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Infomat

A Weekly Review

Friday, May 22, 1998

OVERVIEW

- **Shipments regain strength**

  A rebound in the aircraft industry helped push up the level of manufacturers' shipments in March.

- **Price increases for goods and services slow**

  Consumers paid more for goods and services in April than they did a year earlier. This year-over-year increase was lower than those recorded in each of the three previous months, however.

- **Steady growth in Composite Index**

  The leading index continued to grow at a steady pace in April. Manufacturing and most other components have slowed over the last year.

- **Individual income declines**

  The recession of the early 1990s lowered the incomes of individual Canadians between 1990 and 1995. This wiped out the gains made during the second half of the 1980s.

- **Fewer foreign students studying in Canada**

  So far in the 1990s, Canadian schools and universities have gradually lost ground in attracting foreign students. Asia remained the principal source of foreign students in 1995.

- **Trips into and out of Canada decline**

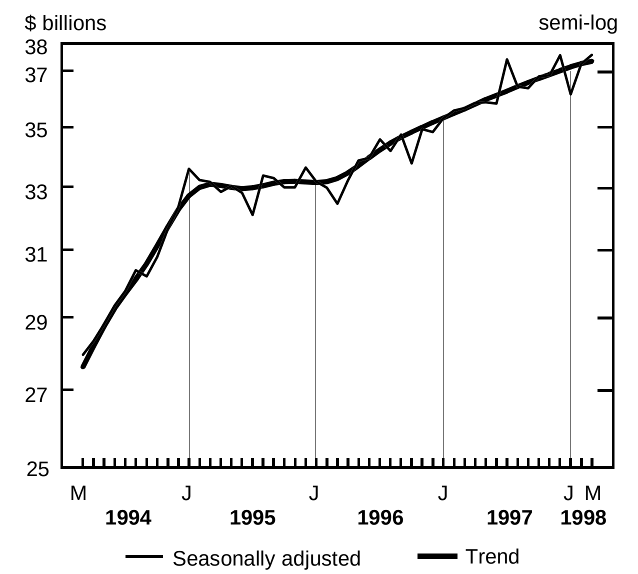
  In March, the number of trips between Canada and other countries decreased in all directions.

Shipments regain strength

Manufacturers' shipments advanced 0.9% to $37.6 billion in March, when the aircraft industry rebounded from a two-month pause. The increase marked a shift back toward the solid growth trend that was sustained from the spring of 1996 until the end of 1997. Shipments were up in 12 of the 22 major industry groups, representing 62.2% of total shipments. Quebec, which normally represents just under a quarter of total shipments at the national level, accounted for over six-tenths of the increase.

With a 27.0% increase, the aircraft and parts industry was the largest contributor to March's gain. The industry has been on an upward trend since early 1997, and it is benefiting from strong order books. Motor vehicles (+1.8%) and motor vehicle parts and accessories (+2.6%) also contributed to the monthly increase. The machinery industry posted the largest offsetting decrease in March (–4.6%); the refined petroleum and coal industry (–2.6%) followed.

Shipments



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... Shipments regain strength

Manufacturers' inventories advanced 0.1% to $48.3 billion. Although inventories have generally been on the rise since the spring of 1996, the trend has been slowing gradually since November 1997. The major contributors to March's higher inventories were the aircraft and parts (+4.9%) and machinery (+2.6%) industries. The electrical and electronic products industry posted the largest offsetting decrease (–3.5%). The increase in shipments outpaced the rise in inventories, which pushed the inventory-to-shipments ratio down from 1.30 in February to 1.28 in March.

Manufacturers' shipments, March 1998
Seasonally adjusted

	$ millions	% change, previous month
Canada	**37,585**	**0.9**
Newfoundland	139	– 9.5
Prince Edward Island	78	2.6
Nova Scotia	543	5.6
New Brunswick	680	2.4
Quebec	8,882	2.5
Ontario	20,206	0.3
Manitoba	891	2.5
Saskatchewan	521	0.8
Alberta	2,799	– 0.6
British Columbia	2,841	0.5
Yukon and Northwest Territories	4	8.0

The backlog of unfilled orders rose 0.2% to $43.5 billion, continuing the upward growth trend that began in late 1996. The motor vehicles industry posted the largest increase in unfilled orders (+4.6%), while the aircraft and parts industry recorded the largest offsetting decline (– 0.7%). Unfilled orders are often considered a key determinant of future shipments. However, half the increase in unfilled orders since the beginning of 1997 has been in the aircraft and parts industry, where some orders can be stretched out over a number of years before they are completed.

Note to readers

Unfilled orders are a stock of orders that will contribute to future shipments, assuming orders are not cancelled. New orders represent orders received whether shipped in the current month or not. They are measured as the sum of shipments for the current month (i.e., orders received this month and shipped within the same month) plus the change in unfilled orders. Some people interpret new orders as orders that will lead to future demand. This is not appropriate because the new orders variable includes orders that have already been shipped. The month-to-month change in new orders may be volatile, particularly if the previous month's change in unfilled orders is large in relation to the current month's change.

Some orders will not be translated into Canadian factory shipments because portions of large contracts can be subcontracted out to other countries.

Available on CANSIM: matrices 9550–9555, 9558, 9559, 9562–9565, 9568–9579 and 9581–9595.

The March 1998 issue of ***Monthly Survey of Manufacturing*** *(31-001-XPB, $20/$196) will be available shortly. For further information, contact Jean-Marie Houle (613-951-7200) or Craig Kuntz (613-951-7092; kuncrai@statcan.ca), Manufacturing, Construction and Energy Division. (See also "Current trends" on page 7.)*

Price increases for goods and services slow

Canadian consumers paid 0.8% more for the goods and services that make up the Consumer Price Index (CPI) in April than they did a year earlier. This year-over-year increase was lower than those recorded in January, February and March, but higher than the one noted in December 1997.

Compared with April 1997, consumers were faced with notably higher prices for fresh vegetables, food from restaurants, telephone services, tuition fees, tobacco products, and travel services. On the other hand, costs were lower for gasoline and fuel oil, computers, and mortgage interest.

Between March and April, consumers benefited from a small 0.1% decline in overall prices. The cost of purchasing and leasing new vehicles declined (– 1.0%), as a large Canadian manufacturer offered rebates on selected vehicles. With the exception of sportswear, women's clothing also cost less (–2.4%). Food purchased from stores was less expensive (– 0.4%), particularly meat. Price decreases were also noted for fuel oil and gasoline, telephone services, and air fares.

The diverse price declines recorded in April were largely offset by increases in the price of gasoline (+1.1%), homeowners' maintenance and repairs (+2.0%), traveller accommodation (+2.7%), and dental care (+2.8%).

Consumer Price Index, April 1998
% change, previous year, not seasonally adjusted

	All-items	Food	Shelter	Transportation	Energy
Canada	**0.8**	**1.7**	**0.0**	**– 0.7**	**– 3.7**
Newfoundland	0.7	1.9	– 1.6	– 1.0	– 6.5
Prince Edward Island	– 0.6	3.2	– 5.0	– 3.1	– 12.5
Nova Scotia	0.6	2.3	– 0.7	– 1.2	– 6.2
New Brunswick	0.3	1.7	0.6	– 3.4	– 6.4
Quebec	1.4	2.2	0.5	– 0.3	– 2.6
Ontario	0.6	2.1	0.0	– 0.8	– 4.8
Manitoba	0.8	– 0.4	0.9	– 0.5	– 2.3
Saskatchewan	1.5	0.4	2.4	0.1	– 3.3
Alberta	1.2	1.3	2.1	– 0.6	– 0.3
British Columbia	0.2	1.0	– 1.6	– 1.0	– 3.1
Whitehorse	1.2	5.1	– 0.6	0.8	– 2.9
Yellowknife	– 0.2	1.9	– 1.6	1.4	– 3.4

Compared with April 1997, Saskatchewan registered the largest average price increases (+1.5%), due to higher prices for shelter, vehicle insurance and telephone services. Prince Edward Island was the only province to record an overall price decline (– 0.6%), largely due to falling energy rates and lower prices for new housing.

(continued on page 3)

... Price increases for goods and services slow

Alberta recorded the highest average monthly price increases (+0.5%) among provinces in April. New Brunswick posted the largest average price decreases (– 0.4%).

Available on CANSIM: matrices 9940–9956.

*The April 1998 issue of **The Consumer Price Index** (62-001-XPB, $11/$103) is now available. For further information, contact Prices Division (613-951-9606; fax: 613-951-2848; infounit@statcan.ca). (See also "Current trends" on page 7.)*

Steady growth in Composite Index

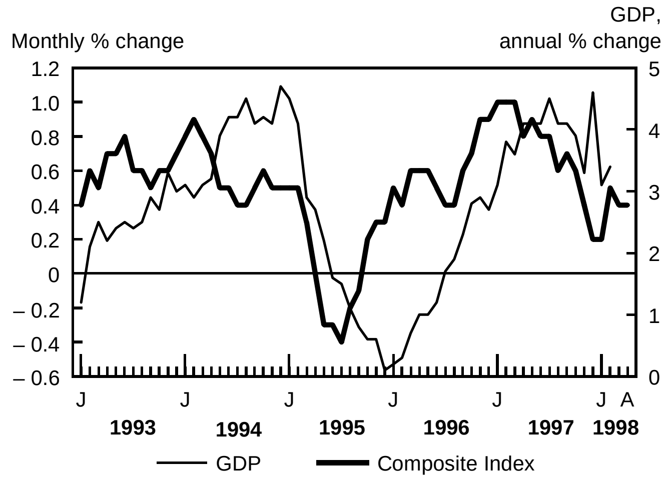
The Composite Index rose 0.4% in April, matching the revised increase recorded for March. However, these advances were only about half the average monthly gains posted for these months in 1997. With the exception of financial markets and business spending, most components have slowed—especially manufacturing.

In April, the stock market continued to add to its advance so far this year. Business services employment soared by 84,000 to lead job growth in the first four months of 1998. This reflects the surge in construction early in the year, as repairs from the ice storm added to the steady growth in business investment. Non-residential construction posted its best gains in 10 years in January and February. If the financial markets and employment in business services were excluded, the leading index would have fallen slightly from its February peak.

New orders fell for a second straight month in April, as household spending and exports remained lacklustre even after the ice storm passed. The deceleration in manufacturing was accompanied by a cut in manpower needs, with the average workweek hitting its lowest level in18 months.

Household spending remained sluggish. The housing index declined 0.7%, as housing starts for multiple units lost all of the ground gained in March. Starts of single-family homes, which are a better indicator of the underlying trend in housing, failed to rebound from a 10% drop in March. Weaker demand for autos continued to hamper retail sales of durable goods, but furniture and appliance sales held up well.

Composite Index



Available on CANSIM: matrix 191.

*For further information on the economy, see the May 1998 issue of **Canadian economic observer** (11-010-XPB, $23/$227), which is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)*

Individual income declines

The nearly 21 million individuals who were income recipients in 1995 had an average total income from all sources of $25,196, down 6% from 1990 after adjustment for inflation. This decrease wiped out the gains made during the second half of the 1980s. As a result, average total income in 1995 was almost identical to that in 1985, and slightly below the level of 1980.

In 1995, the average income for men ($31,117) was 7.8% below the amount recorded in 1990. Between 1985 and 1990, men were just able to recoup the income losses suffered in the recession of the early 1980s. Consequently, in 1995, their average income was 7.6% below that of 1980.

Women, who represented close to half (49.7%) of all income recipients in 1995, had an average income of $19,208, down 2.1% from 1990. Despite the recession of the early 1980s and contrary to men, women had on average increased their purchasing power: their average income increased 15% between 1980 and 1995.

Note to readers

All income data are presented in constant (1995) dollars. Incomes from previous censuses have been adjusted for changes in the price of goods and services using the Consumer Price Index.

Total income comprises the income an individual receives from all sources, including wages and salaries, farm and non-farm self-employment, government transfer payments, investment income, retirement pensions and other money income.

Employment income (or earnings) remained by far the largest component of total income in 1995. However, it continued to decline as a proportion of total income. Employment income accounted for 75 cents of every dollar of income in 1995, down from 78 cents in 1990.

(continued on page 4)

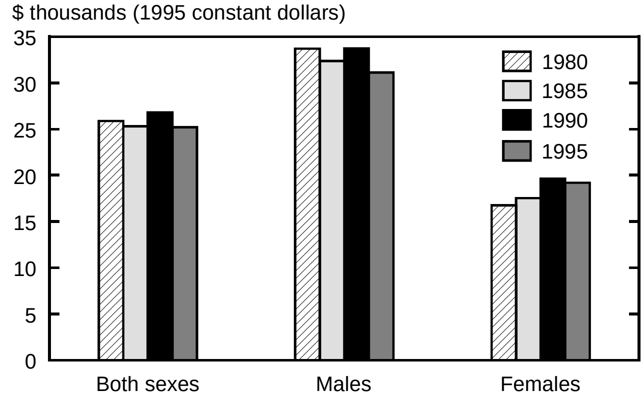
... Individual income declines

The share of government transfer payments, such as old-age pensions, Unemployment Insurance (now known as Employment Insurance) benefits, child tax benefits and Goods and Services Tax credits, contributed 14 cents of every dollar of income in 1995, compared with 11 cents in 1990 and less than 7 cents in 1970. This increase occurred because the total population rose by about one-third, while the population aged 65 and older, which received many of these transfer payments, more than doubled.

Pensions to the elderly accounted for half of all government transfers to individuals. In 1995, the number of Old Age Security recipients increased by 320,000 (+11.5%), but the number of recipients of Canada and Quebec Pension Plan benefits increased by over 1 million persons (+38.7%). The number of recipients of Unemployment Insurance benefits declined 6%, while the number of recipients of child tax benefits declined 8%.

The remaining 11 cents of every dollar of income in 1995 came from sources such as investment income and retirement pensions. This amount increased from about 7 cents in 1970 to 11 cents in 1990, and did not change between 1990 and 1995.

Average total income of individual Canadians



For more information, contact Abdul Rashid (613-951-6897), Labour and Household Survey Analysis Division.

Fewer foreign students studying in Canada

In the fall of 1995, 72,700 men and women from more than 200 countries were studying in Canada (at all formal levels of education), down 11.6% from the peak in 1991. The decline during the 1990s contrasts with the rapid growth registered between 1985 and 1991 (+67.7%). The majority of international students (63.8%) were at the postsecondary level, and 36.2% were at the elementary/secondary level. International enrolment in undergraduate programs at universities posted the most notable decline, falling 16.2% to 18,200.

In 1995, Asia remained the major source of international students (48.4%). Most of the international students from Asia were from Hong Kong: in 1995, 5,900 were studying in Canada. This contrasts with the record 13,750 students who studied in Canada in 1991. Most of this decline was due to an increase in the number of students coming to Canada on permanent resident status. During the past five years, increases in the number of students from Japan and South Korea have offset the declines from Hong Kong. In 1995, the United States sent more students to Canada than any other country. France and the United Kingdom were other major sources of international students.

Ontario hosted the largest number of international students (29,500) in 1995, even though its share declined from 51.2% of the total in 1990 to 40.6%. British Columbia had the largest proportional increase, with its share rising from 14.5% of international students in 1990 to 20.9% in 1995. Similarly, Quebec's share increased from 15.2% to 20.5%.

McGill University registered the largest number of international students (3,600) in 1995, followed by the University of Montréal, the University of British Columbia and the University of Toronto, all with about 2,500 students.

In 1995, the most popular field of study among international university students in Canada was social sciences: it was chosen by 28.6%. This reflects the trend observed among Canadian students in general. By contrast, 14.2% of international students chose the engineering/applied sciences field, compared with 7.2% of Canadians. Another 12.0% chose mathematics/physical sciences, compared with 5.2% of Canadians. Only 3.0% of international students chose education, compared with 11.4% of Canadians.

International student participation in Canadian formal education

Country or region of origin	1991 number	1991 %[1]	1995 number	1995 %[1]
Total[2]	**82,240**	**100.0**	**72,700**	**100.0**
Asia[2]	**44,800**	**55.2**	**34,830**	**48.4**
Hong Kong	13,750	17.0	5,880	8.2
Japan	4,630	5.7	5,700	7.9
South Korea	1,390	1.7	3,600	5.0
China	4,460	5.5	2,850	4.0
Taïwan	3,490	4.3	3,550	4.9
Malaysia	2,220	2.7	1,620	2.2
Sri Lanka	2,500	3.1	2,310	3.2
Europe[2]	**11,640**	**14.3**	**13,730**	**19.1**
France	2,330	2.9	3,080	4.3
United Kingdom	3,020	3.7	3,960	5.5
Africa	**9,240**	**11.4**	**9,080**	**12.6**
North/Central America	**12,050**	**14.9**	**11,010**	**15.3**
United States	6,970	8.6	6,930	9.6
South America	**2,110**	**2.6**	**2,060**	**2.9**
Oceania	**1,000**	**1.2**	**850**	**1.2**
Stateless[3]	**1,120**	**1.3**	**690**	**0.9**
Not reported	**280**	**0.3**	**450**	**0.6**

1. Percentages may not add to 100 due to rounding.
2. Total and sub-totals include countries that are not listed.
3. Mostly refugees.

International student participation in Canadian education, 1993 to 1995 *(81-261-XPB, $23) is now available. For further information, contact Mongi Mouelhi (613-951-1537); for custom tabulations and related services, contact Daniel Perrier (613-951-1503), Culture, Tourism and the Centre for Education Statistics.*

Trips into and out of Canada decline

Canadians made 1.5 million international trips of one night or more in March, down 2.3% from February. At the same time, foreigners visited Canada for at least one night on 1.5 million occasions (–2.7%).

Americans made 1.2 million trips of one night or more to Canada, a 2.5% drop. Car trips, which accounted for most of these visits, declined 3.2% between February and March. Americans also took fewer plane trips to Canada in March (–0.6%).

Canadians made 1.2 million trips of at least one night to the United States in March, down 2.7% from February. The number of such trips peaked at 1.8 million in December 1991, when the Canadian dollar was worth US$0.88. Cross-border car trips recorded the largest drop in Canadians' overnight travel to the United States, falling 3.4%. Air travel for overnight trips to the United States was also down (–2.6%).

In March, the number of trips to Canada by overseas visitors hit its lowest level in three years: 323,000 trips (–3.4%). Meanwhile, the number of trips Canadians made to countries other than the United States decreased 1.0%.

Americans' same-day cross-border car trips to Canada fell 5.5% in March—the largest drop since January 1994. Excursions in the opposite direction also declined, as Canadians' car trips to the United States dropped 1.0%. The monthly number of same-day car trips by Canadians to the United States has been decreasing since November 1991, when Canadians made more than twice as many trips as in March.

Available on CANSIM: matrices 2661–2697, 5780–6048 and 8200–8329.

The March 1998 issue of ***International travel, advance information*** *(66-001-PPB, $8/$73) will be available shortly. For further information, contact Luc Dubois (613-951-1674; fax: 613-951-2909; duboluc@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

Note to readers

Unless otherwise specified, data are seasonally adjusted; that is, adjusted for variations that repeat annually and for variability caused by the different volumes of travellers associated with different days of the week.

Month-to-month comparisons use seasonally adjusted data. Year-over-year comparisons use unadjusted data (the actual traffic counts). An excursion is a same-day trip.

Travel between Canada and other countries, March 1998

	thousands	% change, previous month	thousands	% change, previous year
	seasonally adjusted		unadjusted	
Canadian trips abroad				
Auto trips to the United States				
Same-day	2,536	– 1.0	2,433	– 17.5
One or more nights	682	– 3.4	663	– 24.3
Total trips, one or more nights				
United States[1]	1,152	– 2.7	1,270	– 16.4
Other countries[2]	340	– 1.0	490	1.0
Travel to Canada				
Auto trips from the United States				
Same-day	2,173	– 5.5	1,846	– 2.1
One or more nights	745	– 3.2	379	– 5.9
Total trips, one or more nights				
United States[1]	1,171	– 2.5	647	– 1.8
Other countries[2]	323	– 3.4	184	– 20.1

1. Estimates for the United States include counts of cars and buses, and estimated numbers for planes, trains, boats and other methods.
2. Figures for other countries exclude same-day entries by land only, via the United States.

New from Statistics Canada

Education quarterly review
Winter 1997

The winter 1997 issue of *Education quarterly review* presents feature articles on two important education issues: "The class of '90 revisited: A follow-up of 1990 graduates" and "A profile of home schooling in Canada".

Each issue of *Education quarterly review* also includes a section called "Education at a glance", which collects a series of social, economic and education indicators for Canada, the provinces and territories, and the G-7 countries.

The winter 1997 issue of ***Education quarterly review*** *is now available in both print (81-003-XPB, $21/$68) and electronic (81-003-XIB, $16/$51) versions. For further information, contact Jim Seidle (613-951-1500; fax: 613-951-9040; seidjim@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

New from Statistics Canada – concluded

Basic summary tabulations
1996 Census

This series from the 1996 Census provides summary information for small geographic areas of the country in tabulations using two or more inter-related census variables.

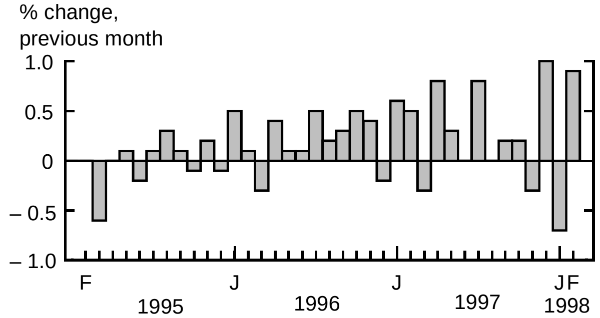
The entire series comprises 66 basic tabulations. Three tabulations on ethnic origin and the visible minority population were recently released. Geographies include census divisions and subdivisions; census metropolitan areas, tracted census agglomerations and census tracts; federal electoral districts (1996 representation order); federal electoral districts (1987 representation order) and enumeration areas; and forward sortation areas. All geographies include data for Canada, the provinces and territories.

Prices begin with a flat fee of $60, plus $1 for each of the first 100 geographic areas, and 5 cents for each additional area.

For further information on this release, contact your nearest Statistics Canada Regional Reference Centre.

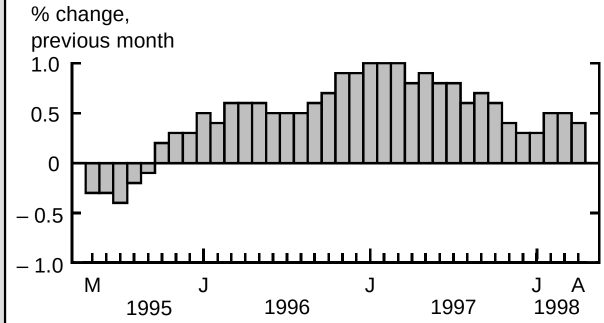
Current trends

Gross domestic product



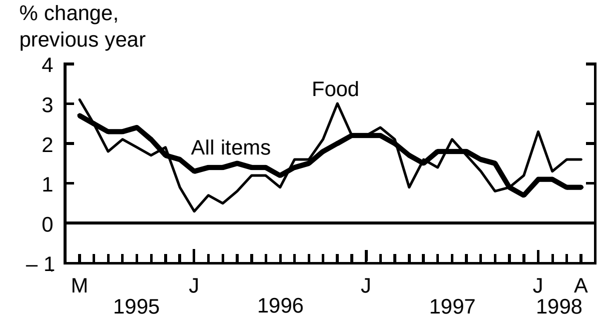
Real gross domestic product at factor cost rebounded 0.9% in February.

Composite Index



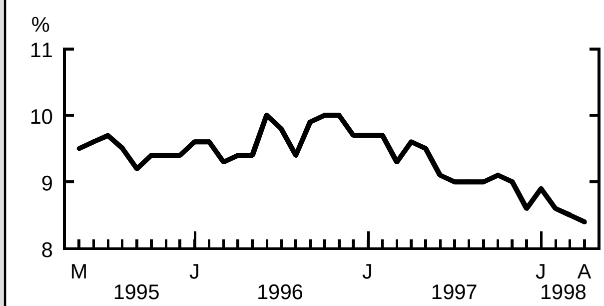
The Composite Index grew by 0.4% in April.

Consumer Price Index



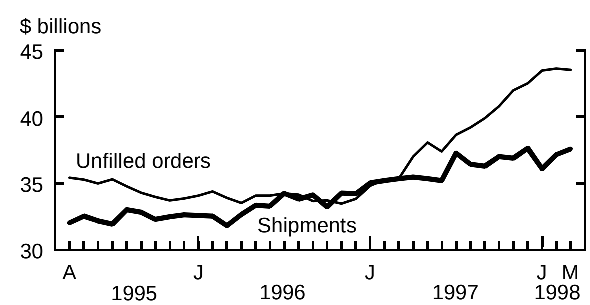
Consumers paid 0.8% more for goods and services in April 1998 than the year before. Food prices rose by 1.7%.

Unemployment rate



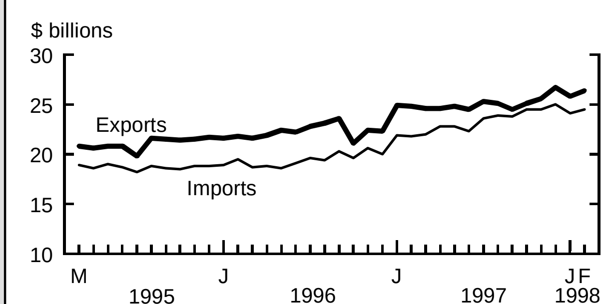
In April, the unemployment rate edged down 0.1 percentage points to 8.4%.

Manufacturing



Manufacturers' shipments rose 0.9% in March to $37.6 billion. The level of unfilled orders increased 0.2% to $43.5 billion.

Merchandise trade



In February, the value of merchandise exports rose 2.2% from January to $26.4 billion. Imports increased 0.9% to $24.5 billion.

Note: *All series are seasonally adjusted except the Consumer Price Index.*

Latest monthly statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product ($ billion, 1992)	February	706.6	0.9%	3.4%
Composite Index (1981=100)	April*	205.2	0.4%	6.8%
Operating profits of enterprises ($ billion)	Q4 1997	29.2	3.1%	16.0%
Capacity utilization (%)	Q4 1997	85.6	0.3†	2.5†
DOMESTIC DEMAND				
Retail trade ($ billion)	February	19.9	0.1%	4.3%
New motor vehicle sales (thousand of units)	March	116.2	5.0%	– 1.8
LABOUR				
Employment (millions)	April	14.3	0.5%	3.2%
Unemployment rate (%)	April	8.4	– 0.1†	– 1.1†
Participation rate (%)	April	65.1	0.2†	0.3†
Labour income ($ billion)	January	37.7	– 0.0%	3.2%
Average weekly earnings ($)	February	609.70	0.5%	2.2%
INTERNATIONAL TRADE				
Merchandise exports ($ billion)	February	26.4	2.2%	6.9%
Merchandise imports ($ billion)	February	24.5	0.9%	12.5%
Merchandise trade balance (all figures in $ billion)	February	1.8	0.3	– 1.0
MANUFACTURING				
Shipments ($ billion)	March*	37.6	0.9%	5.4%
New orders ($ billion)	March*	37.7	0.6%	4.9%
Unfilled orders ($ billion)	March*	43.5	0.2%	21.2%
Inventory/shipments ratio	March*	1.28	– 0.02	– 0.01
PRICES				
Consumer Price Index (1992=100)	April*	108.3	– 0.1%	0.8%
Industrial Product Price Index (1992=100)	March	118.4	– 1.0%	– 0.6%
Raw Materials Price Index (1992=100)	March	110.1	– 2.7%	– 14.8%
New Housing Price Index (1992=100)	March	99.9	0.1	1.0%

Note: *All series are seasonally adjusted with the exception of the price indexes.*
* *new this week*
† *percentage point*

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A weekly review

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Publications released from May 15 to 21, 1998

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription Canada (C$)	Outside Canada (US$)
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS				
Education quarterly review	Winter 1997			
Internet		81-003-XIB	16/51	16/51
Paper		81-003-XPB	21/68	21/68
CURRENT ECONOMIC ANALYSIS				
Canadian economic observer	May 1998	11-010-XPB	23/227	23/227
INDUSTRY MEASURES AND ANALYSIS				
Gross domestic product by industry	February 1998	15-001-XPB	15/145	15/145
INTERNATIONAL TRADE				
Exports by commodity	February 1998			
Microfiche		65-004-XMB	37/361	37/361
Paper		65-004-XPB	78/773	78/773
LABOUR				
Employment earnings and hours	February 1998	72-002-XPB	32/320	32/320
MANUFACTURING, CONSTRUCTION AND ENERGY				
Construction type plywood, Vol. 46, no. 3	March 1998	35-001-XPB	7/62	7/62
Electric lamps (light bulbs and tubes)	March 1998	43-009-XPB	7/62	7/62
Footwear statistics, Vol. 73, no. 1	Q1 1998	33-002-XPB	8/25	8/25
Industrial chemicals and synthetic resins, Vol . 41, no. 3	March 1998	46-002-XPB	7/62	7/62
Oil pipeline transport	February 1998	55-001-XPB	12/114	12/114
Particleboard, oriented strandboard and fibreboard, Vol. 34, no. 3	March 1998	36-003-XPB	7/62	7/62
Primary iron and steel	March 1998	41-001-XPB	7/62	7/62
Refined petroleum products	February 1998	45-004-XPB	21/206	21/206
Shipments of plastic film and bags manufactured from resin, Vol. 16, no. 1	Q1 1998	47-007-XPB	10/33	10/33
Steel wire and specified wire products	March 1998	41-006-XPB	7/62	7/62
TRANSPORTATION				
Railway carloadings	March 1998	52-001-XPB	11/103	11/103

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