



The Daily

Statistics Canada

Tuesday, May 11, 1999
For release at 8:30 a.m.

MAJOR RELEASES

- **Quarterly Retail Commodity Survey, Annual 1998 and third and fourth quarters 1998**

Consumers spent more in retail stores on motor vehicles and related products in 1998 than they did on food, clothing and footwear combined. Out of every \$100 of retail spending, Canadians purchased \$35.00 worth of motor vehicles and related products, compared with \$19.44 spent on food and \$9.89 on clothing and footwear.

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- **Monthly Survey of Large Retailers, Annual 1998 and February 1999**

In 1998, a group of about 80 large retailers gained ground on the rest of the retail stores in terms of their share of the retail trade market.

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- Annual Survey of Manufacturers, 1997

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MAJOR RELEASES

Quarterly Retail Commodity Survey

Annual 1998 and third and fourth quarters 1998

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The fourth largest category was home furnishings and electronics, which took \$7.31 of every \$100 spent by consumers. Purchases of prescription and over-the-counter drugs took \$3.99, slightly outpacing the \$3.83 spent on sporting and leisure goods. Consumers spent \$3.22 out of every \$100 on alcoholic beverages, compared with \$2.37 on tobacco products and supplies.

Note to readers

The Quarterly Retail Commodity Survey provides quarterly estimates, at the national level, of the goods and services sold at various types of retail stores. It works in conjunction with the Monthly Retail Trade Survey that provides total sales estimates by type of retail store.

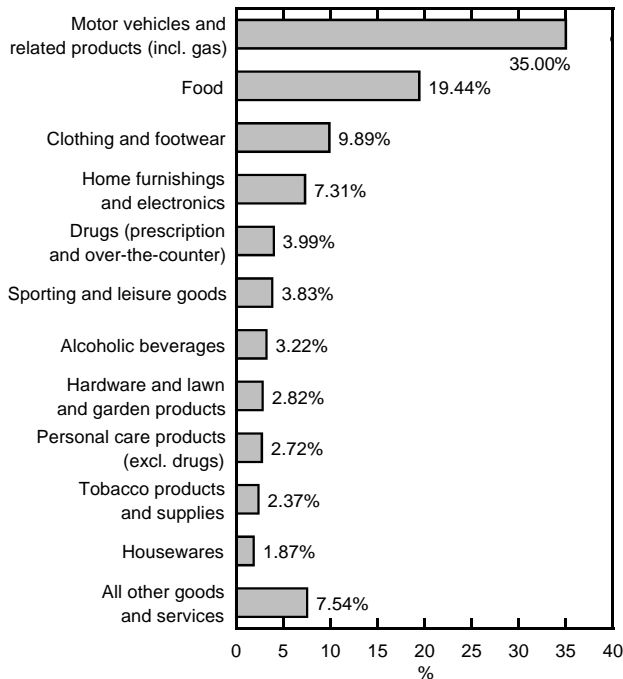
Released today are revised 1997 annual estimates along with revised first and second quarter 1998 and preliminary third and fourth quarter 1998.

Quarterly data for the Quarterly Retail Commodity Survey have not been adjusted for seasonality.

and related products, and \$59.3 billion on food and beverages.

Of the auto-related sales, about 42% went to new motor vehicles — cars, trucks, minivans or sport utility vehicles, including leased vehicles at their full selling price, not at the monthly lease rate. Another 18% was spent on used motor vehicles, 18% on gas and oil, 13% on parts, and 10% on service.

Retail sales by commodity, 1998



Market share: Where consumers buy their goods

Data provided by the Quarterly Retail Commodity Survey allow analysis of the market shares of various types of retail stores with respect to certain commodities. The data show the type of retail outlets where consumers prefer to buy these commodities, and shifts in consumer preferences.

For example, Canadians spent \$16.6 billion on health and personal care products in 1998. These include cosmetics, drugs (prescription and over-the-counter), vitamins, eyewear, and other toiletries. Although drug stores captured the majority of the market for these products (61.8%), consumers decided to buy \$6.3 billion worth of these products at other types of retail stores. Food stores managed to capture \$2.6 billion (15.8%) of the market, while general merchandise stores grabbed another \$2.4 billion (14.6%).

Sales of tobacco products and supplies totalled \$5.8 billion in 1998. Although the majority (61.1%) was bought at food stores (includes supermarkets as well as convenience stores), drug stores laid claim to \$387.5 million (6.6%) of the tobacco market. The remainder was purchased mainly at general merchandise stores, gas stations and duty-free outlets.

Drug stores, in fact, sell a widely diversified selection of products. In 1998, consumers

In total, spending in retail stores reached \$246.8 billion in 1998, up 3.6% from 1997. Consumers spent about \$86.4 billion on motor vehicles

bought \$855 million of food and beverages at their local drug store, mostly in the form of candy and snacks (\$493 million). They also bought \$353 million of home furnishings and electronics (still cameras and related products for example); \$329 million of housewares, mostly household cleaning supplies; \$125 million of newspapers, magazines and books; \$30 million of women's hosiery and \$22 million of jewellery and leather goods.

Quarterly results: Consumer shopping preferences shifted slightly at Christmas

Analysis of the market share of certain retail outlets from one quarter to another shows shifts in consumer shopping patterns.

In the fourth quarter of 1998, Canadians bought the majority (55.2%) of their home furnishings and electronics from a specialty store. However, department stores gained ground during the holiday period for these items, accounting for 20.3% of their sales, up from 16.7% in the third quarter of 1998. Other general merchandise stores, in combination with home and auto supply stores, also made gains. Their market share for home furnishings and electronics rose from 11.8% in the third quarter to 14.1% in the fourth.

During the Christmas season, department stores also grabbed a bigger slice of the pie for clothing and

footwear. In the fourth quarter of 1998, consumers bought 26.9% of their clothing and footwear at a department store, compared with 24.4% in the previous quarter. Specialty stores still accounted for the majority of the clothing and footwear market in the fourth quarter (50.8%).

The gain for department stores in sales of men's clothing was bigger than that for women's clothing. The department stores' share of the men's clothing market increased from 25.6% to 29.3% (up 3.7 percentage points) between the third and fourth quarter of 1998 while their share of the women's clothing market rose from 22.5% to 25.2% (up 2.7 percentage points).

In total, consumers spent \$66.7 billion in retail stores during the last three months of 1998. (Quarterly data have not been adjusted for seasonality.)

For more data, contact the Client Services Unit (613-951-3549; 1-877-421-3067; retailinfo@statcan.ca), Distributive Trades Division. For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Leslie Kiss (613-951-3556), Retail Commodity Section, Distributive Trades Division. □

Commodity share of sales within store types

1998

	Food stores	Drug stores	Clothing and shoe stores	Household furniture, appliance and household furnishing stores	General merchandise and automotive parts, accessories and service stores	Other retail stores	All retail stores
%							
Commodities							
Food and beverages	80.1	6.6	0.3	0.0	10.7	7.1	24.0
Health and personal care products	4.5	79.1	1.1	0.0	5.6	1.1	6.7
Clothing, footwear and accessories	0.3	0.5	92.5	0.1	18.5	3.1	9.9
Home furnishings and electronics	0.4	2.7	1.1	84.7	13.0	1.0	7.3
Motor vehicles, parts and service	0.0	0.0	0.0	0.7	25.3	56.3	28.8
Automotive fuels, oils and additives	1.6	0.0	0.0	0.0	1.4	12.8	6.2
All other goods and services	13.0	11.0	5.0	14.5	25.5	18.5	17.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Commodity share of sales across store types

1998

	Food stores	Drug stores	Clothing and shoe stores	Household furniture, appliance and household furnishing stores	General merchandise and automotive parts, accessories and service stores	Other retail stores	All retail stores
%							
Commodities							
Food and beverages	78.0	1.4	0.1	0.0	7.8	12.7	100.0
Health and personal care	15.8	61.8	0.9	0.0	14.6	6.9	100.0
Clothing, footwear and accessories	0.7	0.3	52.7	0.0	32.6	13.7	100.0
Home furnishings and electronics	1.3	2.0	0.8	58.9	30.9	6.1	100.0
Motor vehicles, parts and service	0.0	0.0	0.0	0.1	15.3	84.6	100.0
Automotive fuels, oils and additives	6.1	0.0	0.0	0.0	3.9	90.0	100.0
All other goods and services	17.7	3.4	1.6	4.3	26.0	46.9	100.0
Total	23.4	5.2	5.6	5.1	17.4	43.3	100.0

Monthly Survey of Large Retailers

Annual 1998 and February 1999 (preliminary)

In 1998, a group of about 80 large retailers gained ground on the rest of the retail stores in terms of their share of the retail trade market.

Sales for the group of large retailers reached \$68.0 billion in 1998, an 8.0% increase over the previous year. In comparison, sales for the remaining retailers, excluding motor and recreational vehicle dealers, were relatively flat.

As a result, the group of large retailers accounted for about 35% of total retail trade excluding motor and recreational vehicle dealers in 1998, up from about 33% the year before.

On a monthly basis, the group of large retailers registered a 6.0% increase in sales in February compared with the same month in 1998. (All data in this report are unadjusted for seasonality.)

Large retailers popular for housewares and clothing

For every dollar Canadians spent on housewares in 1998, 68 cents went into the cash registers of one of the large retailers covered in this survey. (Housewares include such items as cookware, tableware, household cleaning supplies, food wraps, brooms, etc.) The large retailers also received 57 cents of every dollar spent on clothing, footwear and accessories, and 51 cents of every dollar spent on home furnishings and electronics.

Additionally, consumers bought 41% of their food and beverages, 37% of their hardware and lawn and garden supplies, and 34% of their sporting and leisure goods at one of the large retailers.

Almost 30% of all health and personal care products sold in 1998 were purchased at a member of the large retailer group, whereas 12% of all remaining goods and services came from one of the large retailers.

Note to readers

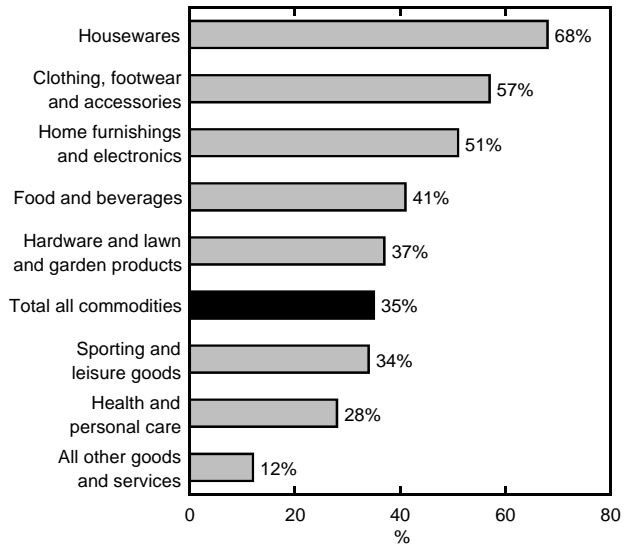
The Monthly Survey of Large Retailers provides a breakdown of sales on the basis of commodities at the national level for a group of about 80 large retailers who were included in the survey based on their sales and retail sector.

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.

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.

When making the comparison to all the products sold in retail trade, commodities sold by motor and recreational dealers have been removed.

Market share of the large retailers in 1998



Three product lines accounted for majority of sales

Taken together, three product lines represented 70% of all items sold within the group of large retailers: food and beverages; clothing, footwear and accessories; and home furnishings and electronics.

The importance of these product lines within the group of large retailers can be explained by the composition of the group. The group of large retailers is comprised of approximately 80 retail companies belonging to major retailers in the food, clothing, home

furnishings, sporting goods and general merchandise sectors of retail trade. A full list of who is included in the survey is available upon request.

Commodity shares within the group of large retailers

	1997 ^r	1998 ^r
	%	
Commodities		
Food and beverages	36.4	35.8
Clothing, footwear and accessories	20.4	20.5
Home furnishings and electronics	13.5	13.5
Health and personal care products	6.6	6.9
Sporting and leisure goods	4.8	4.8
Housewares	4.4	4.6
Hardware and lawn and garden products	3.7	3.8
All other goods and services	10.2	10.0
Total	100.0	100.0

^r Revised data.

Sales of food and beverage products among the group of large retailers reached \$24.4 billion in 1998, up 6.2% from 1997. Since this was less than the 8.0% increase for all goods and services offered by the group, the food and beverage share of the total fell slightly from 36.4% in 1997 to 35.8% in 1998.

Sales of clothing, footwear and accessories, the second largest product line carried by the group of large retailers, increased 8.5% to \$13.9 billion in 1998. This product line accounted for 20.5% of all items sold by the group, relatively unchanged in share from 1997.

Sales of home furnishings and electronics, the third largest product line, rose 8.2% to \$9.2 billion in 1998 and remained at a 13.5% share of all items sold by the group of large retailers.

The biggest winners within the group of large retailers, in terms of year-over-year percentage sales increases, were health and personal care products (+13.8%), housewares (+12.4%) and hardware and lawn and garden products (+12.0%).

Sales by commodity for the group of large retailers

	1997 ^r	1998 ^r	1997 to 1998
	\$ 000,000		% change
Commodities			
Food and beverages	22,934	24,357	6.2
Clothing, footwear and accessories	12,848	13,944	8.5
Home furnishings and electronics	8,507	9,202	8.2
Health and personal care products	4,128	4,697	13.8
Sporting and leisure goods	3,000	3,243	8.1
Housewares	2,778	3,122	12.4
Hardware and lawn and garden products	2,302	2,579	12.0
All other goods and services	6,447	6,810	5.6
Total	62,944	67,954	8.0

^r Revised data.

February sales: strong year-over-year increase

According to preliminary data, sales within the group of large retailers in February reached \$4.5 billion, up 6.0% or \$254 million compared with February 1998. In contrast, sales for total retail trade, excluding motor and recreational vehicle dealers, increased 2.5%.

Sales by commodity for the group of large retailers

	Feb. 1998 ^r	Feb. 1999 ^p	Feb. 1998 to Feb. 1999
	unadjusted		
	\$ 000,000		% change
Commodities			
Food and beverages	1,755	1,837	4.7
Clothing, footwear and accessories	719	767	6.7
Home furnishings and electronics	560	599	7.0
Health and personal care products	316	378	19.6
Housewares	198	216	9.6
Sporting and leisure goods	163	164	0.6
Hardware and lawn and garden products	115	120	4.3
All other goods and services	438	437	-0.2
Total	4,264	4,518	6.0

^r Revised data.

^p Preliminary data.

The health and personal care products category was the top performer in February, with a year-over-year increase of 19.6%. Houseware products also had a notable year-over-year increase in sales (+9.6%).

For more data, contact the Client Services Unit (613-951-3549; 1-877-421-3067 or

retailinfo@statcan.ca), Distributive Trades Division. For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Veronica Utovac (613-951-0669), Retail Commodity Section, Distributive Trades Division. ■

OTHER RELEASES

For-hire motor carriers of freight - all carriers

Fourth quarter 1998

The fourth quarter 1998 operating ratio (operating expenses divided by operating revenues) for for-hire motor carriers of freight was unchanged from the fourth quarter of 1997 at 0.93. Any ratio under 1.00 represents an operating profit.

In the fourth quarter of 1998, there was an estimated 2,343 motor carriers of freight domiciled in Canada (with annual revenues of \$1 million or more). The fourth quarter showed an 8% increase in the number of carriers over the same period in 1997 with total operating revenues for these carriers increasing 4% to \$3.9 billion. Both average operating revenue and expenses per carrier fell approximately 3% to \$1.7 million and \$1.5 million respectively over the fourth quarter of 1997.

A more complete analysis of the fourth quarter of 1998 data will appear in the *Surface and marine transport: service bulletin* (50-002-XIB, \$10/\$62), which will be available shortly. See *How to order publications*.

Available on CANSIM: matrix 144.

For more information or to enquire about the concepts, methods and data quality of this release, contact Gilles Paré (613-951-2517; fax: 613-951-0579; paregil@statcan.ca), Transportation Division. ■

Annual Survey of Manufacturers 1997

The Annual Survey of Manufacturers provides information on over 200 different industries. Principal

statistics for each industry are released on CANSIM as they become available. Data for the industries listed in the following table are now available. To date, data for 188 industries have been released.

The industries listed in the table appear in *Manufacturing industries of Canada, national and provincial areas* (31-203-XPB, \$68) and *Products shipped by Canadian manufacturers* (31-211-XPB, \$67). See *How to order publications*. In addition, a CD-ROM on *Products shipped by Canadian manufacturers 1988-1996* (31-211-XCB, \$430 for single use) is available from the Manufacturing Dissemination Unit at 613-951-9497.

Eight new articles providing data and analysis on manufacturing industries ranging from plastics to the clothing industry are now available on Statistics Canada's Web site (www.statcan.ca). These articles incorporate survey results from the 1996 Annual Survey of Manufacturers, the 1998 Monthly Survey of Manufacturing and other Statistics Canada and industry sources. Also covered are rubber products industries, textiles, electrical and electronic products, fabricated metal products, and chemical and chemical products.

Articles for specific industries can be found on www.statcan.ca under *Downloadable publications (free)*. General articles on manufacturing are located under *Research papers*.

For more information about the articles, contact the Disclosure and Dissemination Unit, (613-951-9497; manufact@statcan.ca), Manufacturing, Construction and Energy Division.

For more information on data from the survey, or to enquire about the concepts, methods, and data quality for this release, see contact name listed in the following table (fax: 613-951-9499; desrosi@statcan.ca). □

Value of shipments

	1996	1997	1996 to 1997	Matrix	Contact
	\$ millions		% change		
Industry (Standard Industry Classification)					
Malt (1094)	386.7	325.5	-15.8	5371	P. Zylstra 613-951-3511
Canvas and related products (1931)	192.3	222.7	15.8	5432	Y. Sheikh 613-951-2518
Fur Goods (2495)	98.5	93.9	-4.7	5455	Y. Sheikh 613-951-2518
Wooden door and window (2543)	1,072.2	1,136.3	6.0	5465	G. Simard 613-951-3516
Other paper (2719)	4,227.1	4,105.5	-2.9	5487	G. Simard 613-951-3516
Folding carton and set-up box (2731)	1,313.1	1,278.8	-2.6	5489	G. Simard 613-951-3516
Paper bag (2733)	241.0	265.1	10.0	5491	G. Simard 613-951-3516
Other converted paper (2799)	960.5	947.5	-1.4	5495	G. Simard 613-951-3516
Other stamped and pressed metal products (3049)	2,654.3	2,826.8	6.5	5526	É. Saint-Pierre 613-951-9837
Other machinery and equipment, not elsewhere classified (3199)	6,036.4	6,452.5	6.9	5547	R. Kowaluk 613-951-0600
Mobile home (3244)	256.9	251.2	-2.2	5554	A. Shinnan 613-951-3515
Motor vehicle wheel and brake (3255)	1,422.1	1,680.2	18.2	5559	A. Shinnan 613-951-3515
Telecommunication equipment (3351)	5,042.5	6,460.5	28.1	5574	R. Kowaluk 613-951-0600
Other concrete products (3549)	458.1	541.5	18.2	6854	É. Saint-Pierre 613-951-9837
Indicating, recording and controlling instruments (3911)	1,307.5	1,307.3	0.0	6884	R. Kowaluk 613-951-0600

PUBLICATIONS RELEASED

Cement, March 1999
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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, 1995** 4
Growth in productivity among Canadian businesses was noticeably weak again in 1995, accompanied by sluggish gains in employment and slow momentum growth during the year.

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