



The Daily

Statistics Canada

Friday, March 27, 1998

For release at 8:30 a.m.

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- **Film, video and audio-visual production, 1995/96** 2
 Canada's film and video industry has set another record for annual sales in the wake of soaring sales to foreign markets. Production revenues reached \$867.6 million in 1995/96 as foreign sales doubled.

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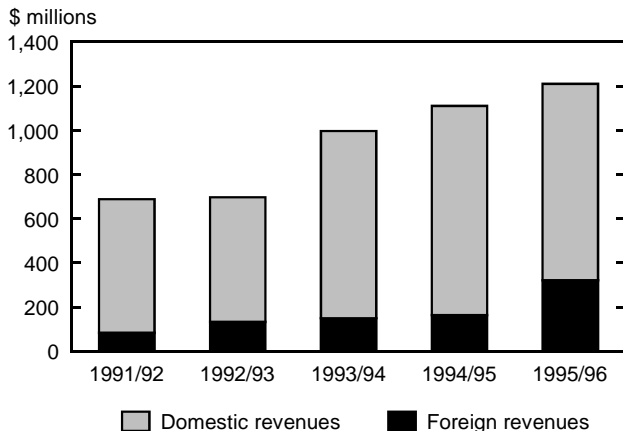
MAJOR RELEASES

Film, video and audio-visual production 1995/96

Canada's independent film and video industry has set another record for annual sales in the wake of soaring sales to foreign markets. Film and video production revenues reached \$867.6 million in 1995/96, up 8.8% from a year earlier and the third straight large annual increase. The increase was due almost entirely to foreign sales, which doubled in a single year to \$320.7 million. Television programming accounts for the majority of foreign sales.

Foreign sales, the fastest growing area of the film and video industry, were \$82.8 million in 1991/92. Foreign sales doubled over the following three years before doubling again in 1995/96. Foreign sales may actually be understated because sales to foreign markets are also made through Canadian distributors.

Foreign sales quadrupled in five years as total revenue almost doubled



Foreign sales were key to robustness in the film and video production industry. Without the growth in foreign sales, production revenue would have declined by \$87.4 million.

Despite this activity, industry profits fell for the second straight year in 1995/96. They were down 10.6% to \$57.3 million, mainly due to a 10.2% increase in operating expenses. Profit as a percentage of total revenue reached a five-year low of 4.7%.

Note to readers

This release summarizes the 1995/96 results of censuses of 591 film, video and audio-visual production companies and 226 motion picture laboratories and post-production companies in the Canadian film and video industry.

The theatrical market represents films shown to paying audiences in regular motion picture theatres and drive-ins. The non-theatrical sector 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. Post-production services include companies primarily engaged in processing and duplicating motion picture films and providing video production facilities.

The data in this release do not include location shootings in Canada by foreign film producers, production data from the National Film Board, nor in-house productions by television stations.

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. Location shooting by foreign producers is not covered by the survey.

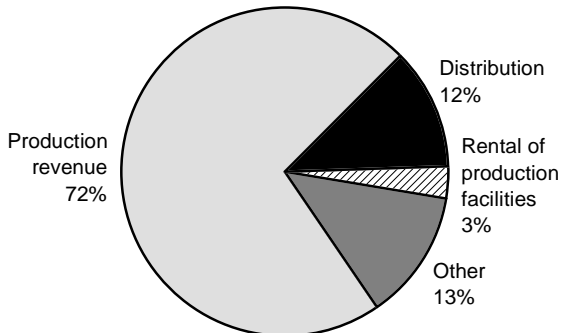
Television production accounted for the largest component of direct foreign revenues. Combined sales for conventional, specialty and pay television reached \$189.5 million.

Significant increase in total revenue

Total revenue for the independent film and video industry, including non-production sources, reached \$1.2 billion in 1995/96, up from \$1.1 billion the previous year.

More than one-quarter of all revenues came from non-production sources including distribution of other companies' productions (12.1%) and facility rental (2.8%). Overall, non-production revenues increased by 9.5%, slightly higher than production revenue at 8.8%.

Production revenues account for almost three-quarters of total revenue, 1995/96



Over the last year, the number of producers decreased by 16.3% due to the consolidation of smaller companies. The revenues of the top 50 companies rose from \$763.8 million, or 68.8% of total revenues, to \$978.7 million or 80.9% of total revenues.

Film and video producers reported 6,894 television productions in 1995/96, up 26% from the previous year. The creation of a number of new specialty cable channels in 1995 may help explain the growth in the number of television productions. Pay and specialty services, as a group, reported growth of program acquisition expenses of 30.3% from 1994 to 1995 to \$265 million.

The number of theatrical features produced reached a four year high of 53.

The production of educational videos was up slightly, but this was outweighed by significant declines in the number of television commercials and corporate videos. Television commercials and corporate videos are the major production areas outside of film and television program production.

Despite the growth in revenues in the industry, salaries and wages fell 2.2% from their historic high in 1994/95 to \$253.3 million in 1995/96. Full-time employment held relatively steady at 3,502 positions, while part-time employment declined 7% to 2,163. The number of freelance positions grew by 4.1% to 10,260.

Regionally, the data show that 1995/96 was an especially good year for growth in Quebec. Total revenues in the Quebec film, video and audio-visual industry grew by 48% to \$304 million. With \$770.7 million in total revenues, Ontario producers claimed almost two-thirds of national revenues. British Columbia and Alberta were the next leading producers with 4.4% and 4.8% of national revenues, respectively. These

revenue figures do not include location shooting by foreign film producers.

Film, video and audio-visual production

	1991/92	1994/95	1995/96	1994/95 to 1995/96
	\$ millions			% change
Production revenue				
Exports	82.8	163.1	320.7	96.6
Non-export	499.0	634.3	547.0	-13.8
Sub-total	581.8	797.4	867.7	8.8
Non-production revenue	106.4	312.4	342	9.5
Total revenue	688.2	1,109.8	1,209.7	9.0
Total operating expenses	611.9	1,045.7	1,152.3	10.2
Profit	76.3	64.1	57.4	-10.6
Profit as % of total revenues	11.1	5.8	4.7	-19.0

Post-production — A growing industry

The post-production industry, an important complement to the production industry, performs many activities that are integral to film and television production, including printing, editing, dubbing and the creation of special effects.

Given its integral relationship to the production industry, it is not surprising to see a growth pattern in the film and video post-production industry similar to that in the production industry. The number of firms and the employment and revenues of those firms were all up sharply over 1994/95.

The number of firms engaged primarily in post-production work was up by 72 to 226. The growth in the number of firms was strong in Quebec (with 9 new firms to total 55) but was even stronger in Ontario, where two-thirds of post-production activity occurs (38 new firms to total 123).

Salaries and wages rose over 1994/95 by 22.3%. The fees paid to free lancers doubled, and now make up 11% of salaries and wages in the industry. Unlike the production industry where two-thirds of employment is in the form of free lance contracts, 56% of post production staff are full time.

Operating revenues grew by 21.1% in the most recent survey year to \$483.8 million, with a total growth of 68.6% in the last five years. Expenses also grew strongly (from \$342.3 to \$403 million) and profit as a percentage of revenues was 16.7% for the industry as a whole.

An increase in the production of special effects was likely a major factor driving the growth in post-production. Capital expenditures on new machinery

and equipment in 1995/96 were almost \$52 million, an increase of two and a half times over the capital expenditures 1993/94. This expenditure growth suggests the industry is becoming high tech and more focussed on computer-generated special effects.

Film laboratories, production and post-production services industry

	1991/92	1994/95	1995/96	1994/95 to 1995/96
	\$ millions			% change
Operating revenue	286.9	399.5	483.8	21.1
Operating expenses	266.3	342.3	403.0	17.7
Profit	20.6	57.2	80.8	41.3
Profit as % of operating revenue	7.2	14.3	16.7	16.8

The publication *Film and video* has been discontinued. Selected details from the Film, Video and Audio-visual Production Survey and from the Motion Picture Laboratory Operations and Post-production Services Survey are now available in table format (\$50). These tables include breakdowns by province and territory and type of producer. Custom tabulations are available on a cost-recovery basis. A summary of the data up to 1994/95 appears in the publication, *Canada's culture, heritage and identity: A statistical perspective* (87-211-XPB, \$31). See *How to order publications*.

For further information on this release, or to order tables, contact Michael Pedersen (613-951-3305; fax: 613-951-1569; Internet: pedemic@statcan.ca), Culture Statistics Program, Culture, Tourism and the Centre for Education Division. ■

OTHER RELEASES

Employment, earnings and hours

January 1998 (preliminary)

Average weekly earnings increased in January, rising 0.7% to stand at \$605.23. Compared with one year ago, average earnings increased by 1.4%. Earnings increased in most industries in January with notable strength in transportation, communications, and other utilities. Almost all of the earnings gain in this industry was due to increased overtime for electric power systems workers in Quebec and Ontario making repairs following the ice storm.

Average weekly hours for hourly paid employees were unchanged in January at 31.1 hours per week. Overtime hours increased from 1.0 to 1.15 hours in January due to increased overtime for electric power systems in Quebec and Ontario and an increase in manufacturing overtime. Some manufacturers reported scheduling additional overtime and hiring additional employees at the end of January to make up for lost output during the ice storm.

Employers added an estimated 12,400 employees to company payrolls in January. Most provinces recorded employment increases. The largest increase was in Ontario where employers added approximately 23,000 additional paid employees in January. Employers in Quebec reduced payrolls by 26,000 with major layoffs in manufacturing, retail trade, and miscellaneous services. The employment reductions in Quebec were probably temporary due to the ice storm and laid off employees were expected to return to work in February.

Average employment for 1997 was 330,000 above average employment for 1996. This makes 1997 the strongest year for employment growth measured by SEPH since 1989. Employment gains in 1997 were concentrated in industries such as manufacturing,

Note to readers

The Survey of Employment, Payrolls and Hours (SEPH) is currently in the final phase of a major, multi-year re-engineering project to improve estimates of the level of business payrolls and paid employment, and to reduce reporting burden on businesses. With the change in methodology, employment estimates from the administrative records may show a different seasonal pattern than the previous questionnaire data, which can only be assessed within the context of a longer time period. Statistics Canada continues to monitor these impacts and will help users interpret its data. To minimise impacts, it is recommended that SEPH data, particularly employment data, be used in the context of longer time periods or for detailed industry distributions.

The survey reference period for SEPH is the pay period that includes the last seven days of the month. In January, the reference week coincided with the aftermath of the ice storm that shut down many businesses in Quebec and eastern Ontario. Survey response rates for January were slightly lower than usual in Quebec and Ontario and consequently non-response imputation rates were slightly higher than normal. This may lead to higher than usual revisions with the release of the revised January data, scheduled for release on April 29.

wholesale trade and business services where output increased substantially.

Available on CANSIM: matrices 4285-4466, 9438-9452, 9639-9664 and 9899-9911.

Detailed industry data and other labour market indicators will be available in April through standard tables in the monthly publication *Employment, earnings and hours* (72-002-XPB, \$32/\$320), the historical publication *Annual estimates of employment, earnings and hours* 1984-1997 (diskette: 72F0002XDE, \$120) and by custom tabulations.

For further information on this release, contact Jean Leduc (613-951-4090, fax: 613-951-4087; Internet: labour@statcan.ca), Labour Division. □

Average weekly earnings for all employees

Industry group (1980 Standard Industrial Classification)	Jan. 1997	Dec. 1997 ^r	Jan. 1998 ^p	Dec. 1997 to Jan. 1998	Jan. 1997 to Jan. 1998
	seasonally adjusted				
	\$			% change	
Industrial aggregate	596.96	601.06	605.23	0.7	1.4
Logging and forestry	796.88	787.28	784.24	-0.4	-1.6
Mining, quarrying and oil wells	1,064.59	1,085.37	1,091.07	0.5	2.5
Manufacturing	726.81	749.35	754.40	0.7	3.8
Construction	693.74	723.33	721.17	-0.3	4.0
Transportation and storage	713.78	724.39	725.37	0.1	1.6
Communication and other utilities	779.61	791.72	822.85	3.9	5.5
Wholesale trade	635.01	647.77	667.08	3.0	5.1
Retail trade	354.95	355.44	361.80	1.8	1.9
Finance and insurance	778.14	785.52	785.92	0.1	1.0
Real estate operators and insurance agencies	620.19	633.94	644.05	1.6	3.8
Business services	676.04	674.38	675.23	0.1	-0.1
Education-related services	678.86	672.74	673.59	0.1	-0.8
Health and social services	522.38	515.87	515.91	0.0	-1.2
Accommodation, food and beverage services	241.07	232.01	233.06	0.5	-3.3
Public administration	744.96	735.25	736.77	0.2	-1.1
Miscellaneous services	415.46	404.38	407.27	0.7	-2.0
Provinces and territories					
Newfoundland	527.39	520.91	524.50	0.7	-0.5
Prince Edward Island	484.86	474.29	478.53	0.9	-1.3
Nova Scotia	498.44	500.19	501.75	0.3	0.7
New Brunswick	517.78	517.23	517.14	0.0	-0.1
Quebec	560.92	568.17	570.73	0.5	1.7
Ontario	638.45	643.99	649.14	0.8	1.7
Manitoba	522.77	526.80	533.14	1.2	2.0
Saskatchewan	527.32	528.93	537.74	1.7	2.0
Alberta	591.50	605.60	606.42	0.1	2.5
British Columbia	614.18	613.61	616.29	0.4	0.3
Yukon	724.04	704.46	704.10	-0.1	-2.8
Northwest Territories	730.91	741.23	722.07	-2.6	-1.2

^p Preliminary estimates.

^r Revised estimates.

Number of employees

Industry group (1980 Standard Industrial Classification)	Nov. 1997	Dec. 1997 ^r	Jan. 1998 ^p	Nov. 1997 to Dec. 1997	Dec. 1997 to Jan. 1998
	seasonally adjusted				
	'000			% change	
Industrial aggregate	11,449	11,532	11,545	0.7	0.1
Logging and forestry	69	68	67	-1.4	-1.5
Mining, quarrying and oil wells	146	148	148	1.4	0.0
Manufacturing	1,821	1,843	1,844	1.2	0.1
Construction	477	481	484	0.8	0.6
Transportation and storage	475	485	485	2.1	0.0
Communication and other utilities	337	383	382	13.6	-0.3
Wholesale trade	728	737	738	1.2	0.1
Retail trade	1,438	1,437	1,428	-0.1	-0.6
Finance and insurance	514	513	514	-0.2	0.2
Real estate operators and insurances agencies	200	200	202	0.0	1.0
Business services	760	767	776	0.9	1.2
Education-related services	935	936	934	0.1	-0.2
Health and social services	1,212	1,214	1,211	0.2	-0.2
Accommodation, food and beverage services	837	840	839	0.4	-0.1
Public administration	670	670	669	0.0	-0.1
Miscellaneous services	681	682	677	0.1	-0.7
Provinces and territories					
Newfoundland	148	149	149	0.7	0.0
Prince Edward Island	47	47	48	0.0	2.1
Nova Scotia	319	320	322	0.3	0.6
New Brunswick	258	261	264	1.2	1.1
Quebec	2,726	2,756	2,730	1.1	-0.9
Ontario	4,475	4,507	4,530	0.7	0.5
Manitoba	429	432	433	0.7	0.2
Saskatchewan	343	345	345	0.6	0.0
Alberta	1,191	1,202	1,199	0.9	-0.2
British Columbia	1,467	1,477	1,485	0.7	0.5
Yukon	15	15	15	0.0	0.0
Northwest Territories	25	26	25	4.0	-3.8

^p Preliminary estimates.

^r Revised estimates.

Department store sales and stocks

February 1998

Department store sales rose \$24.1 million to \$1,423.5 million (seasonally adjusted) in February, up 1.7% from January. Sales were 11.4% higher in February compared with the \$1,277.9 million in sales the same month a year earlier. Department store sales have been generally increasing since the 1993/94 restructuring, except for pauses in the last half of 1995 and more recently in the last four months of 1997.

In February, the combined provincial sales for Newfoundland and Prince Edward Island (+22.2%) topped all provinces for sales gains from a year earlier

(unadjusted). Provincial sales in Alberta (+18.8%) and Quebec (+17.6%) also posted strong gains. British Columbia, including Yukon and Northwest Territories, despite the net addition of three new stores, trailed all provinces with a year-over-year increase of only 4.5%.

Note: Newfoundland and Prince Edward Island are combined for reasons of confidentiality. February 1998 will be the last month that the following Department stores sales and stocks series will be available on CANSIM: matrices 112 (Series 5: Department store accounts receivable, raw; and Series 6: Department store accounts receivable, S.A.) and 113 (Series

2: Total all department store stocks, Canada, all departments Series 4: Total all department store stocks, Canada, all department. (S.A.).

Department store sales including concessions

	Feb 1997	Feb 1998	Feb 1997 to Feb 1998	Jan 1997 to Feb 1998	Jan-Feb 1997 to Jan-Feb 1998
	\$ millions	\$ millions	% change	\$ millions	% change
Canada	837.2	947.1	13.1	1,869.1	12.7
Newfoundland and Prince Edward Island	14.0	17.1	22.2	33.1	18.7
Nova Scotia	24.2	27.3	12.7	53.4	12.7
New Brunswick	17.1	19.7	15.2	39.2	14.2
Quebec	151.5	178.2	17.6	344.3	12.2
Ontario	352.4	398.1	13.0	786.1	13.0
Manitoba	35.7	38.4	7.5	77.7	10.8
Saskatchewan	27.5	30.4	10.4	61.4	13.9
Alberta	94.4	112.1	18.8	222.4	20.8
British Columbia, Yukon, Northwest Territories	120.4	125.8	4.5	251.4	5.5

Available on CANSIM: matrices 111-113.

For further information on this release, contact Jason Randall (613-951-5668; randjas@statcan.ca) Retail Commodity Section, Distributive Trades Division. ■

Crude oil and natural gas

January 1998

In January, crude oil production rose 3.9% over the same period in 1997, principally the result of an exceptionally strong gain in exports. This was the eighth consecutive monthly year-over-year advance in crude oil production. Exports increased a steep 18.5% from the January 1997 level.

Concurrently, natural gas production increased 2.7% from the January 1997 following two months of modest declines. The production advance was spurred by a 4.3% increase in exports to the United States. Natural gas end-use consumption in the United States is estimated (by the U.S. Energy Information Administration) to be 1.0% higher than in January 1997. Canadian consumption of natural gas declined 2.8% due to much warmer-than-normal temperatures throughout most of the country.

Crude oil and natural gas

	Jan. 1997	Jan. 1998	Jan. 1997 to Jan. 1998
	thousands of cubic metres		% change
Crude oil and equivalent hydrocarbons¹			
Production	10,198.9	10,598.5	3.9
Exports	5,912.2	7,007.9	18.5
Imports ²	3,860.2	3,804.5	-1.4
Refinery receipts	8,474.5	8,146.5	-3.9
	millions of cubic metres		% change
Natural gas³			
Marketable production	14,233.1	14,622.2	2.7
Exports	7,445.7	7,769.5	4.3
Canadian sales ⁴	8,568.8	8,329.0	-2.8

¹ Disposition may differ from production due to inventory change, industry own-use, etc.

² Crude oil received by Canadian refineries from foreign countries for processing. Data differs from International Trade Division estimates due to timing differences and the inclusion in "trade" of crude oil landed in Canada for future re-export.

³ Disposition may differ from production due to inventory change, usage as pipeline fuel, pipeline losses, line-pack fluctuations, etc.

⁴ Includes direct sales.

Available on CANSIM: matrices 530 and 539.

The January 1998 issue of *Crude petroleum and natural gas production* (26-006-XPB, \$19/\$186) will be available in April. See *How to order publications*.

For more detailed information on this release, contact Gérard O'Connor (613-951-3562, Internet: oconger@statcan.ca), Energy Section, Manufacturing, Construction and Energy Division. ■

Stocks of frozen meat products

March 1998

Total frozen meat in cold storage at the opening of the first business day of March amounted to 37,567 tonnes compared with 35,373 tonnes last month and 37,764 tonnes a year ago.

Available on CANSIM: matrices 87 and 9517-9525.

Available free on the Internet at www.statcan.ca. The menu path is Products and services; Downloadable publications; Index of downloadable publications.

For further information on this release, contact Sandra Jarrett (613-951-3847; Internet: jarrsan@statcan.ca), Agriculture Division. ■

Asphalt roofing

February 1998

Production of asphalt shingles totalled 2,886,946 metric bundles in February, a 22.6% decrease from 3,732,006 metric bundles produced a year earlier.

Year-to-date production amounted to 5,401,821 metric bundles, down 27.3% from 7,428,612 metric bundles produced during the same period in 1997.

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

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

For further information on this release, contact Liisa Pent (613-951-3531; Internet: pentlii@statcan.ca), Manufacturing, Construction and Energy Division. ■

Cereals and oilseeds review

January 1998

Data from the January issue of *Cereals and oilseeds review* are now available. The information includes data on production, stocks, cash and futures prices, crop quality, domestic processing, exports, farmers' deliveries and supply-disposition analyses.

The February situation report, which includes an overview of both domestic and international current marketing conditions, is also in the January issue of *Cereals and oilseeds review* (22-007-XPB, \$15/\$149), which will be available in the first week of April. See *How to order publications*.

For further information on this release, contact Rick Burroughs (613-951-2890; Internet: burrlic@statcan.ca) or Les Macartney (613-951-8714), Grain Marketing Unit, Agriculture Division. ■

Average prices of selected farm inputs

February 1998

Preliminary estimates of average prices for selected farm inputs for February 1998 are now available by geographic regions.

Available on CANSIM: matrices 550-582.

For further information on this release, contact Client Services Unit (613-951-9606; fax: 613-951-2848; Internet: infounit@statcan.ca), Prices Division. ■

Completeness of enumeration of the 1996 Census

1996 (preliminary estimates)

Estimates of the completeness of enumeration of the 1996 Census are now available.

Final estimates will be available in September 1998 as part of the population estimates program release, which will be based on the 1996 Census results and coverage studies. For further information, contact Jocelyn Tourigny (613-951-0077), Social Survey Methods Division. ■

A review of procedures for estimating the net undercount of censuses

The Demographic document no. 5 *A review of procedures for estimating the net undercount of censuses in Canada, the United States, Britain and Australia* (91F0015MPE, \$10) is now available on the Internet at www.statcan.ca (91F0015MIE, Free).

For further information on this release, or to order a paper version of this document, contact Carol D'Aoust (613-951-2280), Demography Division. ■

PUBLICATIONS RELEASED

Infomat — A weekly review, March 27, 1998
Catalogue number 11-002-XPE
(Canada: \$4/\$145; outside Canada: US\$4/US\$145).

Mineral wool including fibrous glass insulation,
February 1998
Catalogue number 44-004-XPB
(Canada: \$7/\$62; outside Canada: US\$7/US\$62).

Gas utilities, December 1997
Catalogue number 55-002-XPB
(Canada: \$17/\$165; outside Canada: US\$17/US\$165).

Canada's balance of international payments,
Fourth quarter 1997 (Internet version)
Catalogue number 67-001-XIB
(Canada: \$7; outside Canada: US\$7).

Canada's balance of international payments,
Fourth quarter 1997 (paper version)
Catalogue number 67-001-XPB
(Canada: \$38/\$124; outside Canada: US\$38/US\$124).

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Statistics Canada

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MAJOR RELEASES

- **Urban transit, 1995** 2
Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1995, each Canadian took an average of about 60 trips on some form of urban transit, the lowest level in the past 25 years.
- **Productivity, hourly compensation and unit labour cost, 1996** 4
Growth in productivity among Canadian businesses was noticeably weak again in 1996 accompanied by sluggish gains in employment and slow nominal growth during the year.

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Statistics Canada's official release bulletin

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RELEASE DATES

March 30 to April 3, 1998
(Release dates are subject to change.)

Release date	Title	Reference period
30	National tourism indicators	Fourth quarter 1997
31	Real gross domestic product at factor cost by industry	January 1998
April 3	National accounts balance sheet	1961-1997
