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Weekly Bulletin

January 11, 1985

Financial Statistics of Education

Education spending at all levels rose 14.0% in 1981-82 to \$25.4 billion. These expenditures represented 7.5% of the Gross National Product (GNP), the same percentage as in 1980-81. On the other hand, education spending per capita of population was \$1,045 (12.6% more than 1980-81), or \$2,136 per labour force member (10.8% more than 1980-81).

The three levels of government financed 92.3% of the total budget, private sources accounted for 7.7%.

The 1981-82 breakdown of total education spending by level is as follows: elementary and secondary, 66.0%; college, 8.4%; university, 19.6% and vocational training, 5.0%.

Elementary and secondary spending was \$16.8 billion in 1981-82 (\$14.7 billion in 1980-81), an increase of 13.9% despite a 1.4% drop in enrolment. They represented 5.0% of the Gross National Product in 1981-82, the same as in the previous year.

Postsecondary education spending rose by 13.9% in 1981-82 to \$7.1 billion, or 2.1% of the GNP. Vocational training expenses rose by 15.9% in 1981-82 to \$1.5 billion, or 0.5% of the GNP.

(continued page 2, col. 1)

Employment and Earnings

The preliminary estimates of employment for the Canada industrial aggregate increased by 0.6% from September to October 1984. Increases were registered in all industry divisions except forestry, manufacturing and construction. All provinces reported increases except Newfoundland, New Brunswick, and the Yukon and Northwest Territories.

Average weekly earnings at the Canada industrial aggregate level decreased by 0.4% from \$408.99 in September to \$407.37 in October. All industry divisions registered declines except mining, trade and finance, insurance and real estate. Increases were noted for Newfoundland, British Columbia and the Northwest Territories; levels in the remaining provinces and the Yukon Territory declined.

Order the October issue of Employment, Earnings and Hours (72-002, \$5.55/\$55.50), or contact the Labour Division (613-990-9900).

LATEST MONTHLY STATISTICS

EMPLOYMENT, INCOME

			Previous Month	% Change From Year Ago
Average Weekly Earnings (\$)	Oct.*	407.37	408.99	-0.4
Labour Income (\$ million)	Sept.	20,019.4	19,716.8	1.3
Persons with Jobs (million)	Nov.	11.05	11.15	2.4
Unemployed	Nov.	1,355,000	1,305,000	4.5

INVENTORIES

Department Store (\$ million)	Oct.	3,924.2	3,325.5	5.1
Manufacturers' Owned (\$ million)	Oct.	32,947.7	32,732.9	8.8

ORDERS

Manufacturers' New Orders (\$ million)	Oct.	20,277.7	18,868.3	11.7
Manufacturers' Unfilled Orders (\$ million)	Oct.	22,232.6	22,043.8	9.6

PRICES

Consumer Price Index (1981=100)	Nov.	124.0	123.2	4.0
New House Price Index (1981=100)	Nov.*	94.5	94.8	-0.6
Raw Materials Price Index (1977=100)	Nov.*	221.4	212.6	5.0
Excl. coal, crude oil, nat. gas	Nov.*	156.2	155.1	2.2
Industry Selling Price Index (1971=100)	Nov.*	313.5	312.3	3.9

CONSTRUCTION

Building Permits (\$ million)	Oct.*	1,311.1	12,733.4	4.2
Housing Starts — Urban Centres (units)	Oct.	8,863	93,435	-17.9

ENERGY

Coal Production (thousand tonnes)	Sept.	4,871	41,684	30.7
Electricity Generation (terawatt hours)	Sept.	31.5	311.1	8.7
Natural Gas Production (million cubic metres)	Sept.	6,560	64,040	8.5
Petroleum Refining (million cubic metres)	Sept.	6.2	65.6	3.5

FOREIGN TRADE

Exports — Balance of Payments Basis (\$ million)	Oct.	10,244	93,765	27.2
Imports — Balance of Payments Basis (\$ million)	Oct.	8,241	77,484	29.5

PRODUCTION

Railway Carloadings (million tonnes)	Nov.*	21.7	222.9	17.1
Steel (ingots — thousand tonnes)	Nov.	1,208	13,483	15.6

SALES

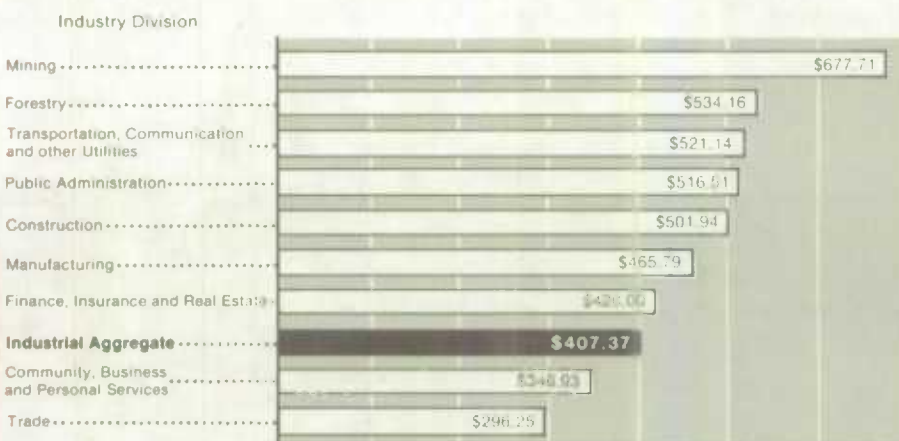
Department Store Sales (\$ million)	Oct.	957.6	8,411.9	4.4
Manufacturers' Shipments (\$ million)	Oct.	20,088.9	188,036.8	14.3
New Motor Vehicle Sales (\$ million)	Oct.	1,532.2	13,340.3	32.1
Retail Sales (\$ million)	Oct.	9,846.0	92,553.7	8.8

Statistics are in current dollars and are not seasonally adjusted.

* - new this week.

Average Weekly Earnings in Canadian Industry

October 1984*



Source: Statistics Canada, Employment, Earnings and Hours (72-002)

* Preliminary Estimates

Canada

... Financial Statistics of Education

Trends show that education expenditures in current dollars rose steadily between 1971 and 1981, from \$8.4 billion to \$25.4 billion. Over this same period, full-time student enrolment fell from 6.3 million to 5.7 million.

Order Financial Statistics of Education, 1981-82 (81-208; Canada: \$8.85; Other Countries: \$10.60), or contact François Gendron (613-990-8356), Education, Culture and Tourism Division.

Help-wanted Index

The revised seasonally adjusted Help-wanted Index (1981=100) for Canada was unchanged at 60 between November and December 1984. However, the quarterly average fell to 61 in the fourth quarter from 64 recorded in the previous period. Comparing annual averages, the index increased to 59 in 1984 from 45 in 1983.

By region, the Help-wanted Index decreased between November and December in Quebec (to 63 from 69), Ontario (to 66 from 67), the Prairie Provinces (to 34 from 37) and British Columbia (to 22 from 28). Only the Atlantic Provinces registered an increase (to 220 from 80). Similar to past observations, the large increase is in the main the result of large ads placed by the Newfoundland government in a St. John's newspaper.

Contact Horst Stiebert or J.P. Maynard (613-990-9900), Labour Division.

Building Permits

The seasonally-adjusted value of building permits issued by Canadian municipalities in October decreased 4.7% to \$1,221.7 million from \$1,282.1 in the previous month. A drop in the residential sector combined with a weakening non-residential sector were the main causes of the decrease.

The value of residential construction authorized in October slipped 7.6% to \$635.5 million from \$687.5 million in September; both single and multiple dwellings registered a drop. On a seasonally-adjusted basis, 10,153 units were approved in October, down 8.0% compared to 11,037 units for the preceding month. Translated into annual terms, the October approvals represent a seasonally-adjusted rate of 121,800 units compared with 132,400 in September. British Columbia and the Prairie provinces recorded declines in construction approvals while those in Ontario, Quebec and the Atlantic provinces levelled off.

The value of non-residential building permits declined marginally (1.4%) in October to a seasonally-adjusted \$586.2 million. The rises in the commercial (+3.3%) and public sectors (+4.8%) did not offset the significant decrease in the industrial sector (-20.3%). Viewed in annual terms, the October approvals showed a seasonally-adjusted value of \$7,034 million compared to \$7,135 million in September. Declines occurred in the Atlantic provinces, Quebec and Ontario while the situation improved in the western provinces.

Order the October issue of Building Permits (64-001, \$3.85/\$38.50), or contact G. Lemay (613-990-9689), Construction Division.

International Travel

Total Travellers

During November 1984, preliminary statistics show that an estimated 1.9 million United States residents entered Canada, an increase of 11.1% over November 1983. Visitors from other countries increased by 16.3% to 82,000.

Canadian residents re-entering the country following visits to the United States totalled 2.5 million, down 4.8% from November 1983. Canadians returning from visits to all other countries increased by 10.1% to 109,000.

The international travel flows during the first 11 months of 1984 were as follows:

- 31.2 million United States residents entered Canada, a 0.9% increase from January-November 1983;
- visitors from other countries increased by 6.4% to 1.8 million;
- Canadians returning from the United States decreased by 6.0% to 34.3 million;
- residents returning from other countries rose by 15.4% to 1.9 million.

Long-term Travellers

Preliminary estimates show that long-term tourist entries from the United States increased 7.8% to 473,000 in November 1984. Residents from other countries numbered 75,000, up 15.1% from last year. Canadian tourist re-entries from the United States declined by 8.0% to 642,000, while residents returning from countries other than the United States increased by 10.1% to 109,000.

On a year-to-date basis, tourists to Canada from the United States increased by 3.9% to 11.2 million; tourists from other countries numbered 1.6 million, up 6.3% from last year. Canadian tourist re-entries from the United States numbered 10.4 million, down 8.5% from 1983, while residents returning from countries other than the United States increased by 15.4% to 1.9 million.

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

Current Economic Analysis

Following the marked increases in output and employment in June and July, the trend of economic growth appears to be softening entering the fourth quarter. Output declined modestly in August before stabilizing in September, while employment has grown only marginally between July and November. This reflects an offset between relative weakness in goods and a firming in the service sector. Few goods-producing industries have registered sustained growth since early in the summer, reflecting the large number of irregular influences operating on the economy in recent months, notably the course of labour negotiations in the auto industry. The contrast between the strong increases in the average quarterly level in many indicators, and the weakening trend recorded over the last three months, serves to reinforce the impression that a large part of these increases were irregular. Inflation remained at very low rates into October, while interest rates eased further during November.

The trend of output and employment in the autumn reflects the continued sluggish course of domestic demand and the slowdown of the United States economy which was beginning to restrain export demand. Consumer demand, notably for durable goods and housing, showed signs of weakening in response to sluggish real incomes, flat consumer confidence, and a hesitancy to acquire credit at a time of high financing costs. Business firms, saddled with relatively low capacity utilization and still-high levels of interest payments on debt, continued to place more emphasis on restructuring balance sheets than on increasing investment outlays. This prudent stance of firms was also evident in relatively low stock-to-ships ratios, which have changed little in the past year. The deceleration of export demand apparent in the data for September and October re-aligns Canadian exports with the trend of United States demand, following a large divergence in July and August due to irregular factors.

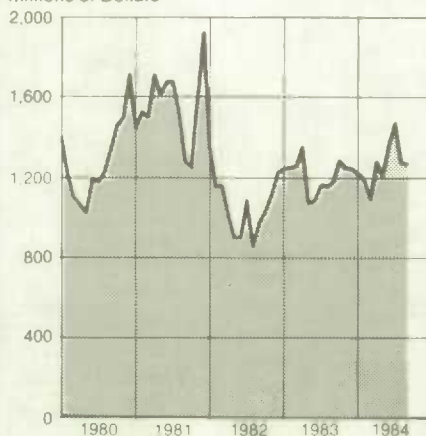
These restraining influences are most evident in output and employment data for the goods-producing sector. Aggregate output late in the third quarter, and employment early in the fourth quarter, were buoyed by gains in the service sector. Given that service-producing industries account for nearly half of aggregate demand, and nearly two-thirds of production and employment, this sector should serve as an important buttress to the economy in the fourth quarter. In terms of the regional distribution of economic activity, the strengthening in services was most evident in western Canada, following a weak performance in the first half of the year. The slowdown in manufacturing activity apparent by the autumn largely affected Quebec and Ontario, where the bulk of these industries are concentrated.

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.

Building Permits, Canada

(Seasonally Adjusted)

Millions of Dollars



Source: Statistics Canada, Building Permits (64-001)

Raw Materials Price Index

Following the series of monthly price decreases observed since May 1984, the Raw Materials Price Index (1977=100) rose to a preliminary level of 221.4 in November, up 4.1% from its revised October level of 212.6. Between November 1983 and November 1984, the Raw Materials Price Index increased 5.0%, up sharply from the average 0.8% annual increase registered over the previous three months. Excluding the coal, crude oil and natural gas component, the Raw Materials Price Index rose 0.7% between October and November and stood 2.2% higher than its year-earlier level, in line with its annual average increase of 2.0% recorded over the last few months.

Of the eight component indexes in the Raw Materials Price Index, four increased between October and November, while three decreased and one was unchanged. The coal, crude oil and natural gas component rose 6.8% on a monthly basis and was principally responsible for the upturn in the Raw Materials Price Index in November. Also having an impact was an increase of 1.8% in the index for animals and animal products. Although its effect on the Raw Materials Price Index was minimal, the non-ferrous metals index (1.9%) exhibited some strong price movements.

Order the November 1984 issue of Industry Price Indexes (62-011, \$3.85/\$38.50), or contact the Information Unit (613-990-9615), Industrial Prices Section, Prices Division.

Industrial Corporations

Third quarter 1984 final survey results show seasonally adjusted pre-tax profits of industrial corporations in Canada rose 3.6% to \$9.0 billion from the preceding quarter. This follows similar growth rates of 3.7% and 3.3% for the previous two quarters and represents the ninth consecutive quarter of growth in seasonally adjusted pre-tax profits. The current pre-tax profit figure is at the highest level since the \$9.3 billion recorded in the first quarter of 1980.

On a year-to-year basis, pre-tax profits rose 18.9% to \$8.7 billion from third quarter 1983 to the current quarter. Year-over-year sales increased from \$138.6 billion a year ago to \$152.7 billion in third quarter 1984, a rise of 10.2%.

Balance Sheet data (available for corporations with assets exceeding \$10 million) show that the working capital ratio, an indicator of short-term liquidity, has remained at 1.44 times for the last three quarters. In line with the need to finance expanded operations, the actual level of working capital has grown for seven consecutive quarters to the current value of \$37.5 billion. This is well above the low of \$30.7 billion recorded in fourth quarter 1982 during the recession.

Long-term corporate liquidity as measured by long-term debt (excluding affiliated debt) to equity continued to improve. This ratio, which indicates to what extent corporations rely on borrowed funds, currently stands at 50.8%. This compares favourably with the 52.3% of second quarter

Industry Selling Price Index

Preliminary estimates show that the Industry Selling Price Index for manufacturing (1971=100) stood at 313.5 in November 1984, up 0.4% from the revised October level of 312.3. With this increase, the year-over-year advance rose to 3.9%, the first increase in the annual rate since July 1984. An upswing in the petroleum and coal products industry (3.5%) was responsible for both the monthly gain of 0.4% and the annual change of 3.9%. A rise in the food and beverage industry (0.4%) also contributed to the increase for the month, while a decline in the paper and allied industries (-0.7%) had a moderating effect on the overall index.

The petroleum and coal products component index jumped 3.5% in November, chiefly as a result of an increase in the petroleum compensation charge that went into effect on November 10. The main stimulus for the monthly change in the food and beverage industry index was a 1.1% surge in the slaughtering and meat processors index. A 0.9% decrease in the pulp and paper mills index, mainly attributable to a 0.6% depreciation of the US dollar against its Canadian counterpart, was largely responsible for the decline in the group index.

Order the November 1984 issue of Industry Price Indexes (62-011, \$3.85/\$38.50), or contact the Information Unit (613-990-9615), Industrial Prices Section, Prices Division.

Local Government Employment

At the end of September 1984, the number of employees involved in general government services of local government across Canada was 299,688. This represents a decrease of 4.5% from the 313,665 reported at the end of the previous quarter, and a 0.1% decline compared to September 1983.

The gross payrolls of local government for the third quarter of 1984 amounted to \$1,783,059,000, an increase of 6.8% over the \$1,669,122,000 reported for the previous quarter and a 4.0% rise over July-September 1983.

Order the July-September 1984 issue of Local Government Employment (72-009, \$4.40/\$17.60), or contact Public Institutions Division (613-990-8305).

1984 and the recent high of 57.9% in fourth quarter 1982.

The annualized return on shareholders' equity — using seasonally adjusted profit after taxes but before extraordinary items — was 10.7% in third quarter 1984. This is the fourth straight quarter that this indicator of profitability has exceeded 10%.

Dividends paid by corporations in third quarter 1984 totalled \$1.6 billion or 41.8% of net profit. This compares with \$1.9 billion, or 46.5% of profit last quarter, and \$1.4 billion or 45.9% of profit a year ago in third quarter 1983.

Order Industrial Corporations: Financial Statistics (61-003, \$11.10/\$44.40), or contact Yvette Mondesir or Bill Potter (613-990-9843), Business Finance Division.

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Federal Government Employment

Employees of the federal government (including members of the Canadian Armed Forces) and government enterprises numbered 593,251 as of September 1984, an overall increase of 3,138 (0.5%) from September 1983. General government employees increased by 4,396 (1.0%), while those in government enterprises declined by 1,258 (-0.9%).

Gross payroll (including overtime and retroactive payments) for July-September 1984 was \$4,155.9 million, a decrease of \$103.2 million (-2.4%) from the corresponding quarter in 1983.

Order the July-September 1984 issue of the publication Federal Government Employment (72-004, \$5.55/\$22.20), or contact T. Moore or M. Fathy (613-990-8305), Public Institutions Division.

Farm Cash Receipts

Farm cash receipts for the period January-November 1984 are estimated at \$18,192.6 million, a 6.4% increase over the revised 1983 January-November estimate of \$17,103.3 million.

Receipts from the sale of field crops reached an estimated \$8,846.9 million, 5.8% higher than last year's estimate of \$8,360.6 million. Wheat, oats, rapeseed, and potatoes were up while receipts for barley, flaxseed, rye, soybeans, corn and Canadian Wheat Board payments declined.

Cash receipts from the sale of livestock and livestock products were estimated at \$8,801.2 million, a 5.7% rise over the revised 1983 level of \$8,326.0 million. Other receipts were up 30.7% at \$544.5 million from the previous year's revised total of \$416.7 million.

Order the January-November 1984 issue of Farm Cash Receipts (21-001, \$1.60/\$16), or contact John Lanthier (613-990-8706), Agriculture Statistics Division.



PUBLICATIONS RELEASED JANUARY 4 — 10

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AGRICULTURE STATISTICS			
Farm cash receipts, January-October 1984	21-001	\$1.60/\$16	\$1.90/\$19
BALANCE OF PAYMENTS			
Quarterly estimates of the Canadian balance of international payments, third quarter 1984	67-001	\$6.65/\$26.60	\$7.95/\$31.90
CONSTRUCTION			
Building permits, September 1984	64-001	\$3.85/\$38.50	\$4.60/\$46
Housing starts and completions, October 1984	64-002	\$3.30/\$33	\$3.95/\$39.50
CURRENT ECONOMIC ANALYSIS			
Current economic analysis, October 1984	13-004E	\$2.75/\$27.50	\$3.30/\$33
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Universities: Enrolment and degrees, 1982	81-204	\$7.75	\$9.30
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