



The Daily

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MAJOR RELEASES

- **National tourism indicators, first quarter 2004**

Tourism spending advanced 0.8% in the first quarter of 2004, after a sharp 3.3% increase in the fourth quarter of 2003. Higher domestic tourism spending accounted for most of the gain, as spending by international visitors to Canada slowed down sharply from the fourth quarter of 2003.

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- **Movie theatres and drive-ins, 2002/03**

More Canadians than ever before flocked to the silver screen last year, lured by mega-theatres and mega-movies. Total attendance at movie theatres and drive-ins hit a record high of 125.7 million in 2002/03, up 5.4% from 2000/01, the last time the survey was conducted.

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MAJOR RELEASES

National tourism indicators

First quarter 2004

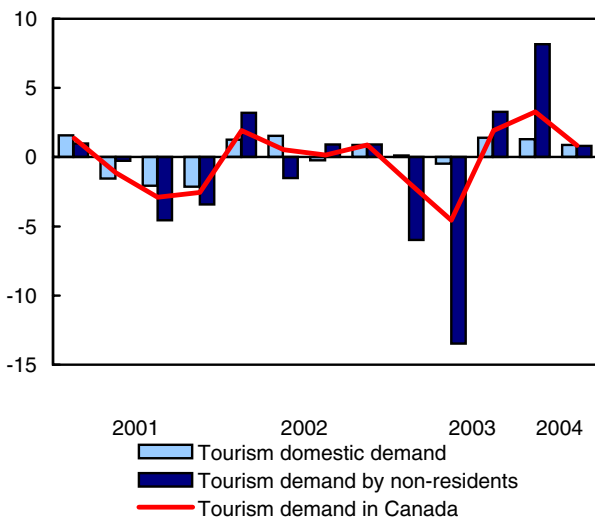
Tourism spending advanced 0.8% in the first quarter of 2004, after a sharp 3.3% increase in the fourth quarter of 2003. Higher domestic tourism spending accounted for most of the gain, as spending by international visitors to Canada slowed down sharply from the fourth quarter of 2003.

Increased spending by international visitors

Spending by international visitors to Canada advanced 0.8% in the first quarter, down sharply from the 8.2% jump registered in the previous quarter. The number of international visitors to Canada fell 3.2%, entirely the result of fewer visitors from the United States.

Tourism spending advances at weaker pace

Percentage change from preceding quarter
Adjusted for seasonal variation and inflation



Canada's international travel deficit slipped to \$1.4 billion from \$1.3 billion in the previous quarter, as Canadians' spending abroad outpaced non-resident spending in Canada. The deficit indicates that Canadian travellers spend more abroad than international visitors spend in Canada.

The rally of the Canadian dollar against the US dollar, which occurred throughout 2003, came to a halt

Note to readers

With the first quarter 2004 release of the National Tourism Indicators (NTI), the estimates have been revised from the first quarter of 1997 through to the fourth quarter of 2003. These data revisions reflect the incorporation of updated Tourism Satellite Account benchmarks and other source data. Also, this issue marks the inauguration of a new revision policy that calls for updating of the past several years of estimates with each first quarter NTI release. For more information see the article "The 1997-2003 revisions of the National Tourism Indicators" in National tourism indicators (13-009-XIB, free).

Levels and shares of tourism spending are expressed in current dollars, adjusted for seasonal variations. Growth rates of tourism spending are expressed in real terms (i.e., adjusted for price changes) as well as adjusted for seasonal variations, unless otherwise indicated. Employment data are also seasonally adjusted. Associated percentage changes are presented at quarterly rates.

in the first quarter of 2004. The higher dollar makes it cheaper for Canadians to travel abroad and more expensive for non-residents to visit Canada.

Canadians spending on tourism advances for third consecutive quarter

Domestic tourism spending increased 0.9% in the first quarter, after gaining 1.3% in the previous quarter.

Canadians' spending on air transportation was up 2.3% in the first quarter of 2004, a weaker pace than that registered in the second half of 2003. The number of Canadians travelling abroad edged up 0.5%, after increasing 5.4% in the fourth quarter of 2003, and 6.8% in the third.

Widespread advances in spending

Widespread gains were posted in the first quarter across most of the major components of tourism spending. However, the gains were weaker than in the fourth quarter of 2003, and spending on accommodation slipped.

Demand for accommodation edged down 0.4%, after jumping 5.7% in the previous quarter, as a result of lower spending by both Canadians and non-resident visitors to Canada.

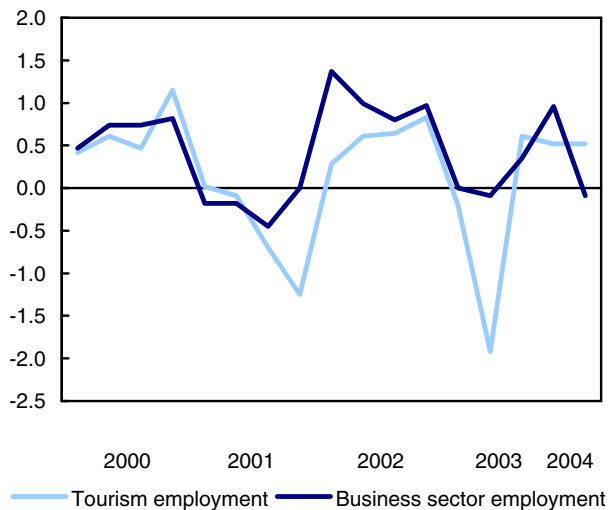
Tourism employment picks up

Tourism employment picked up 0.5% in the first quarter, matching the pace of the previous quarter. The

job gains were widespread across tourism industries, with a notable 1.6% increase in the air transportation industry.

Tourism employment continues to grow

Percentage change from preceding quarter
Adjusted for seasonal variation



Tourism GDP in tandem with economy

Tourism gross domestic product (GDP) advanced 0.6% in the first quarter, matching economy-wide GDP growth. Gains were registered for all the major tourism industries except the accommodation services industry. Tourism GDP slipped 0.6% in this industry.

Available on CANSIM: tables 387-0001 to 387-0010.

Definitions, data sources and methods: survey number 1910.

The first quarter 2004 issue of *National Tourism Indicators* (13-009-XIB, free) is now available on our website. From the *Our products and services* page, under *Browse our Internet publications*, choose *Free*, then *National accounts*. To order a paper copy of the publication (13-009-XPB, free), contact Client Services (613-951-3640; fax: 613-951-3618; iead-info-dcrd@statcan.ca).

For more information, or to enquire about the concepts, methods or data quality of this release, contact the information officer (613-951-3640), Income and Expenditure Accounts Division.

□

National tourism indicators at 1997 prices

First quarter 2004

	2002	2003	2002 to 2003	Third quarter 2003	Fourth quarter 2003	First quarter 2004	Fourth quarter 2003 to first quarter 2004
	\$ millions, 1997 prices		% change	\$ millions, 1997 prices, seasonally adjusted			% change
Total tourism expenditures							
Tourism demand in Canada	48,713	47,392	-2.7	11,726	12,109	12,212	0.8
Tourism demand by non-residents	15,984	14,099	-11.8	3,382	3,658	3,687	0.8
Tourism domestic demand	32,729	33,293	1.7	8,345	8,452	8,525	0.9
Transportation							
Tourism demand in Canada	18,026	17,144	-4.9	4,228	4,401	4,465	1.4
Tourism demand by non-residents	4,174	3,495	-16.3	838	910	923	1.4
Tourism domestic demand	13,852	13,649	-1.5	3,390	3,491	3,542	1.4
Accommodation							
Tourism demand in Canada	7,176	6,831	-4.8	1,674	1,770	1,763	-0.4
Tourism demand by non-residents	3,736	3,422	-8.4	816	912	907	-0.5
Tourism domestic demand	3,440	3,409	-0.9	858	858	856	-0.3
Food and beverage services							
Tourism demand in Canada	7,594	7,534	-0.8	1,886	1,913	1,920	0.4
Tourism demand by non-residents	2,626	2,301	-12.4	552	595	596	0.2
Tourism domestic demand	4,969	5,233	5.3	1,334	1,318	1,323	0.4
Other tourism commodities							
Tourism demand in Canada	8,339	8,432	1.1	2,089	2,131	2,155	1.1
Tourism demand by non-residents	2,133	1,968	-7.7	477	500	502	0.4
Tourism domestic demand	6,206	6,463	4.1	1,613	1,631	1,653	1.4
Other commodities							
Tourism demand in Canada	7,578	7,451	-1.7	1,850	1,895	1,909	0.8
Tourism demand by non-residents	3,315	2,913	-12.1	699	741	758	2.4
Tourism domestic demand	4,262	4,538	6.5	1,150	1,154	1,151	-0.3

National tourism indicators at current prices

First quarter 2004

	First quarter 2003	Second quarter 2003	Third quarter 2003	Fourth quarter 2003	First quarter 2004	Fourth quarter 2003 to first quarter 2004
	\$ millions current, seasonally adjusted					% change
Total tourism expenditures						
Tourism demand in Canada	13,387	12,616	12,889	13,232	13,424	1.5
Tourism demand by non-residents	4,272	3,681	3,816	4,140	4,181	1.0
Tourism domestic demand	9,115	8,935	9,073	9,092	9,243	1.7
Transportation						
Tourism demand in Canada	4,863	4,438	4,568	4,661	4,830	3.6
Tourism demand by non-residents	1,104	938	996	1,090	1,124	3.2
Tourism domestic demand	3,759	3,501	3,572	3,572	3,705	3.7
Accommodation						
Tourism demand in Canada	2,013	1,806	1,849	1,950	1,918	-1.6
Tourism demand by non-residents	1,037	876	901	1,004	987	-1.7
Tourism domestic demand	976	929	948	946	931	-1.6
Food and beverage services						
Tourism demand in Canada	2,158	2,141	2,188	2,237	2,258	0.9
Tourism demand by non-residents	709	619	640	696	701	0.7
Tourism domestic demand	1,450	1,521	1,548	1,541	1,557	1.0
Other tourism commodities						
Tourism demand in Canada	2,363	2,333	2,346	2,392	2,416	1.0
Tourism demand by non-residents	595	539	551	577	578	0.3
Tourism domestic demand	1,769	1,794	1,795	1,815	1,837	1.2
Other commodities						
Tourism demand in Canada	1,990	1,899	1,938	1,992	2,003	0.5
Tourism demand by non-residents	828	709	728	774	790	2.1
Tourism domestic demand	1,162	1,190	1,210	1,218	1,213	-0.4

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Movie theatres and drive-ins

2002/03

More Canadians than ever before flocked to the silver screen last year, lured by mega-theatres and mega-movies.

Total attendance at movie theatres and drive-ins hit a record high of 125.7 million in 2002/03, up 5.4% from 2000/01, the last time the survey was conducted.

The increase occurred despite a number of theatre closures, which resulted in 284 fewer screens in the country.

However, older larger theatres recorded an 11.9% increase in attendance, the first gain since 1999/2000. Blockbuster movies, which abounded in 2002/03, may have been a factor in this. In addition, 16 larger cinemas—those with operating revenue of \$1 million and over—opened, mostly in urban centres. This combination pushed total attendance to a 43-year high.

Attendance has been generally rising since 1992/93, but the rate of growth has been decelerating in recent years. After increasing 14.0% in 1998/99, attendance rose 6.0% in 1999/2000 and 5.4% in 2002/03.

Attendance rose despite increases in admission prices. For example, the average admission price was up 14.9% from 2000/01 to \$7.24 in 2002/03.

The industry earned \$1.2 billion in operating revenues, up 21.1% from 2000/01. Admission receipts accounted for 69% of this total, while most of the remaining revenues came from refreshment bar sales.

The film exhibition industry also recorded an operating profit of \$64.5 million in 2002/03, rebounding from a loss of \$27.2 million in 2000/01.

The film exhibition industry also had fewer employees as result of theatre closures. The number of full-time staff declined 8.1% to 2,030, and part-time employment fell 20.9% to 15,969.

Drive-in theatres reported a total attendance of 1.5 million (1.2% of all theatre attendance) in 2002/03, down 10.6% from 2000/01, the seventh consecutive decline. Ten drive-ins closed during this period, and operating profits of drive-ins declined 3.5% to \$1.6 million.

Albertans most avid moviegoers

Per-capita attendance in Alberta and British Columbia has continued to be above the national average for at least the past decade. Per-capita attendance in Prince Edward Island, Quebec and Manitoba exceeded the national average for the first time since at least 1997/98.

Note to readers

The Motion Picture Theatres Survey collects data on all movie theatres and drive-in theatres in Canada. The 2002/03 survey included 588 movie theatres and 57 drive-ins, which provided data for the fiscal year from April 1, 2002 to March 31, 2003.

Theatres with total operating revenues of less than \$500,000 are referred to as small theatres. Medium theatres earned \$500,000 to \$999,999 and large theatres earned \$1 million to \$5 million. Very large theatres are those with revenues over \$5 million. The large and very large sizes are sometimes grouped together in this release and referred to as larger theatres.

Changes in older theatres were calculated for establishments that were in operation in both 2000/01 and 2002/03.

The newly opened theatres mentioned in this release included those that opened in 2002/03.

No survey was conducted for the survey year 2001/02. There was a minor revision of certain figures for 2000/01.

Residents of Alberta were still Canada's most avid moviegoers. On average each Albertan went to the movies 5.0 times in 2002/03. The Survey of Household Spending shows that households in Alberta spent an average of \$132 on movies in 2002, the highest of all provinces.

This keen interest in movies in Alberta may be the result of high per-capita income, a younger age structure and a large number of chain-operated theatres in metropolitan areas.

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

	Number of visits				
	1997/98	1998/99	1999/00	2000/01	2002/03
Canada	3.3	3.7	3.9	3.9	4.0
Newfoundland and Labrador	1.6	1.7	1.5	1.4	2.5
Prince Edward Island	3.3	3.5	2.8	3.1	4.1
Nova Scotia	2.7	2.9	3.3	3.5	3.8
New Brunswick	2.2	2.6	2.7	3.1	2.8
Quebec	3.2	3.7	3.9	3.8	4.1
Ontario	3.2	3.5	3.8	3.8	3.8
Manitoba	3.0	3.4	3.8	3.6	4.2
Saskatchewan	2.3	3.4	3.8	3.5	3.7
Alberta	4.7	5.0	5.1	5.0	5.0
British Columbia	3.9	4.0	4.1	4.2	4.1
Yukon, Northwest Territories and Nunavut	3.1	3.0	2.9	3.0	3.7

Led by considerable attendance growth at multi-screen theatres, per-capita attendance nearly doubled in Newfoundland and Labrador from 2000/01. However, the province has still had the lowest per-capita attendance for the last many years.

Newfoundland and Labrador also reported the lowest average household spending on movies in 2002,

about \$67. This may be due to the concentration of theatres in a few larger urban centres and a lack of theatres in the numerous small communities.

Restructuring dominates in theatres

Attendance at movie theatres hit a 44-year high in 2002/03, despite restructuring in the industry that resulted in the closing of 122 theatres. Thirty-five of these were larger movie theatres that reported a total attendance of 8.6 million in 2000/01.

Total attendance at movie theatres, excluding drive-ins, reached 124.2 million in 2002/03, the highest level since 1958/59. Between 2000/01 and 2002/03, the number of visits to movie houses increased 5.6%, after remaining almost constant in 2000/01.

The loss of attendance from closures was almost offset by the opening of 33 new movie houses in 2002/03. These reported a total attendance of 10.3 million. Nearly two-thirds of this attendance was attributable to seven very large theatres, five of which opened in metropolitan centres in Ontario.

The higher attendance for larger theatres also resulted in increased market share. In 1991/92, larger theatres accounted for 27% of all theatres. By 2002/03, their share had grown to 43%. Over the same period, their market share of attendance rose from 67% to 89%.

Although movie theatre attendance increased, the number of seats fell 10.6% between 2000/01 and 2002/03, resulting in higher capacity utilization. For example, the proportion of seats filled, on average, increased from 18% to 24%.

Market share of attendance, by size of movie theatre

	1991/92	1998/99	1999/00	2000/01	2002/03
Total number of movie theatres	620	614	644	677	588
Total movie attendance (millions)	69.2	109.7	117.4	117.6	124.2
	%				
Small theatres					
Number of theatres	54	44	42	48	44
Attendance	16	7	6	7	5
Medium theatres					
Number of theatres	19	14	17	14	13
Attendance	17	9	10	8	6
Larger theatres					
Number of theatres	27	42	41	38	43
Attendance	67	84	84	85	89
All theatres					
Number of theatres	100	100	100	100	100
Attendance	100	100	100	100	100

Profitable year for movie theatres

Movie theatres, excluding drive-ins, reported a total profit of \$62.9 million in 2002/03, rebounding from a

loss of \$28.9 million in 2000/01. Only the larger theatres were profitable, earning an average profit of \$264,000. Medium-sized theatres incurred an average loss of \$41,000 and small theatres, almost \$3,000.

Again, the increase in profits was partly due to rationalization and restructuring within the industry. Thirty-five larger theatres that had reported a total loss of \$2.7 million in 2000/01 were closed, as were 87 small and medium-sized theatres, which had suffered a total loss of \$10.8 million in 2000/01.

Chain-operated movie theatres earned considerably higher profits than the independently operated theatres. This is because most of the chain theatres are multi-screen theatres located in urban centres. In 2002/03, the average profit for each chain theatre was \$191,000, compared to \$26,000 for each independent.

Although 33 newly opened movie houses accounted for 8.3% of the total attendance, they contributed only 1% to the total profits of movie theatres. Sixteen new larger cinemas earned a total of about \$1 million, whereas small and medium-sized theatres had losses of \$386,000. The low profit of larger new cinemas was largely the result of high occupancy costs and significant capital start-up expenses.

The increase in attendance for larger older theatres was accompanied by larger profits for these theatres. These theatres earned a total profit of \$65.7 million in 2002/03, compared with a loss of \$8.5 million in 2000/01.

The growth in attendance and higher admission prices was partly responsible for the profits of the older larger theatres. The average admission price for these cinemas rose 12.9% from 2000/01 to \$7.43 in 2002/03. Their box office revenues grew 26.2% over this period.

Available on CANSIM: table 501-0010.

Definitions, data sources and methods: survey number 2416.

Selected details from the *Motion Picture Theatres Survey* in table format (87F0009XIE, free) are now available online. Data from this survey are also available by province and for the territories. Special tabulations are available on a cost-recovery basis.

For general information, contact Client Services (1-800-307-3382; cult.tourstats@statcan.ca). To order special tables or to enquire about the concepts, methods or data quality of this release, contact Norman Verma (613-951-6863, fax: 613-951-1333; norman.verma@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

□

Movie and drive-in theatres, 2000/01 and 2002/03

	Movie theatres		Drive-ins		Total	
	2000/2001	2002/2003	2000/2001	2002/2003	2000/2001	2002/2003
Number of theatres	677	588	67	57	744	645
Number of screens	3,152	2,886	106	88	3,258	2,974
Full-time employees	2,102	1,922	106	108	2,208	2,030
Part-time employees	19,519	15,449	658	520	20,177	15,969
	'000					
Attendance	117,574	124,191	1,696	1,516	119,271	125,707
Box office receipts (\$)	695,476	843,121	10,250	10,261	705,726	853,383
Total revenues (\$)	1,003,172	1,218,352	17,730	17,506	1,020,901	1,235,858
Profit/loss (\$)	-28,897	62,921	1,672	1,613	-27,226	64,534

Note: Figures may not add to total due to rounding.



OTHER RELEASES

Study: Manure management 2001

Canadian livestock farmers have a wide range of options for managing the manure produced on their farms. Their challenge is to find the proper approach to deliver manure to their crops with minimal impact on the environment, according to a new study.

The study was based on the 2001 Farm Environmental Management Survey, which provides key information about seasonal application of manure to farmland, how it is incorporated into the soil, treatment of stored manure and control of odours, among other issues.

The study shows that the adoption of sound manure management practices on Canadian farms with livestock varies with the type of animal produced and the size of the herd.

About 44% of beef cattle manure was applied to the land in the fall. In contrast, over 40% of both dairy cattle manure and hog manure was applied during the spring.

Forty-seven percent of the manure produced in 2001 was left on the field surface or incorporated into the soil more than a week after it was spread on the field. Only 18% of manure was injected into the soil or incorporated the same day it was applied to the land.

About 53% of beef cattle manure was left on the surface of the soil or incorporated into the soil more than a week after its application, while only 28% of hog manure was applied in this manner. Meanwhile, 13% of beef cattle manure was injected into the ground or incorporated the same day as it was applied; nearly 39% of hog manure was applied in this manner.

Only 4% of Canadian livestock farms used feed additives or feeding strategies to reduce manure nutrient content. However, 40% of the largest hog farms used these techniques.

Only 8% of manure was produced on farms that had formal manure management plans required by government regulations. An additional 13% of manure was produced on farms that had such plans as part of broader nutrient management plans. And about 5% of manure was produced on farms that developed such a plan because of the farm operators' personal concerns for the environment. Formal plans were more common on farms with larger livestock herds.

About one-quarter of farms used some method to control odours associated with livestock buildings. The highest proportion of buildings equipped with odour control methods were found on hog farms.

Definitions, data sources and methods: survey number 5044.

The article *Manure Management in Canada* (21-021-MIE2004001, Vol. 1, no. 2, free) is the second in a series of studies collectively called *Farm Environmental Management in Canada*. It is available free on our website. From the *Our products and services* page, under *Browse our Internet publications*, choose *Free*, then *Agriculture*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Martin S. Beaulieu (613-951-6357; martin.beaulieu@statcan.ca), Agriculture Division. ■

Crude oil and natural gas

April 2004 (preliminary)

Crude oil production rose 8.3% in April, the twelfth consecutive monthly year-over-year increase. Crude oil exports, which accounted for 62.8% of total production, advanced 20.4% over April 2003.

The year-to-date production of crude oil was up 9.8% over the same period of 2003; crude oil exports were also on the rise, up 10.3% compared with the same period last year.

Marketable natural gas production rose 2.1% over April 2003. Natural gas exports, which accounted for 61.0% of total marketable production, increased 5.8%, while domestic sales decreased 8.8%.

Year-to-date marketable natural gas production advanced 1.9% over the same period of 2003. Natural gas exports rose 2.7% and domestic sales declined 2.0%.

Available on CANSIM: tables 126-0001 and 131-0001.

Definitions, data sources and methods: survey number 2198.

Preliminary data at the provincial level are available up to April 2004.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (1-866-873-8789; 613-951-9497; energ@statcan.ca), Manufacturing, Construction and Energy Division. □

Crude oil and natural gas

	April 2003	April 2004	April 2003 to April 2004
	thousands of cubic metres		% change
Crude oil and equivalent hydrocarbons¹			
Production	11 264.1	12 195.2	8.3
Exports	6 364.9	7 660.4	20.4
Imports ²	3 712.0	4 576.7	23.3
Refinery receipts	8 401.2	8 599.5	2.4
	millions of cubic metres		% change
Natural gas³			
Marketable production	13 726.3	14 018.7	2.1
Exports	8 086.0	8 552.6	5.8
Canadian domestic sales ⁴	6 400.3	5 834.2	-8.8
	Jan. to April 2003	Jan. to April 2004	Jan.-April 2003 to Jan.-April 2004
	thousands of cubic metres		% change
Crude oil and equivalent hydrocarbons¹			
Production	45 285.6	49 709.4	9.8
Exports	27 794.4	30 645.2	10.3
Imports ²	17 251.8	18 175.8	5.4
Refinery receipts	35 093.9	35 828.5	2.1
	millions of cubic metres		% change
Natural gas³			
Marketable production	57 661.4	58 766.0	1.9
Exports	34 838.5	35 765.9	2.7
Canadian domestic sales ⁴	32 077.1	31 430.1	-2.0

¹ Disposition may differ from production because of inventory change, industry own-use, etc.

² Crude oil received by Canadian refineries from foreign countries for processing. Data may differ from International Trade Division (ITD) estimates because of timing differences and the inclusion of crude oil landed in Canada for future re-export in the ITD data.

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

⁴ Includes direct sales.

Annual survey of automotive equipment rental and leasing 2002

The automotive equipment rental and leasing industry earned revenues of \$5.5 billion in 2002, up 19.6% from 2001. The profit margin for the industry was 5.5% in 2002, compared with 15.9% in 2001.

Results from the 2002 Annual Survey of Automotive Equipment Rental and Leasing are now available. These data provide information such as the industry's revenue, expenditures, salaries and wages, profit margin, and the percentage distribution of revenue earned by type of service and client base.

Available on CANSIM: table 352-0008.

Definitions, data sources and methods: survey number 2442.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Nathalie Taktek (613-951-5196, nathalie.taktek@a.statcan.ca), Service Industries Division.

Maintenance and repair expenditures in housing 2003

Data on maintenance and repair expenditures in housing for 2003 are now available. Following usual practice, the years 2000 to 2002 were revised.

Available on CANSIM: table 026-0009.

Definitions, data sources and methods: survey number 1901.

contact the information officer (613-951-3640; iead-info-dcrd@statcan.ca), Income and Expenditures Accounts Division. ■

For more information, or to enquire about the concepts, methods or data quality of this release,

NEW PRODUCTS

National tourism indicators, quarterly estimates,
First quarter 2004
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National tourism indicators, quarterly estimates,
First quarter 2004
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Farm environmental management in Canada, 2001,
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Movie theatres and drive-ins: data tables, 2002–2003
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Statistics Canada

Thursday, June 3, 1997
For release at 9:30 a.m.

MAJOR RELEASES

- **Urban transit, 1996** 2
Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took the average of about 15 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 relatively weak again in 1996, accompanied by sluggish gains in employment and slow economic growth during the year.

OTHER RELEASES

- **Map-warmed Index, May 1997** 3
- **Short-term Expectations Survey** 9
- **Steel primary forms, week ending May 31, 1997** 12
- **Egg production, Apr. 1997** 13

PUBLICATIONS RELEASED 11

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