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Study: A review of retail trade in the provinces

2006

Canada's retailers had their busiest year in nearly a decade in 2006, and it was consumers in the three westernmost provinces who increased their spending the most, according to a new study.

Retailers sold \$389.6 billion worth of goods and services in 2006, up 6.4% from 2005, the highest rate of growth in nine years. When price changes were taken into account, retail sales increased by 5.3%.

The study, published in the *Analysis in Brief* series, examined the retail trade industry on a provincial and territorial level in 2006 using data from the Monthly Retail Trade Survey.

The study showed that retail trade increased Canada-wide in 2006. Among the provinces, only three had rates of growth above the national average: Alberta, British Columbia and Saskatchewan.

Consumers in Alberta led the pack with a stellar 15.6% increase in retail spending, a bigger boost than their own impressive 11.8% increase in 2005. It was the third year in a row that Alberta's growth rate was the highest in the country.

Some of the factors behind Alberta's historic high include a 7.5% increase in its average weekly wage rate and 4.8% employment growth. Both rates were the highest among the provinces and territories. Alberta's 3.4% unemployment rate was also the lowest in Canada.

The increase in British Columbia was the province's best since 1995, while resource-rich Saskatchewan experienced a retail sales boom to rival the national average.

In Manitoba, sales growth fell short of the national average, the result of wide differences in growth rates among the various trade groups in the province.

Retail sales growth also fell below the national average in Quebec, even though the increase in spending in the province's pharmacies and personal care stores was the highest in the country.

Ontario's rate of retail growth again lagged behind the national average. In fact, Ontario's share of national retail sales has declined for six straight years, and was lower in 2006 than a decade earlier.

Nova Scotia posted the strongest retail growth among the four Atlantic provinces. The retail growth rate in New Brunswick hit a seven-year high, while in Prince Edward Island it reached a six-year high. Sales in Newfoundland and Labrador improved after two years of weak growth.

At the national level, double-digit growth rates were posted by 4 of the 18 retail trade groups last year. Home furnishing stores led the pack in 2006, with a growth rate of 13.9%. This group was followed by used and recreational motor vehicle and parts dealers (+13.6%), home centres and hardware stores (+10.5%) and pharmacies and personal care stores (+10.3%).

The 13.6% increase in sales at used and recreational motor vehicle and parts dealers was more than twice the 5.1% rate of growth in 2005. It represented the group's strongest growth rate since 1994 and was driven by strong sales of recreational vehicles.

Definitions, data sources and methods: survey numbers, including related surveys, 2406 and 2408.

The analytical article, "Retail Trade: How the Provinces Fared in 2006," which is part of the *Analysis in Brief* series (11-621-MWE2007057, free), is now available online from the *Analytical Studies* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Lucy Chung (613-951-1903), Distributive Trades Division. ■

Film, television and video post-production

2005

Total revenues in the film, television and video post-production industry increased in 2005 compared to the previous year, but an even larger gain in expenses held profits in check.

The industry recorded total revenues of \$844 million, a 7.9% increase from 2004, while expenses rose 10.0%. Half of industry expenses were associated with the cost of goods sold.

As a result, profits totaled \$47.4 million, down from \$58.3 million in 2004. The industry posted a profit margin of 5.6%.

Film, television and video post-production industries include establishments that are primarily engaged in providing post-production services to the motion picture and video industries. These services include specialized motion picture or video post-production services such as editing, transferring films or tapes, subtitling, creating credits, closed captioning, producing computer graphics, animation and special effects, as well as developing and processing motion picture films.

Firms in Ontario and Quebec combined accounted for the vast majority (90%) of total national post-production operating revenue. Ontario firms

dominated Canadian post-production, earning 51.2% of total operating revenues in 2005. Quebec firms accounted for 38.7%, while those in British Columbia represented 8.7%.

Ontario and Quebec firms showed operating profit margins just above the national average at 5.8% and 5.7% respectively, while firms in British Columbia recorded an operating profit margin of 4.9%.

The survey data presented in the rest of this release are based on 259 post-production companies whose combined revenues account for about 95% of the industry's total revenues.

For these 259 companies, survey data show that salaries, wages and benefits rose 7.0% from 2004. In this industry, salaries, wages and benefits accounted for 23.3% of total expenses.

Employment increased 12.7% from 2004 to 2005. Part-time employment was up 27.4%, more than twice the 10.6% rate of growth in full-time employment. Full-time employees accounted for almost 9 out of every 10 employees in 2004.

Although two-thirds of revenue continued to be generated from post-production services to foreign clients, revenue from domestic clients has increased. In 2005, revenues from domestic clients were up 8.6%, more than twice the gain of 4.1% from foreign clients.

In 2005, the top five companies represented almost three-quarters of total revenue and accounted for half the employment in the industry. However, their operating profit margin was 3.9%, slightly lower than the 5.5% margin for the survey portion of the industry. This was due to the higher proportion of expenses these

companies had from cost of goods sold, compared with the overall industry. Salaries, wages and outsourcing costs accounted for one-quarter of total expenses for these five companies.

Note: Data for 2005 should not be compared with previously published film, television and video post-production data, since significant changes were made to the survey. However, some key trends can still be determined, as this release includes data for two previous survey years, 2001 and 2004, using the new 2005 methodology. The survey was not conducted in 2002 and 2003. Data are now collected using a sample that represents 95% of total revenues earned by the film, television and video post-production industry. Administrative data are used to account for the smallest firms.

Definitions, data sources and methods: survey number 2415.

Selected information from the 2005 Survey of Service Industries: Film, Television and Video Post-production are now available in the publication *Film, Video and Audio-visual Post-production: Data Tables, 2005* (87-009-XWE, free) from the *Publications* module of our website. These tables include breakdowns of data by province.

For more information about the survey, or to enquire about the concepts, methods or data quality of this release, contact Gabrielle Zboril (613-951-7001; fax: 613-951-6696; gabrielle.zboril@statcan.ca), Service Industries Division. □

Selected statistics with backcasted data for the film, television and video post-production industry

	2005	2004	2001
		Backcasted data ¹	
	\$ thousands		
Industry estimates²			
Total revenue	843,705	781,861	718,372
Total expenses	796,276	723,584	647,395
Salaries, wages and benefits	185,562	173,440	144,202
	%		
Profit margin	5.6	7.5	9.9
	\$ thousands		
Survey portion²			
Domestic sales (production and post-production)	242,312	223,105	247,929
Foreign sales (production and post-production)	528,226	507,208	422,249
Total production and post-production sales	770,538	730,313	670,178
Total revenue	796,735	738,334	678,379
Personnel expenses	195,090	176,868	155,940
All other expenses	557,882	507,366	456,249
Total expenses	752,972	684,234	612,189
Profit	43,763	54,100	66,191
	number		
Number of full-time employees	2,975	2,689	2,542
Number of part-time employees	484	380	306
	%		
Profit margin	5.5	7.3	9.8

1. Backcasted data have been created in order to be able to compare the data from 2001 and 2004 to 2005. This is necessary because of major changes to the survey including the use of a new frame, a new definition of the film, television and video post-production industry and the use of a sample survey.

2. Industry estimates are based on the surveyed portion and are augmented by administrative data for establishments that were too small to be eligible for sampling. The survey portion includes data for surveyed establishments weighted to represent other establishments that were eligible for sampling but were not selected. The survey portion represents approximately 95% of total industry revenue.

Note: Due to rounding, components may not add up to the total.

Aircraft movement statistics: Major airports

May 2007

For the twelfth consecutive month, aircraft take-offs and landings at Canadian airports with NAV CANADA air traffic control towers or flight service stations increased in year-over-year monthly comparisons. These 96 airports reported 593,331 movements in May compared with 518,505 movements at 97 airports in May 2006, an increase of 14.4%, or 74,826 movements.

Itinerant movements (flights from one airport to another) increased by 8.8% (+32,409 movements) in May compared with the same month a year earlier.

Local movements (flights that remain in the vicinity of the airport) increased by 28.5% (+42,417 movements) in May compared with May 2006.

Available on CANSIM: tables 401-0007 to 401-0020.

Definitions, data sources and methods: survey number 2715.

The May 2007 issue of *Aircraft Movement Statistics: NAV CANADA Towers and Flight Service Stations*, Vol. 1, no. 5 (51-007-XWE, free) is now available from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (toll-free 1-866-500-8400; transportationstatistics@statcan.ca), Transportation Division.

National Occupational Classification for Statistics 2006

The National Occupational Classification for Statistics (NOC-S) 2006, available today, updates Statistics Canada's official classification for occupational data. New occupational titles have been added and some of the occupational descriptions have been made more current.

New occupational titles arise as the division of labour in Canadian society evolves, creating new jobs and new specializations, and as technological change brings with it new terminology. New occupational titles that have now been placed in the NOC-S include the following: home support respite worker, telehealth registered nurse, artificial intelligence designer, e-business manager and e-business website developer.

The work done by people in an occupation also changes over time and this has been reflected in updated descriptions for 46 of the NOC-S's 520 occupations. For example, new descriptions reflect the impact of technological change

on the work performed by data entry clerks; the provision of computer support services to people in their homes; the broader range of work locations for security guards; and the use by carpenters of lightweight steel as well as wood.

The NOC-S 2006 was produced in partnership with Human Resources and Social Development Canada. The first statistical data based on NOC-S 2006 will be the occupational data release from Census 2006.

The NOC-S provides a systematic classification structure that categorizes the entire range of occupational activity in Canada. Its 520 detailed occupations are identified and grouped primarily according to the work usually performed, as determined by the tasks, duties and responsibilities of the occupation.

The *National Occupational Classification for Statistics 2006* (12-583-XWE, free) is available on our website. You can also visit (www.statcan.ca/english/concepts/occupation.htm).

For more information, contact Debra Mair (613-951-2923; fax: 613-951-8578; standards@statcan.ca), Standards Division. ■

New products

Analysis in Brief : Retail Trade: How the Provinces Fared in 2006, no. 57
Catalogue number 11-621-MWE2007057
(free).

National Occupational Classification for Statistics (NOC-S), 2006
Catalogue number 12-583-XWE
(free).

Aircraft Movement Statistics: NAV CANADA Towers and Flight Service Stations, May 2007, Vol. 1, no. 5
Catalogue number 51-007-XWE
(free).

Film, Video and Audio-visual Post-production: Data Tables, 2005
Catalogue number 87-009-XWE
(free).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

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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 an average of about six 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 and industry work force in 1996 accompanied by sluggish gains in employment and slow economic growth during the year.

OTHER RELEASES

- Map-based Index, May 1997 3
- Short-term Expectations Survey 9
- Steel primary forms, week ending May 31, 1997 12
- Egg production, Apr 8, 1997 12

PUBLICATIONS RELEASED 11



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