.7%), posted a slight increase (+1.0%).

Two commodity categories decreased compared with August 1997. Hardware and lawn and garden products were down (-0.2%). Sporting and leisure goods decreased the most (-3.3%) compared with the same month last year. This contrasted with year-over-year increases in sales in May, June and July for sporting and leisure goods.

Sales in September were \$453 million higher (+8.8%) than the same month in 1997. This compares with a 3.6% increase for total retail trade, excluding motor and recreational vehicle dealers.

Strong growth in sales occurred across all products. For the second consecutive month, housewares (+19.0%) and health and personal care products (+18.4%) continued to post the largest increases.

Food and beverage sales, which represented 35.9% of the total sales had the third highest increase (+9.5%). Of the food components, fresh fish and seafood had the highest growth in sales (+23.3%), followed by dairy products and eggs (+17.0%) and frozen foods (+13.3%). Alcoholic beverages sold in food stores advanced 25.6% over last year.

Purchases of sporting and leisure goods increased 9.3% while sales of footwear, clothing and accessories advanced 7.5%. Home furnishings and electronics (+5.1%) and hardware and lawn and garden products (+4.0%) posted the smallest gains.

#### Sales by commodity for the group of large retailers August 1998

	Aug. 1997	Aug. 1998	Aug. 1997 to Aug. 1998
unadjusted			
	\$ 000,000		% change
<b>Commodities</b>			
Food and beverages	1,963	1,982	1.0
Health and personal care products	342	377	10.5
Housewares	238	264	10.9
Footwear, clothing and accessories	1,154	1,196	3.6
Home furnishings and electronics	710	736	3.7
Hardware and lawn and garden products	182	182	-0.2
Sporting and leisure goods	227	220	-3.3
All other goods and services	579	592	2.2
<b>Total</b>	<b>5,396</b>	<b>5,550</b>	<b>2.9</b>

The Monthly Survey of Large Retailers provides a breakdown of sales on the basis of commodities at the national level for a group of about 80 large retailers, who were included in the survey based on their sales and retail sector.

The survey includes large retailers mainly in the food, clothing, home furnishings, electronics, sporting goods, and general merchandise sectors. Sales data for more than 100 commodities are available, on a monthly basis, split wherever possible, by three types of retailer (food stores, department stores and other).

Data is available from January 1997 forward from Distributive Trades Division. A list of those retail companies involved in the survey is also available. It

is not intended that this survey represent all of retail trade but only this group of large retailers.

Data have not been adjusted for seasonality, or changes due to differences in the number or significance of shopping days contained in the various months of the year. For example, the number of Saturdays, normally a heavy shopping day, may differ from month-to-month or year-over-year.

#### Sales by commodity for the group of large retailers September 1998

	Sept. 1997	Sept. 1998	Sept. 1997 to Sept. 1998
unadjusted			
	\$ 000,000		% change
<b>Commodities</b>			
Food and beverages	1,829	2,002	9.5
Health and personal care products	330	391	18.4
Housewares	229	272	19.0
Footwear, clothing and accessories	1,104	1,187	7.5
Home furnishings and electronics	719	755	5.1
Hardware and lawn and garden products	171	178	4.0
Sporting and leisure goods	208	228	9.3
All other goods and services	536	566	5.7
<b>Total</b>	<b>5,126</b>	<b>5,579</b>	<b>8.8</b>

For data or general information, contact the Client Services Unit (1 877 421-3067; 613-951-3549). To enquire about the concepts, methods and data quality of this release, contact Veronica Utovac (951-0669; [utovver@statcan.ca](mailto:utovver@statcan.ca)), Retail Commodity Section, Distributive Trades Division. ■

#### Domestic sales of refined petroleum products

October 1998 (preliminary)

Sales of refined petroleum products totalled 7 976 200 cubic metres in October, up 1.0% from the same month a year earlier. Sales increased for four of the seven major product groups over the same period in 1997, with the largest gains recorded for heavy fuel oil (+117 800 cubic metres or +19.4%), petrochemical feedstocks (+62 200 cubic metres or +21.4%) and motor gasoline (+29 900 cubic metres or +0.9%). The large year-over-year increase in petrochemical feedstocks is mostly attributable to a return to normal levels following a temporary shutdown of a refinery in October last year. The largest decrease was recorded for diesel fuel oil (-77 400 cubic metres or -3.9%).

Year-to-date sales of refined petroleum products were up 1 569 200 cubic metres or 2.1% over the same period in 1997. Sales increased for five of the seven major product groups. The advance for heavy fuel oil (+1 093 200 cubic metres or 19.3%) was due to greater use of the product for the generation of electricity. The increase for motor gasoline (+859 700 cubic metres or +2.8%), which accounted for 40.6% of the total, was mainly explained by lower retail prices and favourable weather. As a result of unseasonably mild temperatures since the beginning of 1998, sales of light fuel oil fell 17.5% (-760 700 cubic metres).

### Sales of refined petroleum products

	Oct. 1997 <sup>r</sup>	Oct. 1998 <sup>p</sup>	Oct. 1997 to Oct. 1998
	thousands of cubic metres		% change
<b>Total, all products</b>	<b>7,898.6</b>	<b>7,976.2</b>	<b>1.0</b>
Motor gasoline	3,153.0	3,182.9	0.9
Diesel fuel oil	1,970.6	1,893.2	-3.9
Light fuel oil	402.9	335.3	-16.8
Heavy fuel oil	606.5	724.3	19.4
Aviation turbo fuels	489.9	489.7	-0.0
Petrochemical feedstocks <sup>1</sup>	291.3	353.5	21.4
All other refined products	984.4	997.3	1.3

	Jan. 1997 to Oct. 1997 <sup>r</sup>	Jan. 1998 to Oct. 1998 <sup>p</sup>	Jan.-Oct. 1997 to Jan.-Oct. 1998
	thousands of cubic metres		% change
<b>Total, all products</b>	<b>75,438.0</b>	<b>77,007.2</b>	<b>2.1</b>
Motor gasoline	30,393.1	31,252.8	2.8
Diesel fuel oil	17,877.8	17,979.0	0.6
Light fuel oil	4,358.4	3,597.7	-17.5
Heavy fuel oil	5,658.3	6,751.5	19.3
Aviation turbo fuels	4,933.5	5,038.3	2.1
Petrochemical feedstocks <sup>1</sup>	3,766.1	3,959.0	5.1
All other refined products	8,450.8	8,428.9	-0.3

<sup>r</sup> Revised

<sup>p</sup> Preliminary

<sup>1</sup> Materials produced by refineries that are used by the petrochemical industry to produce chemicals, synthetic rubber and a variety of plastics.

**Available on CANSIM: matrices 628-642 and 644-647.**

The October 1998 issue of *Refined petroleum products* (45-004-XPB, \$21/\$206), will be available in January. See *How to order publications*.

For further information, or to enquire about the concepts, methods and data quality of this release, contact Michel Palardy (613-951-7174; [palamic@statcan.ca](mailto:palamic@statcan.ca)), Energy Section, Manufacturing, Construction and Energy Division. ■

### Asphalt roofing

October 1998

Production of asphalt shingles totalled 3 677 429 metric bundles in October, a 13.6% increase from 3 238 084 metric bundles produced a year earlier.

Year-to-date production amounted to 36 373 547 metric bundles, a 2% decrease from 37 102 348 metric bundles produced during the same period in 1997.

**Available on CANSIM: matrices 32 and 122 (series 27).**

The October 1998 issue of *Asphalt roofing* (45-001-XPB, \$7/\$62) will be available shortly. See *How to order publications*.

For further information, or to enquire about the concepts, methods and data quality of this release, contact Don Grant (613-951-5998; [grantdo@statcan.ca](mailto:grantdo@statcan.ca)), Manufacturing, Construction and Energy Division. ■

## PUBLICATIONS RELEASED

**Crude petroleum and natural gas production,**  
August 1998  
**Catalogue number 26-006-XPB**  
(Canada: \$19/\$186; outside Canada: US\$19/US\$186).

**Consumption of containers and other packaging  
supplies by the manufacturing industries, 1996**  
**Catalogue number 31-212-XPB**  
(Canada: \$29; outside Canada: US\$29).

**Retail trade, September 1998**  
**Catalogue number 63-005-XPB**  
(Canada: \$21/\$206; outside Canada: US\$21/US\$206).

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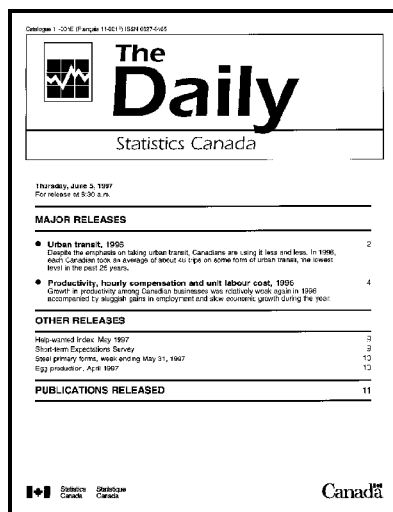
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