



# The Daily

Statistics Canada

**Tuesday, August 24, 1999**

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## MAJOR RELEASES

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- **Movie theatres and drive-ins, 1997-98** 2  
Attendance at movie theatres and drive-ins continued to climb for the sixth consecutive year, reaching a 17-year high of almost 100 million in 1997-98. Profits were also up and these gains went hand-in-hand with the recent opening of 23 new multi-screen complexes.

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## MAJOR RELEASES

### Movie theatres and drive-ins

1997-98

Attendance at movie theatres and drive-ins continued to climb for the sixth consecutive year, reaching a 17-year high of almost 100 million in 1997-98. Profits were also up and these gains went hand-in-hand with the recent opening of 23 new multi-screen complexes.

After having grown at an annual average rate of about 4% in the previous five years, attendance by moviegoers grew 8% in 1997-98. Attendance at recently opened large and very large theatres contributed significantly to this overall increase. The attraction to larger theatres can also be seen in the already existing establishments, in which larger theatres reported a 6% attendance increase while attendance declined at both small (-10%) and medium-sized (-23%) theatres. (This release ranks theatres in size according to revenue, with small theatres having revenue less than \$500,000 and very large ones over \$5,000,000.)

Film exhibition industry profits were \$85.8 million in 1997-98, up 31% from the preceding year. Full-time employment was down about 2% to 1,376 while the number of part-time employees increased 11% to 9,895.

#### Summary data for movie and drive-in theatres

1997-98

|                          | Movie theatres | Drive-ins | Total   |
|--------------------------|----------------|-----------|---------|
| Number of theatres       | 617            | 71        | 688     |
| Number of screens        | 2,186          | 115       | 2,301   |
| Full-time employees      | 1,274          | 102       | 1,376   |
| Part-time employees      | 9,168          | 727       | 9,895   |
| 000's                    |                |           |         |
| Attendance               | 97,686         | 2,209     | 99,895  |
| Box office receipts (\$) | 490,123        | 12,535    | 502,658 |
| Total revenues (\$)      | 699,879        | 20,875    | 720,754 |
| Profit (\$)              | 82,984         | 2,840     | 85,824  |

Alberta residents were Canada's most avid moviegoers. On average, they went to the movies 4.6 times in 1997-98, up 13% from the previous year. Most of this increase came from attendance at five recently opened large and very large multi-screen theatres. The highest increases in total attendance occurred in New Brunswick (+26%) and Saskatchewan (+27). Large multi-screen theatres recently opened in both provinces.

#### Note to readers

The Motion Picture Theatres Survey is a census of all movie theatres and drive-in theatres in Canada. The 1997-98 survey included 617 movie theatres and 71 drive-ins that provided data for the fiscal year between April 1, 1997 and March 31, 1998. Percentage comparisons between 1996-97 and 1997-98 are based on the exclusion of 14 theatres that were added to the survey frame in 1997-98 but were also known to be in operation in 1996-97. Most of these theatres were small and were scattered in various provinces. The theatres excluded from the percentage comparisons represented about 1% of total revenues in 1997-98.

Theatres have been grouped by total operating revenue. Small theatres are those reporting total operating revenue of less than \$500,000, medium-sized theatres had revenues from \$500,000 to \$999,999, large theatres had revenues from \$1,000,000 to \$5,000,000, and very large theatres reported revenues over \$5,000,000. The large and very large sizes are sometimes grouped together and referred to as larger theatres. The recently opened theatres mentioned in this release included those that were opened in 1997-98, as well as those which opened for only part of 1996-97.

There are two principal sources of revenues available to a theatre - the box office and the snack bar. Although survey results do not provide separate labour costs associated with each of these sources, information on certain direct expenses allows the calculation of gross profit which is used in this release. To calculate these values, distribution costs are subtracted from ticket revenues and the cost of goods sold is subtracted from snack bar receipts.

#### Annual average attendance per person at movie theatres and drive-ins

1997-98

|                                 | Number of visits |
|---------------------------------|------------------|
| <b>Canada</b>                   | <b>3.33</b>      |
| Newfoundland                    | 1.58             |
| Prince Edward Island            | 3.34             |
| Nova Scotia                     | 2.73             |
| New Brunswick                   | 2.21             |
| Quebec                          | 3.21             |
| Ontario                         | 3.24             |
| Manitoba                        | 3.01             |
| Saskatchewan                    | 2.30             |
| Alberta                         | 4.61             |
| British Columbia                | 3.85             |
| Yukon and Northwest Territories | 3.12             |

#### Admissions hit a 36-year high at movie theatres

The recent resurgence in popularity of movie theatres (excluding drive-ins) resulted in a 36-year high of 97.7 million admissions in 1997-98, up 8% from

the previous year and the sixth consecutive annual increase. Gains in attendance were accompanied by rationalization and restructuring within the industry. Many small- and medium-sized cinemas have been replaced by larger multiple-screen houses. Over the preceding three years, the number of small and medium theatres fell by 52, while the number of large and very large theatres grew by 29. Overall, this resulted in a 10% increase in the number of seats.

Although much of the attendance growth coincided with the recently opened large and very large multi-screen houses, the draw of these new theatres may have also created hardships for previously existing small- and medium-sized cinemas. Attendance at these theatres was down 11% and 24%, respectively.

Very large theatres have also increased their market share. Over the last three years, while the number of very large movie theatres doubled from 5 to 10, their share of attendance also doubled from 4% to 8%. Large theatres also gained in their share of attendance, while the shares of small- and medium-sized movie theatres declined.

#### Market share of attendance by size of theatre 1994-95 and 1997-98

|                     | 1994-95    | 1997-98    |
|---------------------|------------|------------|
|                     | %          |            |
| <b>All theatres</b> | <b>100</b> | <b>100</b> |
| Small theatres      | 12         | 8          |
| Medium theatres     | 15         | 9          |
| Large theatres      | 69         | 75         |
| Very large theatres | 4          | 8          |

The overall increase in attendance in 1997-98 was accompanied by an increase in employment. Although full-time employment at movie theatres remained almost unchanged at 1,274, the number of part-time employees increased 13% to 9,168. Wages rose 6% to \$106 million.

#### Jump in profits for movie theatres

Movie theatres had a profitable year in 1997-98. Profits were up 32% to \$83.0 million with nearly two-fifths of the increase attributable to recently opened larger theatres. Overall, larger theatres accounted for 94% (\$77.9 million) of all profits, while small theatres reported a loss of nearly \$1 million; medium-sized theatres had profits of \$6 million.

Examining the data on a per-admission basis shows how structural changes in the market affected the financial picture of different-sized movie theatres. As theatre size increased, profitability also increased. Very large theatres not only retained more of each

ticket sold but they also made considerably more profit on each patron in the snack bar and auxiliary services. The recent trend of party rooms for kids, coffee bars, swank cocktail lounges, high-tech video arcades and a slew of concession stands with products ranging from pizza to gourmet cookies also appeared to contribute significantly to the bottom line.

Another reason for the industry's restructuring may be that larger theatres appear to be more cost efficient. They cut down their per-admission costs by using theatres more intensively than smaller operators, possibly because they have greater flexibility to shift a film to a different-sized hall as its popularity changes. In the very large movie theatres, for example, an average of 30% of the seats were filled compared with 20% in small theatres. The per-admission cost for staff in very large theatres was one-third less than in small theatres.

Although the survey results do not provide balance-sheet information to fully analyse the financial health of movie theatres, the data show that in 1997-98 very large theatres earned an average 22% profit on revenues, compared with 12% for large, 10% for medium-sized and an average loss of 2% for small theatres.

#### Financial statistics of movie theatres per admission 1997-98

|   | Small<br>theatres | Medium<br>theatres | Large<br>theatres | Very<br>large<br>theatres | All<br>theatres |
|---|-------------------|--------------------|-------------------|---------------------------|-----------------|
|   | \$                |                    |                   |                           |                 |
| Gross box office profit                   | 2.60              | 2.55               | 2.64              | 2.81                      | 2.65            |
| Gross snack bar profit                    | 1.32              | 1.52               | 1.52              | 2.05                      | 1.55            |
| Wages, salaries and<br>benefits           | 1.62              | 1.22               | 1.01              | 1.08                      | 1.09            |
| Total operating profit                    | -0.11             | 0.67               | 0.87              | 1.89                      | 0.85            |
|   | %                 |                    |                   |                           |                 |
| Profit margin (profit<br>as % of revenue) | -2                | 10                 | 12                | 22                        | 12              |
| Average capacity<br>utilization           | 20                | 17                 | 23                | 30                        | 21              |

#### Drive-in theatres: numbers grew but attendance fell

The trend of disappearing drive-in theatres ended in 1997-98, when the number of drive-ins grew 3% to 71. Despite this increase, however, admissions continued to drop, reaching 2.2 million in 1997-98 (-5%) to mark the third consecutive decline.

Despite a drop in attendance, profits at drive-in theatres increased 13% to \$2.8 million.

Costs fell 3%, primarily as a result of staff reductions. Full-time staff declined 23% to 102, while part-time employees dropped 7% to 727. As a result, employment costs fell 9% to \$4.2 million.

As with regular movie theatres, larger drive-ins fared better than their smaller counterparts. Attendance was up 4% from the previous year as were their gross profits from the box office (+4%) and candy bar concessions (+1%). Furthermore, large drive-ins reported a 14% decrease in employment costs. The result was a 48% increase in profits for large drive-ins. Profits at small drive-ins were up 23% while they were down 3% at medium-sized venues.

Selected data from the *Motion Picture Theatres Survey* are available in table format (87F0009XPE, \$50). Data from this survey are also available by province and for the territories. Special tabulations are available on a cost-recovery basis.

For more information, or to enquire about the concepts, methods and data quality of this release, contact Norman Verma (613-951-6863; fax: 613-951-9040; [vermnor@statcan.ca](mailto:vermnor@statcan.ca)), Culture Statistics Program, Culture, Tourism and the Centre for Education Statistics. ■

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## OTHER RELEASES

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### Union statistics

First half 1999

Union membership on average remained stable during the first half of 1999 compared with the same period last year. However, the rate of union membership across the country declined marginally because of an increase in the number of paid workers.

According to data from the Labour Force Survey, about 3.6 million paid workers belonged to a union during the first half of 1999, unchanged from the first six months of 1998.

However, at the same time, average paid employment rose about 292,000 to 11.9 million. As a result, the rate of union membership declined marginally from 30.7% to 30.1%. Rates were down for both sexes, from 31.6% to 30.9% for men, and from 29.8% to 29.3% for women.

The rate of unionization in the public sector remained virtually unchanged at about 71%. Almost all of the decline in unionization rates occurred in the private sector, where the rate fell from 19.1% to 18.2%. Rates fell in half of the 16 major industry groups, most notably in the manufacturing, transportation and warehousing, and accommodation and food industries. The biggest increase occurred in utilities, with more moderate increases in construction, trade, and finance, insurance, real estate and leasing.

Among 10 major occupational groups, union membership rates rose in only three: social and public service; culture and recreation; and sales and service.

Rates declined in five provinces — Quebec, Ontario, British Columbia, Newfoundland and New Brunswick. They remained unchanged in Saskatchewan and were up in the rest. Newfoundland was the most unionized province, with 38.0% of all paid employees being union members. Alberta had the lowest rate at 23.0%.

During the first half of 1999, an average of 295,000 non-unionized employees were covered by collective agreements, unchanged from the same period a year earlier.

For 1998 as a whole, average hourly earnings of unionized workers were higher than those of non-unionized workers for both full-time (\$19.06 an hour compared with \$15.57) and part-time (\$16.80 compared with \$9.81) workers.

However, not all of this difference was a reflection of unionization. Industry, occupation and educational attainment, among many other factors, also determine

wage rates. These should be considered when interpreting the relative wages of unionized and non-unionized workers.

On average, full-time female unionized workers earned 90% of the hourly wages of their male counterparts. In contrast, unionized females who worked part-time earned 8% more than their male counterparts.

In 1998, 71.3% of employees in the public sector belonged to a union, more than three times the 19.1% among their private sector counterparts. The rate of unionization among women in the public sector (72.5%) was slightly higher than that of men (69.7%), reflecting the presence of women in public administration and in teaching and health care positions.

Data from Human Resources Development Canada show that the rate of wage increases in contract settlements surpassed the inflation rate in 1998 (1.6% compared with 1.0%). As of April 1999, the results were similar (1.7% compared with 1.0%).

Major wage gains in the public sector during the first four months of 1999 averaged 1.5% compared with 2.3% in the private sector. During the first quarter of 1999, the proportion of working time lost due to strikes and lockouts rose marginally to 0.09% from 0.08% in 1998.

This release, timed to coincide with Labour Day, is based on an article titled "Unionization - an update" scheduled for publication Sept. 1 in the Autumn 1999 issue of *Perspectives on labour and income* (75-001-XPE, \$18/\$58). This article is available immediately by fax or as a PDF file on the Statistics Canada web site [www.statcan.ca](http://www.statcan.ca).

The first detailed socio-demographic and economic profile of union members, using data from the Labour Force Survey, was released before Labour Day on Aug. 28, 1997 and updated on Sept. 3, 1998. This year's update extends the profile to the provincial level. It also provides unionization rates according to the new North American Industry Classification System and the 1991 Standard Occupational Classification. In addition, the article provides data on earnings, wage settlements, inflation, and strikes and lockouts.

For more information, or to enquire about the concepts, methods and data quality of this release, contact Ernest B. Akyeampong (613-951-4624; [akyeem@statcan.ca](mailto:akyeem@statcan.ca)), or Fiona Long (613-951-4628; [longfio@statcan.ca](mailto:longfio@statcan.ca)), Labour and Household Surveys Analysis Division. ■

## Crushing statistics

July 1999

Canadian oilseed processors crushed 183 625 metric tonnes of canola in July according to the monthly survey of crushing plants. Oil production totalled 77 278 tonnes while meal production amounted to 117 883 tonnes.

In the 1998-99 crop year, the canola crush volume was 3 062 474 tonnes, a 5.4% decline from the record crush quantity of 3 238 816 tonnes in the 1997-98 crop year.

**Available on CANSIM: matrix 5687.**

The July 1999 issue of *Cereals and oilseeds review* (22-007-XPB, \$15/\$149) will be released in early October. See *How to order publications*.

For more information, or to enquire about the concepts, methods and data quality of this release, contact Karen Gray (204-983-2856; [karen.gray@statcan.ca](mailto:karen.gray@statcan.ca)) or Les Macartney (613-951-8714; [les.macartney@statcan.ca](mailto:les.macartney@statcan.ca)), Grain Marketing Unit, Agriculture Division. ■

## Economic overview of farm incomes, dairy farms

1996

The fourth bulletin in the series *Economic overview of farm incomes*, a joint publication of Statistics Canada and Agriculture and Agri-Food Canada, is now available.

*Economic overview of farm incomes* offers farm financial information and analysis based on data from the Taxation Data Program and other agricultural surveys. The fourth bulletin provides a detailed analysis of dairy farms, including information on farm level revenues, expenses and net operating income before depreciation by revenue class and by province. Information on the concentration and specialization of production, as well as on the physical characteristics of dairy farms, is also included.

*Economic overview of farm incomes, dairy farms* (21-005-XIE, vol. 1, no. 4, free) is now available on the Statistics Canada Web site at [www.statcan.ca](http://www.statcan.ca), under *Products and services* then *Downloadable publications (free)*.

For more information, or to enquire about the concepts, methods, and data quality of this release, contact Lina Di Piéto (613-951-3171 or 1 800 465-1991; fax: 613-951-3868) or Alain Bertrand (613-951-5027), Agriculture Division. ■

## PUBLICATIONS RELEASED

**Economic overview of farm incomes**, August 1999,  
vol. 1, no. 4  
**Catalogue number 21-005-XIE**  
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| Thursday, June 3, 1997<br>For release at 9:30 a.m.   |    |
| <b>MAJOR RELEASES</b>  |    |
| • <b>Urban transit, 1995</b><br>Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1995, each Canadian took an average of about 4.5 trips on some form of urban transit, the lowest level in the past 25 years.              | 2  |
| • <b>Productivity, hourly compensation and unit labour cost, 1995</b><br>Growth in productivity among Canadian businesses was noticeably weak again in 1995, accompanied by sluggish gains in employment and slow increases in unit labour cost during the year. | 4  |
| <b>OTHER RELEASES</b>  |    |
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| • <b>Steel primary forms, year ending May 31, 1997</b>   | 12 |
| • <b>Egg production, April 1997</b>  | 12 |
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Editor: Dan Smythe (613-951-1103, [smytdan@statcan.ca](mailto:smytdan@statcan.ca))

Head of Official Release: Chantal Prévost (613-951-1088), [prevcha@statcan.ca](mailto:prevcha@statcan.ca)

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