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Statistics Canada

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MAJOR RELEASES

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MAJOR RELEASES

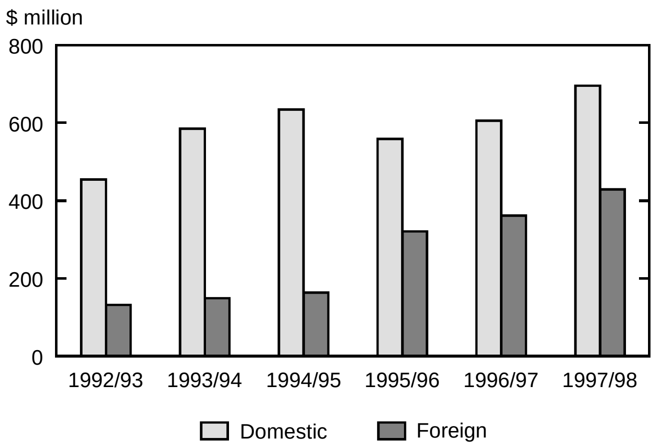
Film, video and audio-visual production, laboratories, and post-production
1997/98

In 1997/98, the independent film, television and video production industry posted a fifth straight year of strong growth in production revenues, surpassing the $1 billion mark for the first time.

Production revenue reached $1.1 billion, up 16% from 1996/97, the result of higher revenues from television programming earned by the largest production companies. From 1992/93, production revenues have grown at an average annual rate of 14%. The nation's top 10 producers accounted for 98% of the growth in production revenues in 1997/98.

The industry grew substantially during the 1990s, mainly the result of export sales that more than tripled. Between 1992/93 and 1997/98, production revenues almost doubled; foreign sales accounted for 55% of this growth.

Domestic and foreign production revenue, Canada, 1992/93 to 1997/98



In 1997/98, exports accounted for 38% of all production revenue, compared with only 23% five years earlier. Revenue from exports amounted to $428.9 million.

Total revenues, which also includes activities such as the rental of production facilities, post-production services, and the distribution of other producers' products, reached $1.4 billion in 1997/98, up 11% from the previous year.

Note to readers

This release summarizes the results of the 1997/98 census of 739 Canadian film, video and audio-visual production companies and 221 Canadian motion picture laboratories and post-production companies. The data do not include location shooting in Canada by foreign film producers, production data from the National Film Board, or 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, educational institutions, government boards, agencies, crown corporations or departments, and 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, special effects and providing video-production facilities.

Non-production revenues for film and video producers are derived 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 and dividends but excluding equity investment and loans.

Non-production revenues for laboratories and post-production companies include subsidies, grants, interest and earnings on investments.

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.

Film, video and audio-visual production
1992-93 to 1997-98

	1992/93	1996/97	1997/98	1992/93 to 1997/98
	$ millions			% change
Production revenue				
Exports	132.0	361.5	428.9	224.9
Domestic	454.4	605.5	695.5	53.1
Sub-total	586.4	967.0	1,124.4	91.7
Non-Production revenue	111.0	318.1	303.3	173.2
Total revenue	697.4	1,285.1	1,427.1	104.6
Total operating expenses	637.0	1,199.2	1,326.3	108.2
Profit	60.4	85.9	101.4	67.9
Profit as a percentage of total revenues	8.7	6.7	7.1	

Television the single most important revenue source

Sales of television productions, again the single most important source of revenue in the film, video and audio-visual industry, accounted for 45% of all production revenue in 1997/98. Production revenues from television reached $504.7 million, up 14% from 1996/97.

Between 1992/93 and 1997/98, domestic sales of television productions grew 31%, and exports more than doubled. In fact, during this same five-year period, television was the driving force behind foreign sales in the industry, accounting for about 48% of the growth in exports.

Advertising sales, virtually all domestic, accounted for almost one-quarter of domestic production revenues; theatrical features accounted for about 1%.

Production revenue by client type
1997/98

	Domestic	Foreign	Total
	$ millions		
Television	251.8	252.9	504.7
Feature films	6.6	47.1	53.7
Advertising	163.3	10.6	173.9
Other	273.9	118.3	392.2
Total	695.6	428.9	1,124.4

Strong growth in full-time employment

In 1997/98, full-time employment in the industry reached 4,005 jobs, a 63% increase from 1992/93. There were increases in every year during this period.

Part-time and freelance employment increased 65% during this same five-year period to 16,808 positions. The industry paid $309.5 million in wages and salaries to all employees in 1997/98, up 58% from 1992/93.

Producers specializing in television productions were the most important employers. They employed 46% of full-time workers in 1997/98, and accounted for 68% of the growth in full-time jobs from 1992/93.

Ontario-based producers were the largest employers, paying 54% of all salaries and wages; Quebec-based companies paid 31%.

Ontario led independent production

In 1997/98, Ontario, home of the largest independent producers, generated 63% of production revenues of about $704.9 million. More than half of these production revenues in Ontario, about $373.6 million, came from foreign markets, and these sales accounted for 87% of total Canadian foreign sales. From 1992/93 to 1997-98, production revenue earned by Ontario-based companies has risen by 123%, while exports have grown by 221%.

The success of Ontario producers in foreign sales can be attributed to a small number of large producers specialized in television production. The top 20 producers (by total revenue) accounted for 68% of total revenues in 1997/98. Nine of these producers had their head offices in Ontario, and these nine alone accounted for 54% of total revenues.

Companies based in Quebec, the second largest producer of film, video and audio-visual products, earned 23% of total industry revenues, a share of the market that it has maintained in recent years. Total revenue in Quebec grew by 73% from 1992/93 to 1997/98; exports grew by 200%. Television was the most important sector in Quebec, with 51% of production revenues.

Atlantic Canada and Western Canada, although popular with many foreign-based companies shooting feature films and television productions, accounted for only 10% ($148.5 million) of the domestic-based industry revenues in 1997/98. Even though companies in these regions have seen their relative share of the industry decline from 18% five years ago, their total revenues have increased by 20% over the same period.

Laboratories, production and post-production services

The success of the production industry was echoed by gains in the laboratory and post-production industry. Between 1992/93 and 1997/98, operating revenues in labs and post-production nearly doubled to $596.8 million. Combined, the production industry and the post-production and laboratory industry were worth more than $2.0 billion.

Film laboratories and post-production services industry
1992/93 to 1997/98

	1992/93	1996/97	1997/98	1996/97 to 1997/98
	$ millions			% change
Total operating revenue	309.8	503.6	596.8	92.6
Percentage from foreign sources	..	..	45	..
Total operating expenses	294.8	419.1	508.6	72.5
Profit	15.0	84.5	88.1	487.3
Profit as a percentage of operating revenues	4.8	16.8	14.8	

.. *Figures not available.*

Full-time employment in labs and post-production increased nearly 75% over this five-year period to 3,307, while the number of part-time and freelance positions increased 33% to 1,544. Salaries, wages, benefits and freelance fees rose from $82.2 million to $151.5 million.

In 1997/98, two-thirds of operating revenues were generated in Ontario, the largest centre of activity. This pattern has persisted over recent years.

Foreign sales were almost as important in laboratory and post-production work as they were in production. Forty-five percent of operating revenues, about $268.2 million, were earned from foreign clients in 1997/98. Of these foreign revenues, the most important source was, by far, the United States, which accounted for 97% of foreign sales.

For further information, to order tables, or to enquire about the concepts, methods or data quality of this release, contact Michael Pedersen (613-951-3305, fax: 613-951-9040; *pedemic@statcan.ca*), Culture Statistics Program. ■

OTHER RELEASES

Department store sales and stocks
February 2000

In February, department store sales fell to $1.49 billion (seasonally adjusted), down 2.5% from January. The decline followed a substantial 7.0% increase in January.

Sales have generally been falling since the end of the summer of 1999. Previously, they had been rising since early 1996, with the exception of a pause in the spring and summer of 1998.

Despite the downward movement observed in sales since the end of the summer of 1999, and because of the smaller number of department stores, average sales per location have resumed their upward movement during the last few months. After peaking at $2.0 million in August 1999 and then softening as a result of restructuring in the sector, average sales per location rebounded to a new high of $2.1 million in January. In February, they were down slightly, but remained 2.3% above their August 1999 peak.

Department store sales, including concessions

	Feb. 1999	Feb. 2000	Feb. 1999 to Feb. 2000	Jan. to Feb. 2000	Jan.-Feb. 1999 to Jan.-Feb. 2000
	unadjusted				
	$ millions		% change	$ millions	% change
Canada	**988.7**	**1,032.8**	**4.5**	**2,044.2**	**3.3**
Newfoundland and Prince Edward Island[1]	18.4	20.4	10.4	39.6	10.0
Nova Scotia	27.7	29.7	7.2	57.0	1.9
New Brunswick	20.2	22.8	12.9	44.0	8.9
Quebec	175.9	187.6	6.6	372.9	2.9
Ontario	423.5	442.0	4.4	878.5	3.8
Manitoba	41.5	43.6	5.0	84.9	3.6
Saskatchewan	33.7	36.7	8.9	72.6	8.1
Alberta	120.2	124.2	3.3	246.0	4.5
British Columbia, Yukon, Northwest Territories and Nunavut[1]	127.6	125.9	-1.3	248.7	-1.8

1 *For confidentiality reasons, data for Newfoundland and Prince Edward Island are combined, as are data for British Columbia, Yukon, the Northwest Territories and Nunavut.*

Unadjusted for seasonality, department store sales at the national level were up 4.5% in February compared with the same month in 1999. Over the same one-year period, sales grew in nearly every province. The largest year-over-year advances were in New Brunswick (+12.9%), the region consisting of Newfoundland and Prince Edward Island (+10.4%), and Saskatchewan (+8.9%). The region consisting of British Columbia, Yukon, the Northwest Territories and Nunavut posted the only decline (-1.3%) in February.

Available on CANSIM: matrices 111-113.

To order data, or for general information, contact the Client Services Unit (613-951-3549; 1-877-421-3067; *retailinfo@statcan.ca*). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Clérance Kimanyi (613-951-6363; *kimacle@statcan.ca*), Retail Trade Section, Distributive Trades Division. ■

Pipeline transportation of crude oil and refined petroleum products
January 2000

Net receipts of crude oil and equivalent hydrocarbons totalled 13 005 053 cubic metres in January, up 6.4% from January 1999. Net receipts of liquefied petroleum gases and refined petroleum products in January (6 872 984 cubic metres) were 2.3% higher than in January 1999.

Pipeline exports of crude oil (6 107 056 cubic metres) increased 10.8% from January 1999, and pipeline imports (1 941 667 cubic metres) increased 38.2%.

January deliveries of crude oil by pipeline to Canadian refineries totalled 5 784 053 cubic metres, down 0.1% from 1999. January deliveries of liquefied petroleum gases and refined petroleum products rose 1.2% to 599 136 cubic metres.

Available on CANSIM: matrices 181, and 591-595.

The January issue of *Pipeline transportation of crude oil and refined petroleum products* (55-001-XIB, $9/$86) will be available soon. See *How to order publications*.

For further information, or to enquire about the concepts, methods and data quality of this release, contact Eleonore Harding (613-951-5708; *hardele@statcan.ca*), Energy Section, Manufacturing, Construction and Energy Division. ■

Oils and fats
January 2000

Production of all types of deodorized oils totalled 94 908 tonnes in January, an increase of 1.8% from 93 200 tonnes in December 1999. January production was down 1.3% from the 96 143 tonnes produced in the same month in 1999.

Domestic sales of deodorized margarine oil were 9 676 tonnes; deodorized shortening oil sales were 23 748 tonnes; and deodorized salad oil sales were 33 765 tonnes in January.

Available on CANSIM: matrix 185.

The January issue of *Oils and fats* (32-006-XIB, $5/$47) is now available. See *How to order publications*.

For more information, or to enquire about the concepts, methods and data quality of this release, contact Peter Zylstra (613-951-3511; *Zylspet@statcan.ca*), Manufacturing, Construction and Energy Division. ■

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Supply and disposition of crude oil and natural gas, December 1999
Catalogue number 26-006-XPB ($19/$186).

Coal mining, 1998
Catalogue number 26-206-XIB ($/$19).

Oils and fats, January 2000
Catalogue number 32-006-XIB ($5/$47).

Retail trade, January 2000
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Retail trade, January 2000
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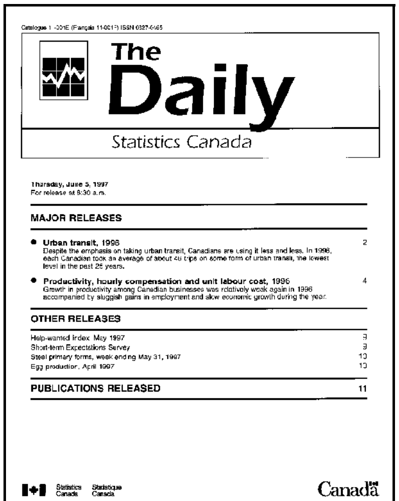
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- **Productivity, hourly compensation and unit labour cost, 1996** 4
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