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MAJOR RELEASES

- **Movie theatres and drive-ins, 1998/99** 2
 Moviegoers flocked to the silver screen in droves in 1998/99, attracted by new multi-screen theatres with stadium seating, video games and party rooms. Overall attendance increased for the seventh year in a row, hitting a 38-year high of 112.8 million, up 12% from 1997/98.
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OTHER RELEASES

New release date for Travel between Canada and other countries, August 2000	4
Quarterly Retail Commodity Survey, second quarter 2000	4
Railway carloadings, seven-day period ending August 31, 2000	6
Industrial monitor on CD-ROM, October 2000	6

NEW PRODUCTS 8

REGIONAL REFERENCE CENTRES 9



MAJOR RELEASES

Movie theatres and drive-ins

1998/99

Moviegoers flocked to the silver screen in droves in the fiscal year 1998/99, attracted by new multi-screen theatres with stadium seating, video games and party rooms.

Overall attendance increased for the seventh year in a row, hitting a 38-year high of 112.8 million. This was a 12% increase from 1997/98, twice the average annual growth rate of about 6% during the previous six fiscal years.

Attendance increased substantially at movie theatres, owing largely to new, multi-screen complexes featuring digital sound, video-game arcades and large, comfortable refreshment areas. Twenty-eight of these multi-screen theatres opened in 1998/99 alone.

However, at drive-ins, attendance was down for the fourth straight year. There were only 68 drive-in theatres in Canada in 1998/99, 11% fewer than in 1997/98.

But despite the growth in attendance, profits for the industry as a whole declined 13% from 1997/98 to \$75.7 million. Full-time employment rose 19% to 1,687, and part-time employment increased 15% to 11,509.

Summary data for movie and drive-in theatres

1998/99

	Movie theatres	Drive-ins	Total
Number of theatres	624	68	692
Number of screens	2,468	106	2,574
Full-time employees	1,586	101	1,687
Part-time employees	10,850	659	11,509
	'000		
Attendance	110,890	1,903	112,793
Box office receipts (\$)	581,074	11,094	592,168
Total revenues (\$)	837,910	19,101	857,011
Profit (\$)	73,580	2,110	75,690

Continuing past trends, residents of Alberta and British Columbia remained Canada's most avid moviegoers. On average, each Albertan went to the movies almost five times in 1998/99, well above the national average of 3.73 outings a year. British Columbians averaged about four trips each. At less than half the national average, Newfoundlanders continued to have the lowest average attendance per person.

Note to readers

The Motion Picture Theatres Survey is a census of all movie theatres and drive-in theatres in Canada. The 1998/99 survey included 624 movie theatres and 68 drive-ins that provided data for the fiscal year between April 1, 1998 and March 31, 1999. Percentage comparisons between 1997/98 and 1998/99 were done excluding 31 theatres that were added to the survey frame in 1998/99 but were also known to be in operation in 1997/98. Most of these theatres were small and were scattered in various provinces. The theatres excluded from the percentage comparisons represented 1.6 % of total revenues and 1.9% of total attendance in 1998/99.

However, when comparing between 1991/92 and 1998/99, no attempt was made to correct for survey frame differences from year to year. Comparisons are based on total reported data for each year. This may have a slight impact on comparisons over this period.

Theatres, both indoor and drive-in, have been grouped by total operating revenue. Small theatres are those reporting total operating revenue of less than \$500,000, medium theatres had revenues from \$500,000 to \$999,999, large theatres had revenues from \$1 million to \$5 million, and very large theatres reported revenues over \$5 million. The large and very large sizes are sometimes grouped together and referred to as larger theatres.

Annual average attendance per capita at movie theatres and drive-ins

1998/99

	Number of visits
Canada	3.73
Newfoundland	1.67
Prince Edward Island	3.50
Nova Scotia	2.86
New Brunswick	2.62
Quebec	3.72
Ontario	3.63
Manitoba	3.43
Saskatchewan	3.37
Alberta	4.96
British Columbia	4.04
Yukon and Northwest Territories	2.98

Larger movie theatres continued to gather more market share

Movie attendance tumbled for about four decades, largely the result of the popularity of television beginning in the 1950s and the proliferation of videocassette recorders in the 1980s.

The resurgence in attendance during the 1990s was accompanied by rationalization and restructuring within the film exhibition industry. Many small and unprofitable theatres were replaced by larger multi-screen theatres.

In 1998/99, attendance at movie theatres alone (i.e., excluding drive-ins) rose for the seventh straight year. It increased 12% to 110.9 million, the highest level in 39 years. Between 1991/92 and 1998/99, total attendance at movie theatres increased about 60%.

However, this phenomenal growth was mostly attributable to larger theatres, those with operating revenues of \$1 million and over. After having grown at an average annual rate of about 9% in the previous six years, attendance at these theatres was up 16% in 1998/99 from 1997/98. The 28 new larger theatres accounted for about four-fifths of this increase.

Market share of attendance, by size of movie theatre

	1991/92	1994/95	1997/98	1998/99
Total number of movie theatres	620	582	613	624
Total movie attendance (millions)	69.2	81.1	96.8	110.9
	%			
Small theatres				
Number of theatres	54	49	48	44
Attendance	16	11	9	7
Medium theatres				
Number of theatres	19	18	14	14
Attendance	17	15	9	9
Larger theatres				
Number of theatres	27	33	38	42
Attendance	67	74	82	84
All theatres				
Number of theatres	100	100	100	100
Attendance	100	100	100	100

The higher attendance growth for larger cinemas also gave them an increased market share. In 1991/92, these theatres accounted for 27% of the total number of theatres and 67% of total attendance. By 1998/99, these larger theatres accounted for 42% of the total number and 84% of attendance.

In contrast, 89 small and medium-sized cinemas closed between 1991/92 and 1998/99, and attendance at theatres in these categories fell 22%. Their market share also dropped to 16%, less than one-half of their share at the beginning of the 1990s.

The increase in overall movie attendance between 1991/92 and 1998/99 was accompanied by increases in the number of screens and the number of seats. The number of screens grew 53% to 2,468, and the number of seats rose 26% to 603,245.

Again, these growth rates were driven by the larger theatres, which saw their market share of screens grow from 53% in 1991/92 to 70% in 1998/99. Similarly, the share of seats for these larger movie houses rose

from 49% to 68%. The number of screens in small and medium theatres declined 3%.

Profits for larger movie theatres, losses for smaller theatres

Theatres earned total profits of \$73.6 million in 1998/99; the larger ones continued to be profitable, while the smaller ones suffered losses.

Small and medium theatres reported a total loss of \$1 million. Large theatres had profits of \$45.5 million, and very large movie houses earned \$29.1 million.

Despite an increase in attendance, overall profits of movie theatres fell 12% in 1998/99 from 1997/98. This was largely the result of a multi-million dollar building boom that saw the construction and acquisition of many new megaplexes, as well as the conversion of many existing smaller theatres into multi-screen theatres.

For example, in 1998/99, the 28 new larger complexes opened 244 screens. This expansion was accompanied by increased operating costs. The higher occupancy costs and greater capital cost allowance and debt payments (depreciation and amortization expenses) were largely responsible for the drop in theatre profitability.

The larger theatres attracted greater numbers of patrons, which translated into larger box office revenues. These theatres were also able to cut their expenses and operate more efficiently than the smaller ones.

Drive-in attendance dropped for fourth straight year

Drive-in theatres posted profits of \$2.1 million in 1998/99, down 24% from 1997/98. Box office receipts were hit hardest, declining 17% to \$11.1 million. Although there were overall job losses at drive-ins (primarily the result of establishments closing), wages still represented about 25% of expenses.

As was the case with indoor theatres, larger drive-ins did better than their smaller counterparts. Although profits for small and medium drive-ins declined 34%, profits were down only 3% for larger ones. While larger drive-ins saw a 4% increase in gross profit from the refreshment bar, they reported a 7% drop in gross profit from the box office.

Selected data from the Motion Picture Theatres Survey are now available in table format in *Movie theatres and drive-ins 1998/99* (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 or data quality of this release, or to order standard or special tabulations, contact Norman Verma (613-951-6863; fax: 613-951-9040; vermnor@statcan.ca), Culture Statistics Program. ■

OTHER RELEASES

New release date for Travel between Canada and other countries

August 2000

The monthly "Travel between Canada and other countries" release, containing data for August, has been delayed. Originally scheduled for tomorrow, October 17, the release has been postponed to October 24.

For more information, contact Johanne Plante (613-951-1910; fax: 613-951-2909; planjoh@statcan.ca), Culture, Tourism and the Centre for Education Statistics. ■

Quarterly Retail Commodity Survey

Second quarter 2000 (preliminary)

Consumers purchased \$71.6 billion worth of goods and services from retail stores in the second quarter, 6.4% more than they did in the second quarter of 1999. Sales were up in most of the major commodity groupings, especially in the automotive fuels, oils and additives group. Also posting healthy year-over-year increases were: home furnishings and electronics; motor vehicles, parts and services; and health and personal care products. Sales of clothing, footwear and accessories were relatively unchanged. (All data in this release are not adjusted for seasonality.)

Sales by commodity, all retail stores

	Second quarter 1999 ^r	First quarter 2000 ^r	Second quarter 2000 ^p	Second quarter 1999 to second quarter 2000
unadjusted				
	\$ millions			% change
Commodities				
Food and beverages	14,886	13,920	15,409	3.5
Health and personal care products	4,410	4,466	4,684	6.2
Clothing, footwear and accessories	6,080	4,707	6,087	0.1
Home furnishings and electronics	4,364	4,349	4,821	10.5
Motor vehicles, parts and services	21,246	17,745	22,713	6.9
Automotive fuels, oils and additives	4,298	4,790	5,389	25.4
All other goods and services	12,016	9,345	12,519	4.2
Total	67,298	59,322	71,623	6.4

^r Revised data.

^p Preliminary data.

Drivers spent significantly more on automotive fuels, oils and additives in the second quarter of 2000 compared with the second quarter of 1999. Sales for this commodity group (\$5.4 billion) were up 25% over the same period of 1999. The price of gasoline, which began increasing in March 1999, continued to be the driving force behind these and previous quarterly sales advances. Gas prices in the second quarter of 2000 were up 24% over the same period of 1999.

Higher consumer demand for big ticket items continued to boost the sales of home furnishings and electronics. Spending on these items increased 10% from the second quarter of 1999 to \$4.8 billion. Sales of all components of the home furnishings and electronics category were up over last year. Healthy gains of 17% each were reported for: televisions and audio/video equipment; telephones and home office electronics; and nursery furniture and equipment. Retail sales of computers, related equipment and software were also brisk, advancing 13%. (Electronics includes computers when they are sold by retailers not specialized in the sales of computers. For historical reasons, stores that specialize in computer sales are classified as wholesalers and are not included in the estimates above.)

Sales of motor vehicles, parts and services (\$22.7 billion) rose 7% in the second quarter from the same period of 1999. New cars saw the greatest gains, with sales 13% higher than in the second quarter of 1999. In contrast, sales of new trucks, vans and sport utility vehicles were up by only 2%. Consumer demand for used vehicles also contributed to the overall sales increase for this commodity group, up 9% over the same period of 1999.

Shoppers spent more on health and personal care products in the second quarter of 2000. Sales rose to \$4.7 billion, up 6% from the same period of 1999. Sales of prescription drugs accounted for most of the growth, increasing 11%. As a result, consumers spent 44% of all their health and personal care product dollars on prescription drugs, up 2 percentage points from the second quarter of 1999. Partly offsetting the rise in spending on prescription drugs was a 9% decline in spending on cosmetics and fragrances.

Consumers continued to buy the majority of their health and personal care products from drug stores. However, they also purchased many of these items from food and general merchandise stores. In the second quarter, shoppers purchased 58% of these products from drug stores, 19% from food stores

and 15% from general merchandise stores. Toiletries and personal care products were just as likely to be bought from food stores as they were from drug stores; both types of stores controlled 32% of the market in the second quarter. Compared with the second quarter of 1999, though, both drug and food stores lost part of their market share of these products; drug stores lost 4 percentage points and food stores 1 percentage point. In contrast, general merchandise stores gained almost 5 percentage points, increasing their market share of toiletries and personal care products to 26%.

Sales of clothing, footwear and accessories (\$6.1 billion) were basically unchanged (+ 0.1%) in the second quarter. Sales of women's and men's clothing and accessories were relatively flat, while sales of children's clothing rose 7%. Sales of both athletic and non-athletic footwear were down. Of all the clothing purchased in retail stores across Canada in the second quarter, 57% was women's clothing, 29% was men's clothing, 12% was children's clothing and the remaining 2% was unisex clothing.

The flat sales at the aggregate level for clothing hide some of the movements within the clothing

sector. Shoppers purchased 59% of their clothing from specialty clothing stores in the second quarter of 2000, up 2 percentage points over the same quarter of 1999. Women's clothing was more likely to be bought from specialty women's clothing stores, but men's clothing was more likely to be bought from general merchandise stores. Of all the men's clothing sold, only one-quarter was bought from men's clothing stores, while one-third was bought from general merchandise stores. In contrast, 42% of women's clothing was bought from specialty women's clothing stores and 29% from general merchandise stores. Other specialty clothing stores (such as family clothing stores) also sold 24% of all women's clothing and 30% of all men's clothing.

Data for 1997, 1998 and 1999 have been revised and are now available. For more information, contact the Client Services Unit of Distributive Trades Division (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Leslie Kiss (613-951-3556), Distributive Trades Division.

Commodity share of sales within store types Second quarter 2000

	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	77.8	5.7	0.1	0.0	10.5	5.9	21.5
Health and personal care products	5.7	81.4	1.3	0.0	6.0	1.0	6.5
Clothing, footwear and accessories	0.3	0.6	92.0	0.0	16.1	2.4	8.5
Home furnishings and electronics	0.4	3.4	1.3	85.8	11.0	0.8	6.7
Motor vehicles, parts and services	0.1	0.0	0.0	0.6	25.2	57.9	31.7
Automotive fuels, oils and additives	2.3	0.0	0.0	0.0	1.9	14.1	7.5
All other goods and services	13.4	8.9	5.3	13.5	29.2	17.8	17.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Commodity share of sales across store types

Second quarter 2000

	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	77.7	1.2	0.0	0.0	8.0	13.0	100.0
Health and personal care	18.7	57.7	1.0	0.0	15.1	7.5	100.0
Clothing, footwear and accessories	0.8	0.3	54.5	0.0	31.1	13.3	100.0
Home furnishings and electronics	1.4	2.3	1.0	62.6	26.7	6.0	100.0
Motor vehicles, parts and services	0.0	0.0	0.0	0.1	13.0	86.9	100.0
Automotive fuels, oils and additives	6.5	0.0	0.0	0.0	4.2	89.3	100.0
All other goods and services	16.5	2.4	1.5	3.8	27.4	48.4	100.0
Total	21.5	4.6	5.0	4.9	16.4	47.5	100.0

Commodity share of clothing sales across store types

Second quarter 2000

	Men's clothing stores	Women's clothing stores	Other clothing stores	General merchandise stores	All other stores	All retail stores
	%					
Commodities						
Clothing and accessories	7.5	24.1	27.7	32.7	8.0	100.0
Women's clothing and accessories	0.1	41.7	23.6	29.1	5.5	100.0
Men's clothing and accessories	25.3	1.0	30.1	33.0	10.6	100.0
Children's clothing and accessories	0.8	2.0	35.1	54.8	7.3	100.0

Railway carloadings

Seven-day period ending August 31, 2000

Non-intermodal traffic loaded during the seven-day period ending August 31 decreased 1.6 % to 6.5 million tonnes compared with the same period of 1999. The number of cars loaded decreased 0.9 %.

Intermodal traffic during the reference week totalled 629 000 tonnes, a 20.5 % increase from the same period of 1999. The year-to-date figures are up 15.1 %.

Total traffic did not change during the period. This brought the year-to-date total to 178.2 million tonnes, an increase of 6.7 % from the same period of 1999.

All year-to-date figures have been revised.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Robert Larocque (613-951-2486; fax: 613-951-0009; laroque@statcan.ca), Transportation Division. ■

Industrial monitor on CD-ROM

October 2000

The *Industrial monitor on CD-ROM* offers up-to-date data on more than 150 manufacturing industries and 33 other industries covering construction, wholesale trade and retail trade. This information is offered for 25 sectors, and can be purchased by individual sector or as a complete package.

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For more information, or to request a free demonstration CD-ROM, contact Yolande Chantigny (1-800-887-IMAD [4623]; 613-951-IMAD [4623]; fax: 613-951-3688; imad@statcan.ca), Industry Measures and Analysis Division, or contact your nearest Statistics Canada Regional Reference Centre. ■

NEW PRODUCTS

Industrial monitor on CD-ROM, October 2000
Catalogue number 15F0015XCB (\$995).

**Air passenger origin and destination,
Canada–United States report**, 1998
Catalogue number 51-205-XIB (\$35).

Movie theatres and drive-ins, 1998/99
Catalogue number 87F0009XPE (\$50).

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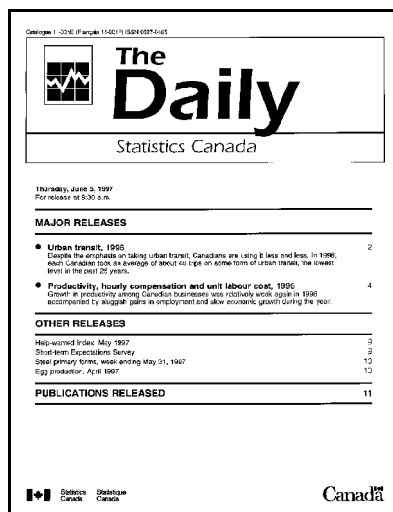
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