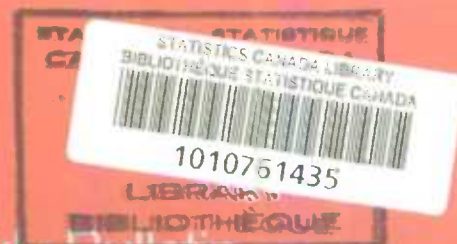




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Weekly Bulletin



December 10, 1982

## Department Store Sales

Department store sales in Canada dropped to \$859.1 million in October 1982, down 3.7% from the year-earlier level. For the first 10 months of 1982, department store sales were \$7,524.5 million, down 1.5% from the January-October 1981 total.

Department store sales by regions in the latest month were as follows, with percentage changes from October 1981 in brackets:

- Ontario, \$302.7 million (-3.2%)
- Quebec, \$154.6 million (-3.0%)
- British Columbia, \$145.3 million (-6.3%)
- Alberta, \$127.3 million (-8.7%)
- Atlantic provinces, \$59.3 million (+7.5%)
- Manitoba, \$44.3 million (-2.6%)
- Saskatchewan, \$25.7 million (+0.4%).

Data users should note that the figures for British Columbia include as well those for the Yukon and Northwest Territories. See the October 1982 issue of Department Store Sales by Regions (63-004, \$1.50/\$15).

## Gross National Product

Preliminary estimates indicate that in the third quarter of 1982 Gross National Product at market prices rose 1.9% to a level of \$349.9 billion, seasonally adjusted at annual rates. After allowing for a 2.9% increase in overall prices (2.1%, if the distorting effect of implicit inventory prices is excluded), real GNP declined 1.0%.

The drop in output was less than in either of the last two quarters. The improvement relative to the second quarter was mainly due to three factors: reduced purchases of services from abroad that were not matched by a reduction of expenditure in Canada, a slower rate of disinvestment in business inventories and smaller declines in non-residential construction activity. Real exports rose much less strongly in the third quarter than in the second, real personal expenditure declined a little more rapidly and investment in machinery and equipment fell more sharply. On balance, the structure of demand in the third quarter would not yet seem to provide a firm basis for recovery.

The drop in personal expenditure on goods and services was 1.0% in real terms in the third quarter and was spread through all durability classes and services. Personal expenditure accounts for nearly two-thirds

(continued on next page)

## LATEST MONTHLY STATISTICS

### EMPLOYMENT, INCOME

Average Weekly Earnings (\$)	Aug.	391.26p	391.37p	9.0
Labour Income (\$ million)	Aug.	16,359.0p	16,671.6p	4.0
Persons with Jobs (million)	Nov *	10.36	10.52	-4.5
Unemployed	Nov *	1,438,000	1,388,000	55.0

### INVENTORIES

Department Store (\$ million)	Sept.	2,826.5	2,911.5	1.8
Manufacturers' Owned (\$ million)	Sept.	32,648.0p	33,043.1r	-3.5

### ORDERS

Manufacturers' New Orders (\$ million)	Sept.	15,602.3p	14,617.2r	-5.7
Manufacturers' Unfilled Orders (\$ million)	Sept.	16,995.9p	17,469.3r	-6.6

### PRICES

Consumer Price Index (1971=100)	Oct.	269.2	267.5	10.0
New House Price Index (1976=100)	Oct.	130.2	130.6	-3.1
Raw Materials Price Index (1977=100)	Oct.	200.6p	202.6p	3.1
Excl. coal, crude oil, nat. gas	Oct.	143.8p	147.1p	-4.2
Industry Selling Price Index (1971=100)	Oct.	291.8p	292.3p	4.5

### CONSTRUCTION

Building Permits (\$ million)	Sept.	1,037.6p	9,352.8p	-31.6
Housing Starts — Urban Centres (units)	Oct.	9,099	83,086	-30.1

### ENERGY

Coal Production (thousand tonnes)	Sept.	3,412	32,347	10.4
Electricity Generation (terawatt hours)	Sept.	27.9	276.7	-0.2
Natural Gas Production (million cubic metres)	July	6,869.9	58,131.2	2.0
Petroleum Refining (million cubic metres)	Sept.	7.2p	67.6p	-14.5

### FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Oct *	6,722p	70,316p	1.1
Imports — Balance of Payments Basis (\$ million)	Oct *	5,179p	56,388p	-12.9

### PRODUCTION

Railway Carloadings (million tonnes)	Oct.	16.2p	170.1p	-11.6
Steel (ingots — thousand tonnes)	Sept.	958.0p	9,576.5p	-17.6

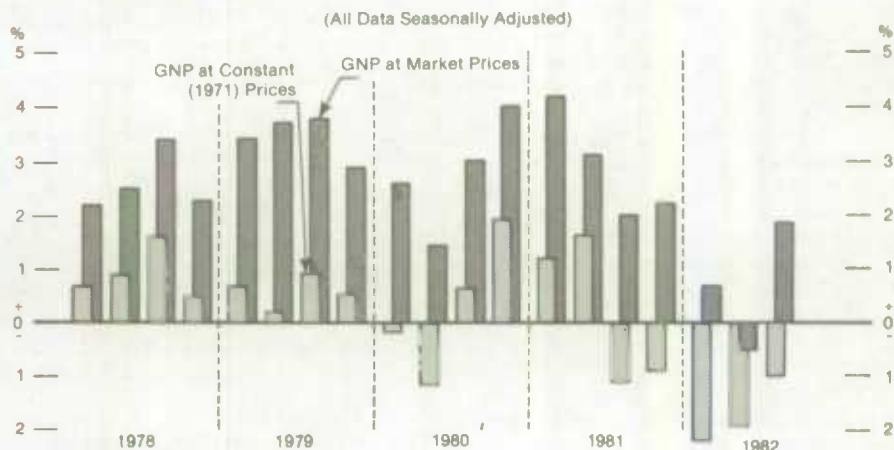
### SALES

Department Store Sales (\$ million)	Oct *	859.1	7,524.5	-1.5
Manufacturers' Shipments (\$ million)	Sept.	16,075.7p	138,079.0p	-2.6
New Motor Vehicle Sales (\$ million)	Sept.	786.2	7,595.7	-17.9
Retail Sales (\$ million)	Sept.	8,122.3p	69,979.6p	3.1

Statistics are in current dollars and are not seasonally adjusted.  
p - preliminary. r - revised. \* - new this week.

## Canada's Gross National Product (GNP)

Quarter-to-Quarter Change



Source: Statistics Canada, National Income and Expenditure Accounts (13-001)

of real GNP, and, while both series have now declined five quarters in a row, personal expenditure has been, as was to be expected, more resistant to recession. Since the peak in the second quarter of 1981, GNP has fallen 6.9% and real personal expenditure 3.9%.

Gross fixed capital formation in real terms also fell for the fifth consecutive quarter. In the third quarter the decline was about 7%, with the business sector down over 8% and government up fractionally. Within business, real expenditure on plant and equipment continued to decline strongly, although, despite strike activity, there was evidence of some firming in non-residential construction, particularly in the oil industry.

New housing construction was down 15.5% in the third quarter after falling 13% in the second quarter. There was some recovery in the resale markets, however, where real estate commissions rose sharply.

Non-farm businesses cut inventories by \$3.1 billion in the third quarter; this reduction was \$328 million less than in the second quarter. Stock-to-sales ratios in manufacturing generally remained high compared to levels prevailing at the onset of the recession.

The volume of merchandise exports rose nearly 2% in the third quarter but this was down sharply from the irregularly high 7.5% rate of growth in the second, mainly because of slower exports of grains, lumber, metals and motor vehicle products. The current dollar surplus on trade in goods and services rose by \$2.2 billion, however, as a \$2.5 billion rise in the value of merchandise imports was largely offset by the \$2.1 billion fall in non-merchandise imports noted earlier.

The implicit price index of GNE rose 2.9% in the third quarter compared to 1.5% in the second. This should not be taken to indicate a speeding up of overall inflation since the acceleration was entirely attributable to a changing pattern of weights within inventories, as has happened frequently in the past.

Total wages, salaries and supplementary labour income were virtually unchanged in the quarter, as the growth in nominal labour income has slowed markedly from the peak quarterly rate of increase of about 4.0% before the recession. The further slowdown during the summer reflected unbroken declines in employment together with a marked easing of hourly earnings.

Corporation profits before taxes rose fractionally in the quarter, but remained 32.5% below the third quarter 1981 level. This is a substantially stronger performance than in the second quarter when a decline of more than 12% from the first quarter was recorded.

Total government expenditures excluding intergovernmental transfers rose 5.6% and comparable revenues rose 4.5%. The deficit of all levels of government combined rose from \$16.9 billion in the second quarter to \$19.5 billion in the third.

*For further information, order the third quarter 1982 issue of National Income and Expenditure Accounts (13-001, \$6/\$24), or contact the Gross National Product Division (613-995-0601).*

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## Canadian Travel Survey

Canadian Travel Survey results for the first quarter of the year 1982 show that Canadians travelling within this country took an estimated 21.2 million person-trips of 50 miles or more from home. This represents a drop of 2.8% from the same quarter in 1981.

In the first quarter of 1982, the automobile was again the primary means of transportation (86% of all person-trips), while visiting friends and relatives was still the most common reason for travel at 34%, followed closely by pleasure at 29%.

*For further information, contact the Travel, Tourism and Recreation Section (613-995-9689), Statistics Canada, Ottawa K1A 0Z5.*

## International Travel

Total non-resident visitors to Canada numbered 2.5 million in October 1982, down 7.7% from a year earlier. Residents of Canada re-entering this country from international trips increased by 6.2% to 2.8 million.

Preliminary statistics for October show that 2.4 million United States residents entered Canada, down 7.6% from a year earlier. Visitors from countries other than the U.S. declined by 9.6% to 126,000. Canadians returning from the U.S. numbered 2.7 million, 6.3% above October 1981, while residents returning from other countries increased by 3.4% to 109,000.

During the first 10 months of 1982, 29.0 million U.S. residents entered Canada, down 19.4% from January-October 1981. Visitors from countries other than the U.S. decreased by 7.3% to 1.8 million.

*For further information, order the October 1982 issue of International Travel — Advance Information (66-002, \$1.50/\$15).*

## Telephone Statistics

Canada's 13 major telephone systems reported revenues of \$668.9 million in October 1982, up 7.0% from a year earlier. Operating expenses increased 6.2% to \$446.7 million. Net operating revenue at \$222.2 million showed an increase of 8.9% over October 1981.

*For further information, order the October 1982 issue of Telephone Statistics (56-002, \$1.50/\$15).*

## Labour Force Survey

Canada's seasonally adjusted unemployment rate remained at the record level of 12.7% in November 1982, unchanged from October. The participation rate decreased to 63.8% from 64.2% in the preceding month and the employment/population ratio fell to 55.7% from 56.0%.

For the week ending November 13, 1982, the seasonally adjusted level of employment was 10,395,000, down 55,000 from October. The employment decline was concentrated among persons 25 years of age and over, with an estimated decrease of 31,000 for males and 17,000 for females. In manufacturing, employment dropped by a further 33,000, bringing the total decline in that sector to over 300,000 since the employment level began to decrease in the fall of 1981. On a provincial basis, employment declined in Ontario (-19,000), British Columbia (-9,000), Alberta (-6,000) and Manitoba (-5,000).

Seasonally adjusted, unemployment was estimated at 1,517,000 in November 1982, little changed from October. The estimated level was up by 16,000 for females 25 years and over, while it decreased by 14,000 for males 15 to 24. Provincially, unemployment rose in Ontario (+32,000), Alberta (+8,000) and Manitoba (+5,000), while a decline of 36,000 was recorded in Quebec (much of this decline is attributable to sampling factors rather than to significant changes in labour market conditions).

Seasonally adjusted unemployment rates for the provinces in November were as follows, with October rates in brackets: Newfoundland, 18.8% (19.2%); Prince Edward Island, 13.2% (12.7%); Nova Scotia, 14.1% (13.5%); New Brunswick, 15.2% (14.8%); Quebec, 14.4% (15.4%); Ontario, 12.4% (11.7%); Manitoba, 10.6% (9.6%); Saskatchewan, 7.1% (6.7%); Alberta, 9.8% (9.1%); and British Columbia, 14.3% (14.2%).

The unadjusted employment level for Canada was estimated at 10,359,000 in November 1982, down 492,000 (-4.5%) from a year earlier. Unemployment climbed 55.0% to 1,438,000 from 928,000 over the 12-month period. The unemployment rate at 12.2% was up from 7.9% in November 1981, the participation rate decreased to 63.2% from 64.0% and the employment/population ratio dropped to 55.5% from 59.0%.

*For further information, order the November 1982 issue of The Labour Force (71-001, \$3.50/\$35).*

## Urban Transit

Canadian urban transit systems (59) collected 113,873,978 initial passenger fares in October 1982. The total distance run was 58 039 781 kilometres and operating revenues amounted to \$59.4 million.

*For further information, order the October 1982 issue of Urban Transit (53-003, \$1.50/\$15).*



## Balance of Payments

Current account transactions in the third quarter of 1982 produced a record surplus for Canada of \$1,020 million on a seasonally adjusted basis, twice the level of the previous quarter.

The record surplus in the July-September 1982 period resulted from a substantial decline in payments on services. The surplus on merchandise trade remained at about the same record level as in the previous quarter.

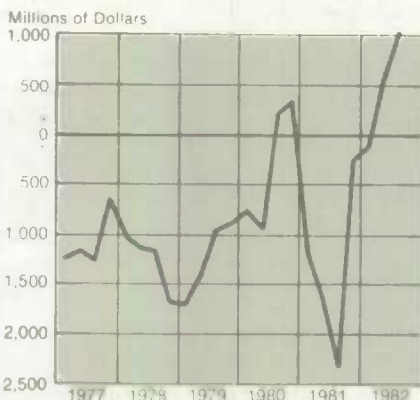
In the capital account, a large inflow resulted from new bonds issued abroad as Canadian borrowers reacted to an easing of monetary conditions originating in the United States. After touching a record low in June 1982, the Canadian dollar strengthened throughout the quarter. The monetary authorities were therefore able to acquire a substantial amount of United States dollars, using the proceeds to reduce monetary liabilities and to replenish reserve assets.

Some of the main quarterly features were:

- a seasonally adjusted current account surplus of \$1.0 billion, resulting from a \$4.6 billion surplus on merchandise trade and a deficit of \$3.6 billion on non-merchandise transactions;
- an increase of 3% in the value of merchandise exports to \$22.2 billion and a rise of 4% to \$17.6 billion in imports. The increase in imports was the first since the third quarter of 1981;
- among exports, increases for crude petroleum, natural gas, automotive products, fish and aluminum, while significant decreases were registered for wheat and barley, and among imports, increases in non-ferrous metals, automotive products and crude petroleum;
- a decrease of half a billion dollars to \$4 billion in the deficit on service transactions. This was totally attributable to a widespread reduction in service payments;
- the lowest surplus (\$337 million) on unilateral transfers in the last two years;
- unadjusted for seasonal variations, a swing of \$3.2 billion from the third quarter of 1981 in the current account balance to a surplus of \$2.0 billion, mainly as a result of a significant increase in the merchandise trade surplus to \$4.6 billion;
- among long-term capital transactions, an increase of \$1.2 billion to \$4.9 billion in the inflow from new bond borrowings abroad. The increase was spread to most Canadian sectors except for the Government of Canada and municipal governments;
- a return to the more historical pattern of net inflows on foreign direct investment in Canada for the first time in the last year and a half. The third quarter net investment of \$250 million resulted mainly from inflows for working capital purposes;
- a shift of \$6.5 billion to a net increase of \$3.5 billion in net official monetary assets. Of this total, \$2.4 billion went to repay short-term bank borrowings and \$1.1 billion to replenish the reserve assets;

## Canadian Balance of International Payments

Current Account — Seasonally Adjusted



Source: Statistics Canada, Quarterly Estimates of the Canadian Balance of International Payments (67-001)

## Energy Statistics

Preliminary data show that imports of crude oil during January-September 1982 declined sharply by 32.0% (7 341 megalitres) from the year-earlier level. This decline is due, in part, to substitution of Canadian for imported oil in the Atlantic provinces (refineries in the Atlantic region have received 524 ML of Canadian oil since June 1982).

Coal production in the first nine months of 1982 increased by 3 055 kilotonnes (10.4%) over the same period in 1981. With exports for the same period increasing by only 513 KT, most of the additional production was added to producers' inventories.

For further information, contact Don Wilson or Mike Valiquette (613-996-3139), Energy and Minerals Section, Manufacturing and Primary Industries Division, Statistics Canada, Ottawa K1A 0T6.

## Railway Carloadings

Revenue freight loaded by railways in Canada in October 1982 totalled 16.7 million tonnes, a drop of 17.0% from the year-earlier level. The carriers received an additional 1.0 million tonnes from the United States, down 27.2% from October 1981.

Commodities registering notable changes in volumes loaded in the latest month were: coal (+10.1%); iron ore and concentrates (-19.6%); grain, other than wheat (-25.6%); and sulphur (-44.3%).

Total loadings in Canada during January-October 1982 showed a decline of 11.6% from the 1981 period.

For further information, order the October 1982 issue of *Railway Carloadings* (52-001, \$1.50/\$15).

- during the quarter, an appreciation of 3.42 U.S. cents in the external value of the Canadian dollar, which closed the quarter at 80.90 U.S. cents. The dollar also appreciated against major overseas currencies.

For further information, contact L. Laliberté (613-996-2545), Balance of Payments Division, Statistics Canada, Ottawa K1A 0T6.

## Canada's Merchandise Trade

On a seasonally adjusted balance-of-payments basis, preliminary results indicate that both imports and exports declined sharply in October 1982. Exports were down 12.0% or \$895 million to \$6.56 billion following a 2.1% increase in September and a 2.3% decline in August. Imports fell 14.6% or \$835 million to \$4.88 billion in October after declines of 3.7% in September and 0.2% in August. This resulted in a \$58 million reduction in the monthly trade surplus, to \$1.68 billion in October from \$1.74 billion in September. Canada's merchandise trade surplus for the January-October 1982 period climbed to a record level of \$14.44 billion, far surpassing the \$5.47 billion of the same period in 1981 and the \$6.53 billion for the first 10 months of the previous record year 1980.

### Commodity Analysis

Seasonally adjusted, on a domestic export basis, the largest decrease recorded in October 1982 was for motor vehicle products (down 35% or \$585 million to \$1,075 million, following a \$280 million decrease in September). Other decreases were registered for exports of non-ferrous metals (down 13.5% or \$65 million to \$425 million, after a \$70 million increase in September), and petroleum and coal products (down 20% or \$65 million to \$230 million, following a \$45 million increase in September). The largest increases posted in October were for other crude material exports (up 57% or \$65 million to \$180 million), and for aircraft (up 51% or \$60 million to \$175 million).

The cutback in imports of motor vehicle products continued in October 1982 with a 33.2% or \$455 million drop to \$915 million. Other major decreases in October imports were recorded for crude petroleum (down 34.7% or \$135 million to \$255 million), industrial machinery (down 16% or \$75 million to \$400 million) and other equipment and tools (down 15.9% or \$60 million to \$315 million). The only significant increase was for aircraft and aircraft parts (up 42.2% or \$50 million to \$175 million), partly as a result of CF18 imports.

### Trading Partner Analysis

Seasonally adjusted, exports to almost all destinations declined in October 1982 as exports to the United States dropped 11.9% or \$605 million to \$4.50 billion following a decline of \$285 million in September; exports to "Other America" countries were down 31.5% or \$100 million to \$215 million after a \$50 million increase in September; exports to "Other E.E.C." countries decreased 17.8% or \$85 million to \$380 million following an increase of \$110 million in September and exports to Japan declined 16.4% or \$65 million to \$335 million.

Imports from all sources were down in October 1982 but the main contributors to the overall sharp decline were the United States (down 19.1% or \$805 million to \$3.41 billion following a decline of \$170 million in September) and "Other America" countries (down 33.5% or \$130 million to \$255 million after an increase of \$45 million in September).

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