



Infomat

A Weekly Review

Friday, August 18, 2000

OVERVIEW

◆ **Growth rate of average wages doubles**

By the hour or by the week, annual average wages in 1999 increased at about double their 1998 pace.

◆ **Incomes and income inequality in the United States rising more rapidly than in Canada**

Real incomes are higher and have been growing considerably faster in the United States on average. At the same time, income inequality is higher in the United States, and it has also been rising more rapidly.

◆ **Large retailers' sales increase**

Large retailers' sales in May rose 1.8% from May 1999. May marked the second consecutive month since January 1998 that health and personal care products posted just single-digit sales growth.

◆ **New truck sales rebound**

In June, increased sales of new trucks lifted new motor vehicle sales 3.6%. The rise followed two consecutive months of decline. New car sales were down, however, for a third straight month.

◆ **Retailers are the major clients of publishers and exclusive agents**

In 1998/99, Canadian book publishers and exclusive agents made 55% of their domestic sales directly to the retail sector, 22% to the institutional sector and 11% to wholesalers.

◆ **One in 10 private-sector firms is selling over the Internet**

Last year, one out of 10 companies used the Internet to sell goods and services, and these sales amounted to just 0.2% of their total economic activity. However, a greater proportion of firms used the Internet to purchase goods and services.

Growth rate of average wages doubles

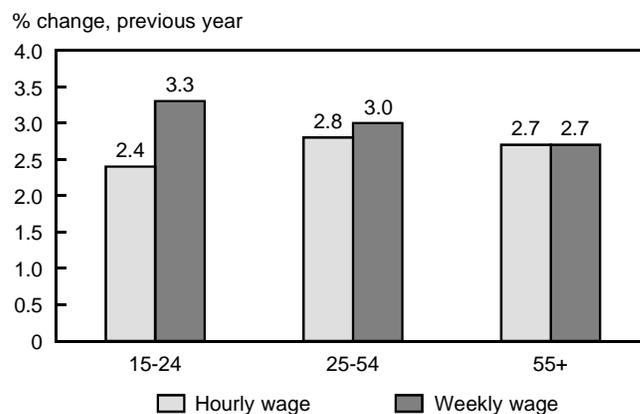
By the hour or by the week, annual average wages in 1999 increased at about double their 1998 pace, according to the Labour Force Survey. During 1999, the 12 million employees in Canada earned an average \$16.14 an hour, or \$595.62 a week. The average hourly wage increased by 39 cents or 2.5% from 1998—just over double the 1.2% increase from 1997. The average weekly wage rose \$15.73 or 2.7%, compared with 1.4% in 1998.

The increase in average weekly wages was somewhat more than the increase in hourly wages because employees in 1999 worked slightly longer hours on average than they did in 1998. Both increases exceeded the average 1.7% rise in the Consumer Price Index (CPI) in 1999. This means that real hourly average wages, adjusted for growth in the CPI, rose 0.8%, while real weekly average wages increased 1.0%.

Average hourly wages increased most (+2.8%) among core-age workers (those aged 25 to 54). However, growth in average weekly wages was strongest among young people aged 15 to 24 (+3.3%).

Hourly wages rose faster for men than for women. Women earned an average of \$14.38 an hour in 1999, up 2.3% from 1998.

Wage growth by age group, 1999



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... Growth rate of average wages doubles

Men made an average of \$17.77 an hour, 2.7% higher than in 1998. However, because the number of work hours increased for women and declined for men, average weekly wages increased at a faster rate for women (+2.9% vs. +2.6%). Weekly salaries for women averaged \$484.52 in 1999, compared with \$698.53 for men. In other words, for a third straight year, women made 81 cents for every dollar earned by men.

Employees in Ontario made an average of \$633.05 a week in 1999, highest among the provinces. At \$625.22, British Columbia was the only other province in which the average wage was higher than the national average. Average weekly wages were lowest in the four Atlantic provinces.

Hourly wages showed the strongest growth in Alberta (+4.0%). Weekly wages increased fastest in both Alberta and Ontario (+3.6%).

The vol. 4, no. 2 edition of Labour force update (71-005-XPB, \$29/\$96) presents the details. For more information, contact Geoff Bowlby (613-951-3325; fax: 613-951-2869), Labour Statistics Division.

Average wage rates, 1999

	Hourly	1998 to 1999	Weekly	1998 to 1999
	\$	% change	\$	% change
Canada	16.14	2.5	595.62	2.7
Newfoundland	13.02	0.3	496.79	1.1
Prince Edward Island	12.23	2.6	462.02	3.6
Nova Scotia	13.41	1.6	503.35	1.8
New Brunswick	13.30	1.6	504.70	1.7
Quebec	15.70	1.6	565.83	1.8
Ontario	16.98	3.2	633.05	3.6
Manitoba	14.44	3.1	530.97	3.0
Saskatchewan	14.17	3.4	524.90	3.3
Alberta	15.75	4.0	593.60	3.6
British Columbia	17.26	0.9	625.22	1.1

Incomes and income inequality in the United States rising more rapidly than in Canada

Income distribution patterns in Canada and the United States have diverged during the past 10 years despite free trade and increased economic integration between the two nations, according to a new study. Real incomes are higher and have been growing considerably faster in the United States on average. At the same time, income inequality is higher in the United States, and it has been rising more rapidly. In fact, inequality (the gap between rich and poor) and polarization (decline in the middle class) of family disposable income in Canada has remained roughly stable since the mid-1970s.

As well, Canadian families in the bottom 25% of the income spectrum were better off in terms of purchasing power in 1997 than their American counterparts. But at the top, the income gap between Canadian and American families has widened. In the top one-fifth of the income distribution, American families had disposable incomes more than 20% higher in 1997 than their Canadian counterparts (\$61,400 compared with \$50,800). Moreover, in the top one-tenth, disposable incomes among American families were about 25% higher.

Government transfer programs have had a substantial equalizing impact on family income distributions on both sides of the border. Interestingly, between 1974 and 1985, the American transfer system appeared more redistributive than Canada's. However, between 1985 and 1997, government transfer programs in Canada generally had larger impacts.

Individual income and payroll taxes have also had an equalizing impact on the distribution of family income on both sides of the border. This effect was somewhat larger in Canada. In both

Note to readers

The study, "Income inequality in North America: Does the 49th parallel still matter?", explores patterns of change between 1974 and 1997 in average earnings and income distribution in Canada and the United States. It also investigates these patterns on the basis of broad geographic regions within both countries.

The study rejects the theory that increasing economic integration has led to greater similarity in patterns of income distribution in the two countries. Rather, the results suggest a widespread difference in overall income distribution in both Canada and the United States. If anything, the differences appear to be widening, at least up to 1997.

countries, income taxes have had considerably weaker equalizing impacts than income transfers have.

In 1997, American workers averaged about \$36,500 in earnings—29.2% more than the Canadian average of \$28,300. The gap in average earnings between the two countries was largest for workers at the top of the earnings distribution. (The figures are expressed in 1995 Canadian dollars using purchasing power parities. Workers include full-time and part-time employees, as well as the self-employed.) These 1997 averages followed a period of growth between 1985 and 1997 of 14.6% in the United States and 5.9% in Canada.

Over the same period, the two countries' growth rates for median earnings were much closer than those for average earnings. From 1985 to 1997, median earnings increased in the United States by 8.7%, compared with 7.7% in Canada. In 1997, the median earnings of American workers were \$27,500, compared with the Canadian median of \$24,200. The earnings difference between the two countries at the median was 13.6%, smaller than the 29.2% gap in average earnings.

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... Incomes and income inequality in the United States rising more rapidly than in Canada

Between 1974 and 1985, earnings inequality and polarization increased in both countries. These changes were more pronounced in Canada than in the United States. However, between 1985 and 1997, these trends were completely reversed in Canada, where the earnings gap narrowed and polarization declined. In the United States, earnings inequality continued to increase, but polarization

declined, signalling a reversal of the “disappearing middle-class jobs” phenomenon first noted over a decade ago.

The feature article “Income inequality in North America: Does the 49th parallel still matter?” appears in the August 2000 issue of Canadian economic observer (11-010-XPB, \$23/\$227), which is now on sale. For more information, contact Michael Wolfson, (613-951-8216), Analysis and Development Group.

Large retailers' sales increase

Large retailers' sales in May reached \$6.2 billion, up 1.8% from May 1999. May marked the second consecutive month since January 1998 that health and personal care products posted just single-digit sales growth (+8.1%). The three commodity categories with the largest sales growth were health and personal care products, home furnishings and electronics, and “all other goods and services”.

The “all other goods and services” category benefited from robust sales of automotive fuels, oils and additives (+30.7% to \$122.3 million), as well as from strong sales of tobacco products and supplies (+11.7% to \$184.6 million). Higher prices at the pump boosted gasoline sales figures, while anticipation of a tax increase lifted consumer demand for tobacco products and supplies.

Within the home furnishings and electronics category, sales of home electronics continued to do well (+16.5%), as they outpaced sales of household appliances (+12.2%), indoor furniture (+6.0%) and home furnishings (+3.5%). Home furnishings include floor coverings, bedding, artwork and window treatments.

Within health and personal care products, prescription and over-the-counter drug sales climbed strongly (+17.3%), whereas sales of cosmetics, fragrances and other personal care products only just edged up (+1.1%).

Sales in the food and beverage category fell 4.0% and sales of clothing, footwear and accessories category declined 3.4%. Between May 1999 and May 2000, the share of food and beverages sold by large retailers dropped from 35% to 33%. Their share of clothing, footwear and accessories sales decreased from 20% to 19%.

Note to readers

The composition of the surveyed group of large retailers changed in 1999. This especially affects the comparisons of sales in the food sector, where several supermarket chains restructured. All comparisons in this article are year-over-year and all data are unadjusted for seasonal factors.

Large retailers' sales

Not seasonally adjusted

	May 1999	May 2000	May 1999 to May 2000 % change
	\$ millions		
All commodities	6,112	6,219	1.8
Food and beverages	2,151	2,065	-4.0
Clothing, footwear and accessories	1,243	1,201	-3.4
Home furnishings and electronics	696	769	10.5
Health and personal care products	438	474	8.1
Housewares	265	276	4.3
Sporting and leisure goods	270	277	2.5
Hardware, lawn and garden products	449	476	5.9
All other goods and services	598	681	13.8

To order data, or for general information, contact Client Services (613-951-3549 or 1 877 421-3067; retailinfo@statcan.ca). For further analytical information, contact Catherine Draper (613-951-0669; drapcat@statcan.ca), Distributive Trades Division.

New truck sales rebound

After two consecutive monthly declines, new motor vehicle sales advanced in June by 3.6%. The number of new vehicles sold rose to 133,898, an increase of 4,593 vehicles over May. This advance, which returned sales almost back to their March level, was only the second monthly sales gain since the start of the year.

June sales of new vehicles were pulled up by truck sales, which rebounded 9.5% to 66,540 trucks. This increase, which followed two straight monthly declines, lifted the number of

trucks sold to its highest level since December 1997. Part of the increase was stimulated by the automakers' attractive financial incentives, which included low-interest and even no-interest financing. Despite the sizeable gain in June, new truck sales have remained almost unchanged since the summer of 1999.

As for new cars, the number sold in June decreased 1.7% from May, down to 67,358 cars. It was the third decrease in as many months and the fifth in the first six months of 2000. The slow sales of new cars can be largely ascribed to North American-built cars, sales of which have declined for five months since the start of the year. In June, 50,531 North American-built cars were sold,

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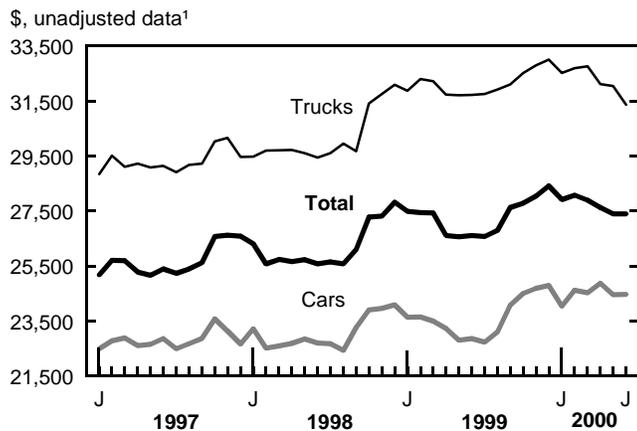
... New truck sales rebound

a drop of 19.3% from the peak in December 1999. By contrast, imported car sales (16,827 were sold in June) have only declined 2.0% from last December's peak.

Consumers in June spent an average of \$31,370 (unadjusted figures) for a light truck. This was down 5.0% from the peak in December 1999. The higher gasoline prices might have induced manufacturers to lower the price of trucks to stimulate demand. In June, new cars were selling at an average price of \$24,470, down 1.3%.

Looking at the provinces, dealers in Newfoundland posted the largest monthly sales growth in June (+22.1% to 2,075 new vehicles). However, this gain followed a 17.5% drop in May. The

Average selling price for new motor vehicles



¹ These data do not include most heavy trucks, coaches and buses.

Note to readers

Cars include those used for personal and commercial purposes (such as taxis or rental cars). Trucks include minivans, sport-utility vehicles, light and heavy trucks, vans, coaches and buses.

New vehicles built in North America include those made or assembled in Canada, the United States or Mexico. All other new vehicles are considered imports (manufactured overseas).

For reasons of confidentiality, data for the Yukon, the Northwest Territories and Nunavut are included with the British Columbia data. Unless otherwise noted, all data are seasonally adjusted.

June increase helped to stabilise new vehicle sales in the province. By contrast, dealers in the region formed by British Columbia, the Yukon, the Northwest Territories and Nunavut recorded the biggest drop in new vehicle sales (-9.5%). Despite this decline, sales in the region have been generally rising since the summer of 1998.

In the second quarter of this year, new vehicle sales advanced 0.7% from the first quarter. This gain, which occurred despite slack sales in April and May, followed a 3.0% decrease in the first quarter. Compared with the second quarter of 1999, new vehicle sales were up 5.2%. New car sales in the second quarter were down from the first quarter by 0.8%, but were 7.2% higher than in the year-earlier quarter. Truck sales in the second quarter advanced 2.3% over the previous quarter, and were 3.2% higher than in the second quarter of 1999.

The June 2000 issue of New motor vehicle sales (online at www.statcan.ca: 63-007-XIB, \$13/\$124) presents the full report. To order data, or for general information, contact Client Services (613-951-3549, 1 877 421-3067, retailinfo@statcan.ca). For analytical information, contact Clérance Kimanyi (613-951-6363, kimacle@statcan.ca), Distributive Trades Division.

Retailers are the major clients of publishers and exclusive agents

In 1998/99, Canadian book publishers and exclusive agents made 55% of their domestic sales directly to the retail sector, 22% to the institutional sector and 11% to wholesalers.

Sales directly to retailers amounted to \$925 million. Of that total, purchases by national chain bookstores accounted for 31%, while independent bookstores accounted for 27%. Campus bookstores, the third major retail client, purchased 20%.

Within the direct-to-retail market, national chains accounted for 37% of sales by English-language publishers and exclusive agents, compared with only 12% for French-language firms. However, sales to warehouse clubs represented only 5% of the retail sales of English-language firms—half the market share that these clubs represented for French-language firms.

The industry reported total revenues of \$2.2 billion in 1998/99, including \$133 million in direct exports and \$43 million in grants

Note to readers

The Survey of Book Publishers and Exclusive Agents is a census of all book publishers and exclusive agents in Canada. The 1998/99 survey covered 643 publishers (including those also acting as exclusive agents), and 57 firms solely functioning as exclusive agents. Data for the territories are not reported because of confidentiality restrictions.

recognized as revenues. Overall, publishers and exclusive agents generated a pre-tax profit of \$137 million, or 6% of revenues. However, only three-fifths of these firms operated above the break-even point.

In 1998/99, Canadian-controlled publishers and exclusive agents generated \$1.5 billion in revenues, accounting for 63% of total revenues. Their profit margin was 6% of total revenues, compared with 7% for foreign-controlled firms.

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... Retailers are the major clients of publishers and exclusive agents

The U.S. market accounted for almost two-thirds (63%) of publishers' export revenues. For English-language publishers, 71% of their export revenues were earned in the United States, followed by South and Central America and the United Kingdom. For French-language publishers, France accounted for 57% of export sales and the United States 21%.

Book publishers produced 14,439 new titles in 1998/99, and reprinted 10,262 existing titles. Three-quarters of new and reprinted titles were Canadian-authored. Of new and reprinted textbooks, 92% were Canadian-authored, whereas only 13% of mass market paperbacks were by Canadian writers.

Year-over-year comparisons of sales show the increasing importance of bookstore chains to Canada's English-language publishers and exclusive agents. From 1996/97 to 1998/99, their sales to this client group climbed 24%. Sales to campus bookstores grew 21%, whereas sales to independents fell 10%.

French-language publishers and exclusive agents experienced no real sales growth. However, their client mix did vary: sales volume increased to chain bookstores, whereas it decreased to accredited bookstores and other independents.

*Selected information from the Survey of Book Publishers and Exclusive Agents is now available in table format (87F0004XPE, \$50). These tables include data by province, language of publisher and country of control. Custom tabulations are available on a cost-recovery basis. A summary of the data up to 1996/97 appears in **Canada's culture, heritage and identity: A statistical perspective** (87-211-XPB, \$31). To order standard or custom tabulations, or for further information, contact David Coish (613-951-3028; coisdav@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

Book publishers' and exclusive agents' sales in Canada, 1998/99

	Language of publisher and exclusive agent		
	English	French	Total
	\$ millions		
Total sales	1,352	334	1,687
Retail sector	728	196	925
Chain bookstores	267	23	290
Independents	134	112	247
Accredited bookstores (Quebec)	3	95	98
Other	131	17	148
Campus bookstores	165	22	187
Department stores	16	11	27
Mail order and book clubs	73	4	77
Warehouse clubs and discount stores	35	19	55
Internet retailers	2	0	2
Other retail	36	5	40
Wholesale sector	131	61	193
Institutional sector	305	63	368
Government and special libraries	29	1	30
Public libraries	23	1	24
Elementary/secondary schools	167	54	222
Postsecondary schools	70	6	76
Other institutions	16	1	17
Other	187	13	201
Direct to general public	126	8	134
Other	61	5	67

One in 10 private-sector firms is selling over the Internet

A majority of Canadian businesses has embraced the use of technologies such as e-mail and the Internet. Last year, one out of 10 companies used the Internet to sell goods and services. However, a greater proportion of businesses used the Internet to buy goods and services rather than to sell.

In 1999, the value of customer orders received over the Internet totalled \$4.4 billion. Of this total, \$4.2 billion was generated by the private sector. This amount represents only 0.2% of the private sector's total economic activity, measured as total operating revenues. In fact, in no industrial grouping were estimated Internet sales higher than 1.5% of that grouping's total sales. The highest share was seen in accommodation and food services (1.3%), followed by information and cultural industries (1.0%) and professional, scientific and technical services (0.8%).

Manufacturers made the largest amount in the private sector through Internet sales. In 1999, they received orders via the Internet worth just over \$900.0 million, about 22% of the private sector's Internet-based sales and just 0.2% of manufacturing

Note to readers

The new Information and Communications Technologies and Electronic Commerce Survey provides the first set of comprehensive data on the extent of computer use, of Internet use and the availability of Web sites in the private and public sectors. The survey also provides comparable information on the magnitude of e-commerce across industry sectors (except construction, local governments, and production of crops and animals, fishing, hunting and trapping). E-commerce is defined as Internet-based commercial transactions, with or without on-line payment. The survey was conducted from October 1999 to March 2000 and collected information for 1999. About 23,000 firms received the questionnaire.

shipments in 1999. Retailers ranked second, with Internet sales worth \$610.6 million, or 15% of total Internet sales. That amount represented 0.2% of total retail sales in 1999. By comparison, in the fourth quarter of 1999, U.S. retailers' Internet-based sales totalled US\$5.2 billion, or 0.6% of total U.S. retail sales for that quarter.

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... One in 10 private-sector firms is selling over the Internet

The proportion of private-sector businesses offering goods and services over the Internet stood at 10% in 1999. These enterprises accounted for 17% of the sector's economic activity. Leading the way last year were information and cultural industries, where 20% of businesses used the Internet to sell goods and services. In the public sector, 14.5% of institutions used the Internet to sell goods or services.

On average, a greater proportion of businesses used the Internet to buy goods and services rather than to sell. In the private sector, 14% of businesses used the Internet for purchasing; these firms accounted for 25% of total operating revenues. Again, ranking first were the information and cultural industries. In the public sector, 44% of institutions used the Internet to purchase goods and services. By contrast, three industries reported a significantly greater use of the Internet to sell rather than to purchase goods: accommodation and food services, administration and support services, and finance and insurance.

In 1999, Internet access was more than twice as common among public-sector employees than among private-sector employees (59% vs. 28%). Within public educational services, 90% of employees had access to the Internet, while 82% of federal and provincial government employees had access. In the private sector, 74% of employees in the information and cultural industries had access, followed by those in private educational services (66%) and in professional, scientific and technical services (60%). By contrast, 13% of employees in retail trade had access to the Internet and 7% had access in accommodation and food services.

A working paper tabulating results from key questions in the survey will be released shortly. For more information, contact Cathy Bakker (613-951-2929), Science, Innovation and Electronic Information Division.

Use of the Internet to purchase and sell and Web presence, 1999

	Use of the Internet	Use of the Internet to purchase goods or services	Use of the Internet to sell goods and services	Web site
	% of enterprises			
All private sector	52.8	13.8	10.1	21.7
Forestry, logging and support activities	32.8	7.4	1.1	5.7
Mining and oil and gas extraction	60.6	19.3	7.1	27.6
Utilities	82.4	24.7	9.2	27.3
Manufacturing	63.7	18.9	14.9	31.7
Wholesale trade	63.0	13.9	13.6	26.1
Retail trade	40.5	10.8	10.9	16.0
Transport and warehousing	43.8	10.7	10.1	17.6
Information and cultural industries	89.1	49.6	20.1	61.7
Finance and insurance	65.9	12.7	14.7	27.2
Real estate and rental and leasing	46.3	8.2	9.5	18.4
Professional, scientific and technical services	77.5	30.0	11.5	27.6
Management of companies and enterprises	47.0	12.9	8.0	9.9
Administration and support, waste management and remediation services	55.4	13.4	17.3	29.5
Private educational services	74.5	27.2	17.3	44.0
Private health care and social assistance	46.2	9.5	3.1	10.0
Arts, entertainment and recreation	51.0	12.1	10.1	29.7
Accommodation and food services	32.0	3.9	7.9	17.4
Other services, except public administration	44.5	6.5	3.7	19.3
All public sector	95.4	44.2	14.5	69.2
Public educational services	99.2	60.6	32.2	97.6
Public health care and social assistance	92.8	34.7	3.1	50.0
Public administration	98.0	50.7	24.7	87.8

New from Statistics Canada

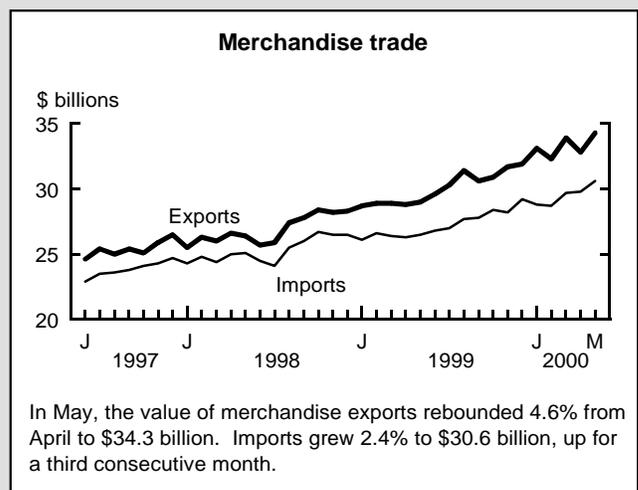
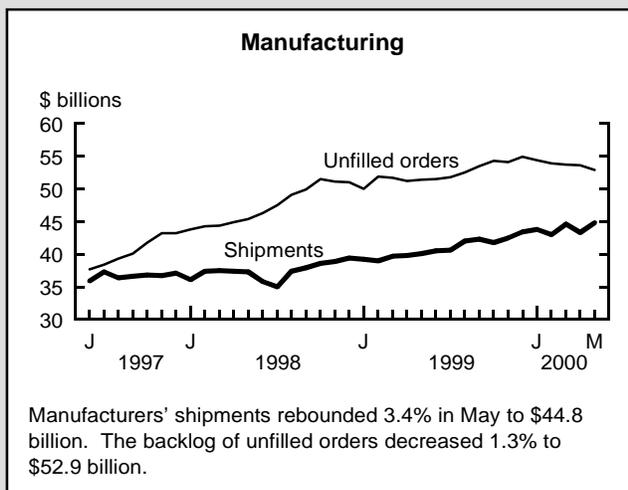
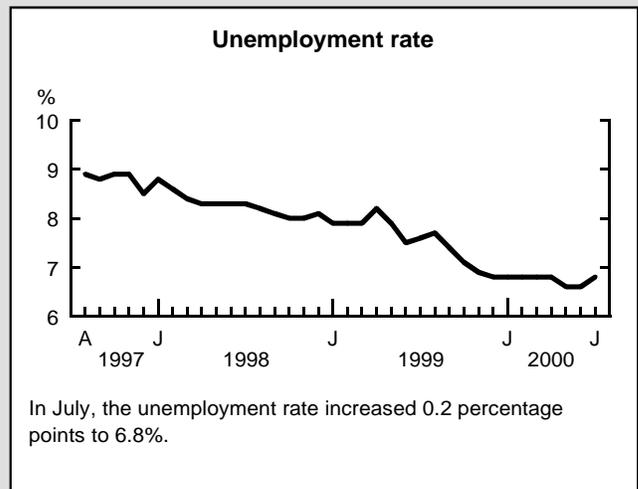
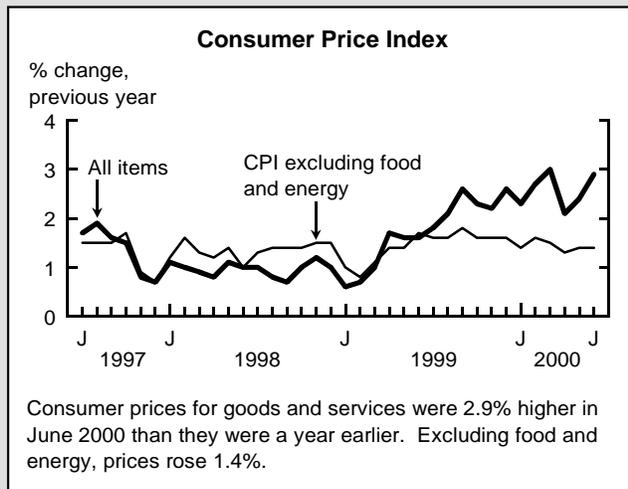
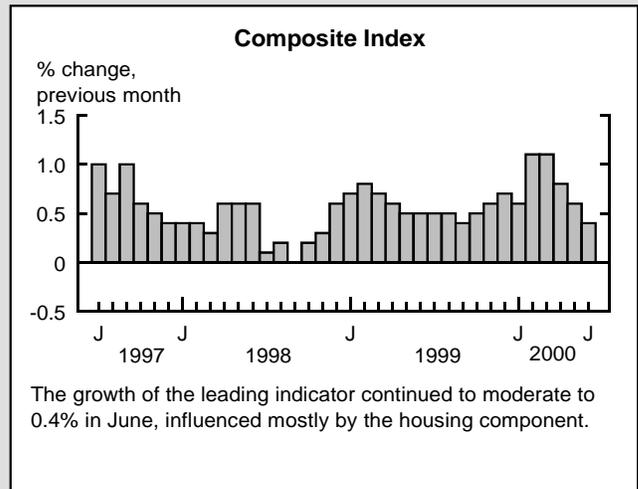
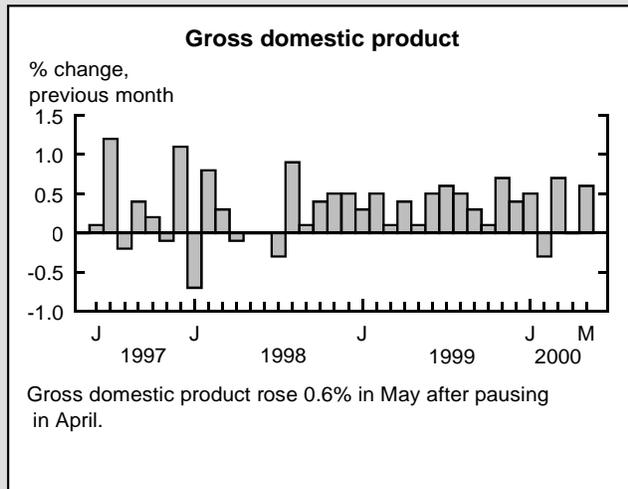
Education resources Web site

The interactive *Education resources Web site*, part of Statistics Canada's corporate Web site, has three entry points to serve different audiences. Secondary students are connected to Canadian content for their assignments, elementary and secondary school teachers will find information and teaching aids relevant to their courses, and post-secondary users are linked to sources for in-depth research. On-line support includes an e-mail information line for students called "Ask an expert" and a discussion forum for teachers.

Using the theme search function, students can locate information on virtually every school subject at every level. They also gain valuable skills in information technology as they navigate the site. Teachers pressed for time can easily find lesson plans and teachers' kits. They can also get hands-on assistance and training on the site's resources from Statistics Canada's education representatives.

*To access the **Education resources Web site**, visit Statistics Canada online at www.statcan.ca/english/edu. For further information, contact Mary Townsend, (613-951-6443, mary.townsend@statcan.ca), or contact the education representative at a Statistics Canada Regional Reference Centre.*

Current trends



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

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product (\$ billion, 1992)	May	779.9	0.6%	4.8%
Composite Index (1992=100)	July*	163.8	0.4%	8.0%
Operating profits of enterprises (\$ billion)	Q1 2000	53.3	12.3%	37.5%
Capacity utilization (%)	Q1 2000	87.6	1.1†	4.3†
DOMESTIC DEMAND				
Retail trade (\$ billion)	May	22.7	0.4%	6.2%
Department store sales (\$ billions)	June	1.52	1.5%	2.4%
New motor vehicle sales (thousand of units)	June*	133.9	3.6%	7.5%
Wholesale trade (\$ billion)	May	31.9	1.3%	8.5%
LABOUR				
Employment (millions)	July	14.87	-0.1%	2.3%
Unemployment rate (%)	July	6.8	0.2†	-0.8†
Participation rate (%)	July	65.6	-0.1†	0.0†
Average weekly earnings (\$)	May	625.43	0.3%	2.6%
Help-wanted Index (1996=100)	July	171	1.2%	6.9%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	May	34.3	4.6%	18.4%
Merchandise imports (\$ billion)	May	30.6	2.4%	15.3%
Merchandise trade balance (all figures in \$ billion)	May	3.7	0.8	1.3
MANUFACTURING				
Shipments (\$ billion)	June*	45.1	0.7%	11.4%
New orders (\$ billion)	June*	45.5	3.0%	12.2%
Unfilled orders (\$ billion)	June*	53.6	0.6%	4.1%
Inventory/shipments ratio	June*	1.30	-0.01	0.01
PRICES				
Consumer Price Index (1992=100)	June	113.7	0.6%	2.9%
Industrial Product Price Index (1992=100)	June	127.3	0.0%	5.5%
Raw Materials Price Index (1992=100)	June	144.8	2.1%	28.3%
New Housing Price Index (1992=100)	June*	103.0	0.0%	2.4%

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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