

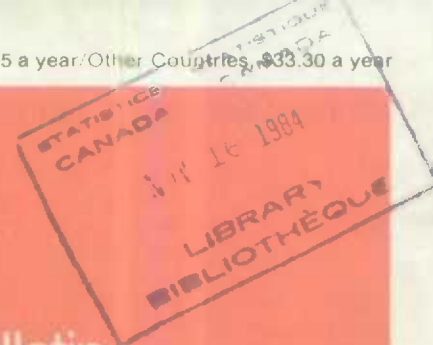


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Weekly Bulletin



November 16, 1984

Retail Trade

Unadjusted Sales

Preliminary estimates of total retail sales in Canada increased 3.4% in September 1984 from the same month a year earlier and reached \$9,281.7 million in current dollars (not adjusted for inflation). The sales estimated for August 1984 were revised upward to \$9,791.8 million and posted a 9.6% rise over the August 1983 sales. Major gains in September were recorded in garages (+17.4%), women's clothing stores (+13.5%) and household furniture stores (+11.9%), while the most notable decreases were reported in household appliance stores (-21.8%, due in part to the temporary removal of the sales tax on furniture and home appliances in Ontario at this time last year), automotive parts and accessories stores (-5.2%) and general stores (-4.8%).

At the provincial level, sales declines were registered in Saskatchewan (7.2%), Alberta (1.4%), Newfoundland (1.3%) and New Brunswick (0.4%). Increases in the remaining provinces varied from 0.8% in British Columbia to 7.5% in the Yukon and Northwest Territories. Sales were higher in the four metropolitan areas surveyed, registering 2.5% in Vancouver, 4.5% in Toronto, 4.8% in Winnipeg and 6.4% in Montreal.

Cumulative retail sales for the first nine months of 1984 were \$82,738.0 million, up 8.8% over the same period a year earlier.

Total sales for the third quarter of 1984 were 5.6% higher than the third quarter of 1983, reaching \$28,500.0 million as compared to \$26,979.2 million for the third quarter of last year.

Seasonally Adjusted Sales

Adjusted for seasonal fluctuations, holidays and the number of selling days, September 1984 retail trade estimates were 2.1% higher than the previous month, with sales of \$9,727.3 million. The most important increases recorded in September were by grocery, confectionery and sundries stores (+6.5%), household furniture stores (+5.7%) and all other food stores (+5.3%). Major drops were reported by family shoe stores (-4.1%), specialty shoe stores (-1.6%) and florists (-1.2%).

Order the September 1984 issue of *Retail Trade* (63-005, \$3.85/\$38.50), or contact Jean-Pierre Simard (613-990-9665), Retail Trade Section, Merchandising and Services Division.

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

		Aug.	Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Aug.	403.35	403.77	3.2
Labour Income (\$ million)	Aug.	19,619.2	19,734.7	5.5
Persons with Jobs (million)	Oct.*	11.15	11.16	2.3
Unemployed	Oct.*	1,305,000	1,363,000	4.2

INVENTORIES

Department Store (\$ million)	Sept.*	3,325.5	3,434.7	0.5
Manufacturers' Owned (\$ million)	Aug.	32,575.4	32,411.6	8.9

ORDERS

Manufacturers' New Orders (\$ million)	Aug.	19,176.6	17,336.6	12.7
Manufacturers' Unfilled Orders (\$ million)	Aug.	22,354.2	22,126.0	33.9

PRICES

Consumer Price Index (1981=100)	Sept.	123.0	122.9	3.8
New House Price Index (1981=100)	Sept.*	94.8	95.1	-0.1
Raw Materials Price Index (1977=100)	Sept.	212.7	214.1	0.8
Excl. coal, crude oil, nat. gas	Sept.	156.1	158.4	2.0
Industry Selling Price Index (1971=100)	Sept.	312.0	312.5	3.6

CONSTRUCTION

Building Permits (\$ million)	Aug.	1,275.4	10,059.2	4.2
Housing Starts — Urban Centres (units)	Sept.	9,545	84,572	-19.1

ENERGY

Coal Production (thousand tonnes)	Aug.	4,711	36,821	32.4
Electricity Generation (terawatt hours)	Aug.	33.7	279.3	9.2
Natural Gas Production (million cubic metres)	Aug.	6,271	57,470	8.5
Petroleum Refining (million cubic metres)	Aug.	8.0	59.4	7.3

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Sept.	9,430	83,521	27.4
Imports — Balance of Payments Basis (\$ million)	Sept.	7,238	69,243	31.0

PRODUCTION

Railway Carloadings (million tonnes)	Aug.	20.9	158.3	20.4
Steel (ingots — thousand tonnes)	July	1,117	8,696	24.6

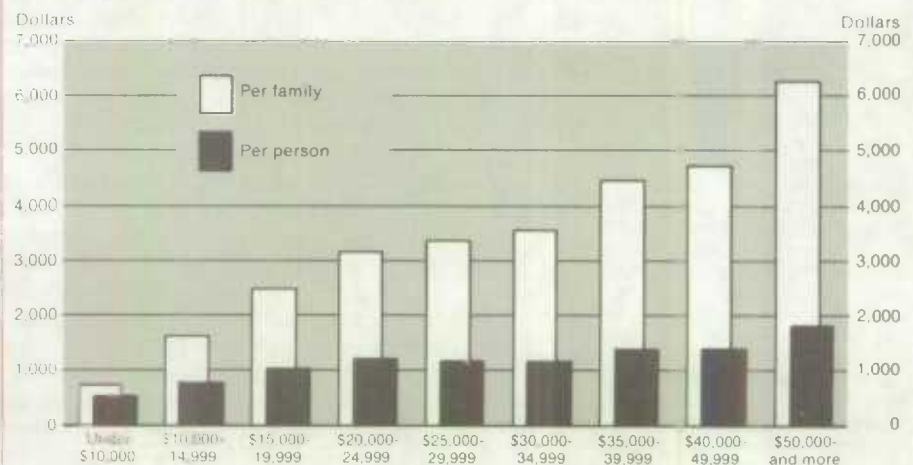
SALES

Department Store Sales (\$ million)	Sept.*	947.9	7,454.4	4.4
Manufacturers' Shipments (\$ million)	Aug.	18,948.4	148,872.6	16.0
New Motor Vehicle Sales (\$ million)	Sept.	1,013.2	11,808.1	32.2
Retail Sales (\$ million)	Sept.*	9,281.7	82,738.0	8.8

Statistics are in current dollars and are not seasonally adjusted.

* - new this week.

Transportation Expenditure per Family and per Person by Family Income, 1982



Source: Statistics Canada, Family Expenditure in Canada, 1982 (62-555)

Current Economic Analysis

There were irregularly large monthly fluctuations in some industries during the summer, notably surges in auto production and exports in July and August that apparently were partly in anticipation of strikes. These gains were accompanied by evidence of weakness in some other sectors of the economy. On balance, it appears that growth for the third quarter as a whole may approximate the rates in the first and second quarters, although there is evidence of a deceleration within the quarter. The United States economy decelerated noticeably in the third quarter while household demand in Canada appears to have subsided recently, making it unlikely that business fixed investment will accelerate significantly in the short term. Wage and price increases continued their restrained rates of growth, and interest rates declined slightly.

Economic growth since 1983 has been unusually dependent compared to post-war cyclical upturns, on a rapid expansion of export demand. Given the importance of exports to the United States, the recent marked deceleration of the American economy is particularly significant. The slowdown of U.S. GNP in the third quarter originated in weakening household demand, in a sharply deteriorating trade balance as the U.S. dollar continued to climb in value, and in a substantial slowdown in the growth of business investment. A sharp increase in auto inventories in the United States in August, just before the United Auto Workers strike, was mirrored in a 50% surge of Canadian exports of passenger cars in the month, which more than accounted for the monthly gain in total exports. The trend of non-automotive export demand to the United States decelerated.

The return of retail sales to slower rates of growth in part reflects the passing of the sharp second quarter rise in disposable incomes: nominal labour income rose only

fractionally in July and employment as measured by the Labour Force Survey declined slightly in August and September, while strike activity rose steadily over this period. These factors, together with the still high interest rate levels, contributed to relative weakness of demand for durable goods and housing.

Order *Current Economic Analysis* (13-004E, Canada: \$2.75/\$27.50; Other Countries: \$3.30/\$33.00), or contact D. Rhoades (613-990-9161), *Current Economic Analysis Division*.

The Labour Force

Canada's seasonally adjusted unemployment rate declined to 11.3% in October 1984, following the sharp increase to 11.8% in the previous month. The fall represented a return to rates experienced during the past year. The unemployment rate dropped by 0.8% to 17.6% among those aged 15 to 24, while a decline of 0.3% to 9.5% was registered for those 25 years of age and older. The seasonally adjusted participation rate decreased 0.2% to 65.0%, while the employment/population ratio rose 0.1% to 57.6%.

Employment for the week ending October 20, 1984 was an estimated 11,077,000, an increase of 32,000 from September. Employment increased by 12,000 among males aged 15 to 24 to 1,246,000 and by 22,000 among those aged 25 and older to 5,172,000. Employment levels among females were virtually unchanged.

Full-time employment rose an estimated 23,000 from the previous month to a level of 9,367,000. This increase was due in large measure to a rise in the estimated number of full-time jobs for males. The level of part-time employment was unchanged from September at 1,713,000.

Increases in employment were recorded in manufacturing (28,000), construction (11,000) and public administration (16,000). There was a decline of 12,000 in the transportation, communication and other utilities industry. Little change was registered in the remaining sectors.

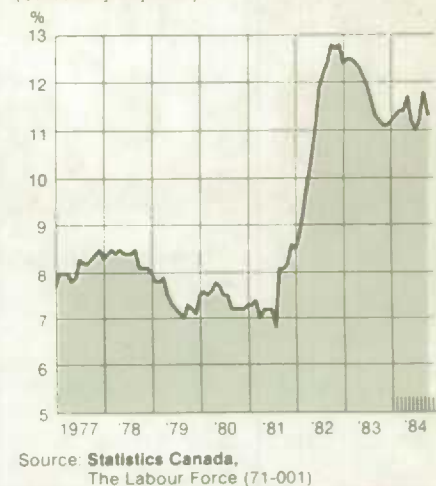
Employment rose in Ontario by an estimated 29,000; there was a decline of 6,000 in Nova Scotia. Employment levels in the remaining provinces showed little change from September 1984.

Unemployment reached an estimated 1,418,000 in October 1984, a decline of 54,000 from the level of a month ago. Among those aged 15 to 24, unemployment levels decreased by 23,000. Within this age group, declines of 7,000 and 16,000 were reported for males and females respectively. Unemployment dropped by 31,000 to 908,000 for people aged 25 and older; men represented 30,000 of those affected.

By province, unemployment decreased by an estimated 6,000 in Newfoundland and 29,000 in Ontario. There was little or no change reported in the level of unemployment in the remaining provinces.

Unemployment Rate, Canada

(Seasonally Adjusted)



Declines in the seasonally adjusted unemployment rates for the provinces in October were as follows: Newfoundland, 21.0% (-1.9%); New Brunswick, 15.6% (-0.3%); Quebec, 12.8% (-0.1%); Ontario, 8.9% (-0.6%); Manitoba, 8.7% (-0.1%); Saskatchewan, 7.9% (-0.6%); and Alberta, 11.8% (-0.2%). The rate rose by 0.4% to 13.6% in Prince Edward Island; 0.5% to 14.1% in Nova Scotia, and 0.2% to 15.1% in British Columbia.

Order the September issue of *The Labour Force* (71-001, \$3.85/\$38.50), or contact Marlene Levine (613-990-9447) or Ken Bennett (613-990-9448), *Labour Force Survey*.

Report on the Demographic Situation

While the mortality rate in Canada continues to decline, a notable decrease in deaths among males has been observed. However, among women, the rate of increase is surprisingly high for deaths due to lung cancer.

The publication entitled *Report on the Demographic Situation in Canada, 1983* shows the Canadian birth rate has declined steadily in recent years, falling from 16.3 per 1,000 in 1972 to an estimated 14.8 per 1,000 in 1983. And while the child population is declining, the adult population is swelling; nearly two-thirds of Canada's population — 15 million people — were between the ages of 18 and 64 in 1983. By contrast, adults comprised slightly more than half of the country's population in 1961.

The first of the *Current Demographic Analysis Series*, this publication examines past and current population characteristics of Canada and the provinces, including age structure, marriage and divorce, fertility, mortality and internal and international migration.

Order the report on the *Demographic Situation in Canada, 1983* (91-201E, Canada: \$6.35; Other Countries: \$10.60), or contact Jean Dumas (613-990-9583), *Demography Division*.

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New Housing Price Index

The New Housing Price Index (1981=100) for Canada decreased 0.3% to 94.8 in September from its August level of 95.1. This was principally due to the impact of declines in Vancouver and Ottawa. This index of Canadian housing contractors' selling prices now stands 0.1% lower than the year-earlier level of 94.9. In September, the estimated House Only Index decreased 0.2% to 97.2 while the estimated Land Only Index decreased 0.2% to 90.9.

Between August and September 1984, the largest decreases in the New Housing Price Index were recorded for the metropolitan areas of Ottawa-Hull and Vancouver, both registering declines of 1.3%. Smaller decreases were observed in Victoria (-0.9%), Windsor (-0.3%) and Calgary (-0.2%). The most significant increases in the price index were recorded for St. Catharines-Niagara (0.8%), and Kitchener (0.7%). Smaller increases were registered for Quebec City (0.4%), Montreal (0.3%), Winnipeg (0.3%), St. John's (0.2%), Hamilton (0.2%) and Regina (0.2%).

Between September 1983 and September 1984, the largest year-over-year decrease was recorded for Victoria (-10.1%), followed by Calgary (-6.6%), Edmonton (-6.1%), Regina (-1.2%) and Vancouver (-0.9%). The largest year-over-year increase was recorded for Saint John-Moncton (7.8%), followed by St. Catharines-Niagara (6.7%), Ottawa-Hull (6.1%), Windsor (5.0%), Hamilton (4.6%), Quebec City (4.2%) and Montreal (4.0%). Smaller increases ranging from 3.9% to 0.7% were noted for London, St. John's, Kitchener, Winnipeg, Toronto and Saskatoon.

Order Construction Price Statistics (62-007, \$3.30/\$33), or contact Prices Division (613-990-9601).

Pulpwood and Wood Residue

Canadian production of roundwood decreased 6.7% to 4 546 239 cubic metres in September 1984 from 4 874 933 cubic metres a year earlier. Consumption of roundwood and wood residue increased 1.0% to 6 884 346 cubic metres from 6 819 471 cubic metres in September 1983.

The closing inventory of these two products registered a 10.7% decrease, falling to 20 522 922 cubic metres from 22 991 077 cubic metres for the same month in 1983.

Receipts of wood residue increased 4.2% to 3 709 272 cubic metres compared to 3 580 342 cubic metres for September 1983.

Order the September 1984 issue of *Pulpwood and Wood Residue Statistics* (25-001, \$1.60/\$16), or contact Colin F. Sturton (613-990-9826), Manufacturing and Primary Industries Division.

International Travel

During September 1984, an estimated 3.2 million United States residents entered Canada, a 1.8% decrease from a year earlier. Visitors from other countries increased by 4.8% to 205,300. The total non-resident entries to Canada during September numbered 3.4 million, down 1.4% from the same month last year.

Canadian residents re-entering the country following visits to the United States totalled 3.1 million, down 5.6% from September 1983. By comparison, the number of Canadians returning from travel in other countries increased 14.1% to 191,800. During September 1984, the total number of residents returning to Canada reached 3.3 million, down 4.6% from the previous year.

The international travel flows during the first nine months of 1984 were as follows:

- 26.9 million United States residents entered Canada, a 0.2% increase from January-September 1983;
- visitors from other countries increased by 6.2% to 1.6 million;
- Canadians returning from the United States decreased by 5.5% to 28.9 million;
- residents returning from other countries rose by 17.3% to 1.6 million.

Long-term tourist entries from the United States in September 1984 (including overnight or longer auto and bus traffic and all entries by boat, plane and train) decreased 2.6% to 1.2 million. Residents from other countries — excluding those arriving by land via the United States and intending to stay less than 24 hours — numbered 184,800, up 4.5% from last year. Canadian tourist re-entries from the United States were 956,300, down 7.8%, while residents returning from countries other than the United States increased by 14.1% to 191,800.

On a year-to-date basis, tourists to Canada from the United States increased by 3.9% to 10.0 million; tourists from other countries numbered 1.4 million, up 6.0% from last year. Canadian tourist re-entries from the United States numbered 9.0 million in the January-September period, down 8.1% from 1983, while residents returning from countries other than the United States increased by 17.3% to 1.6 million.

Order the September 1984 issue of *International Travel — Advance Information* (66-002, \$1.60/\$16), or contact Paul L. Paradis (613-990-8932), International Travel Section.

Tuition and Living Costs at Universities

Tuition fees charged to full-time Canadian students rose in every university across the country with the exception of five institutions in Quebec during the 1984-85 academic year. Percentage increases at the undergraduate level varied considerably, with most registering between 5% and 14%.

Regionally, tuition increases varied the most in British Columbia with the majority falling between 22% and 51%. Tuition hikes in the Prairie provinces ranged from 6% to 13%. For the most part, increases in Ontario

were about 5%; the two Quebec institutions that did raise tuition fees showed substantial variation at 6% and 36%. In the Atlantic provinces, increases ranged from 5% to 14%.

Undergraduate tuition fees were generally lowest in Quebec, at approximately \$500 to \$600 per academic year. In other provinces, fees ranged from \$800 to \$1,500, with some exceptions noted at both ends of the scale. Undergraduates paid between \$1,200 to \$1,400 in British Columbia; \$800 to \$1,000 in the Prairies; \$1,200 to \$1,400 in Ontario; \$1,200 to \$1,500 in the Maritimes; and \$900 in Newfoundland.

During the 1984-85 academic year, British Columbia introduced differential tuition fees for foreign undergraduates; Newfoundland, Manitoba and Saskatchewan are the only provinces that do not currently have a differential fee structure. In Alberta and British Columbia, foreign students pay one-and-a-half times the fee charged to Canadians, while in New Brunswick, Nova Scotia and Prince Edward Island, tuition costs are double for non-Canadians. In Ontario, foreign fees are three to five times higher and in Quebec, ten to thirteen times the amount paid by Canadians. Foreign fees vary significantly, from \$1,200 to \$7,200, depending on the province, the discipline, and whether the students are new or continuing. Amounts are generally lowest in Alberta and British Columbia and highest in Quebec and Ontario.

Order the 1984-85 edition of *Tuition and Living Accommodation Costs at Canadian Universities*, (81-219, \$6.65), or contact R. Lortie or R. Bélanger, Postsecondary Education Section.

Vending Machine Operators

Vending machine operators in Canada reported sales through vending machines totalling \$340.9 million in 1983, down 6.2% from \$363.3 million in 1982. The number of operators decreased from 701 in 1982 to 681 in 1983, while the number of machines went up slightly from 122,598 to 122,683 during the same period.

A breakdown of sales by type of machine in the latest year follows (percentage change from 1982 in parentheses):

- Cigarette machines (24,471 units), \$116.9 million (-13.8%)
- Coffee machines (15,790 units), \$61.7 million (-5.1%)
- Soft drink machines (28,907 units), \$69.6 million (+5.5%)
- Milk, juices and hot and cold beverage combination machines (3,814 units), \$15.8 million (-15.2%)
- Packaged confections, pastry, snack and confectionery combination machines (14,620 units), \$48.0 million (-1.8%)
- Fresh food combination machines (4,491 units), \$21.0 million (+2.9%)
- All other vending machines (30,590 units), \$7.9 million (-4.8%)

The publication *Vending Machines Operators, 1983* (63-213, \$6.35) will be released at a later date. Contact the Retail Trade Section (613-990-9665) or Telex (053-5585), Merchandising and Services Division.



PUBLICATIONS RELEASED NOVEMBER 9 — 15

	Cata- logue No.	In Canada: Price per issue/year	Elsewhere: Price per issue/year
AGRICULTURE STATISTICS			
Livestock Report: Pigs, October 1, 1984	23-008	\$4.40/\$17.60	\$5.25/\$21.10
Stocks of fruit and vegetables, October 1, 1984	32-010	\$1.60/\$16	\$1.90/\$19
CENSUS			
Summary Guide: Sample population, 1981 Census of Canada	99-903	\$9.50	\$11.40
DEMOGRAPHY			
Report on the demographic situation in Canada, 1983	91-209E	\$8.85	\$10.60
EDUCATION, CULTURE AND TOURISM			
Tuition and living accommodation costs at Canadian universities, 1983-84 and 1984-85	81-219	\$5	\$6
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National income and expenditure accounts, 1969-1983	13-201	\$8.85	\$10.60
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Asphalt roofing, September 1984	45-001	\$1.60/\$16	\$1.90/\$19
Confectionery, Quarter ended September 1984	32-027	\$2.75/\$11	\$3.30/\$33
Electric power statistics, August 1984	57-001	\$2.75/\$27.50	\$3.30/\$33
Footwear statistics, September 1984	33-002	\$1.60/\$16	\$1.90/\$19
Gas utilities, July 1984	55-002	\$2.75/\$27.50	\$3.30/\$33
General review of the mineral industries: Mines, quarries and oil wells, 1982	26-201	\$5	\$6
Gypsum products, September 1984	44-003	\$1.60/\$16	\$1.90/\$19
Production, shipments and stocks on hand of sawmills east of the Rockies, August 1984	35-002	\$2.75/\$27.50	\$3.30/\$33
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The sugar situation, September 1984	32-013	\$1.60/\$16	\$1.90/\$19
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Department store sales and stocks, August 1984	63-002	\$3.30/\$33	\$3.95/\$39.50
Merchandising inventories, August 1984	63-014	\$2.75/\$27.50	\$3.30/\$33
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Railway operating statistics, May 1984	52-003	\$2.75/\$27.50	\$3.30/\$33
Service Bulletin			
Communications, Vol. 14, No. 4, Broadcasting statistics — Radio and television (including CBC), 1983	56-001	\$1.60/\$16	\$1.90/\$19

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