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A WEEKLY REVIEW

Friday, December 20, 1991

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OVERVIEW

■ Merchandise Trade Balance Recovers

Slightly increased exports and reduced imports caused Canada's trade balance to change from a deficit of \$286 million in September to a surplus of \$69 million in October.

■ Manufacturers' Shipments Fall in October

Canadian manufacturers' shipments fell by 1.5% to \$23.0 billion in October, the third decrease in the last four months.

■ Turnaround in Cross-border Travel

Travel between Canada and the United States rebounded in October following sharp declines in September.

■ Provincial Government Deficit to Double in 1991-1992

In 1991-92, provincial and territorial government expenditures are expected to exceed revenues by \$15.4 billion, more than double the \$6.9 billion deficit posted in 1990-91.

■ Labour Productivity: Manufacturing Sector Up But Business Sector Down

Canadian manufacturers raised productivity in 1990 by decreasing employment but labour productivity for the business sector fell due to difficult economic conditions.

■ Average Family Income Decreased in 1990

Average Canadian family income decreased 1.6% in 1990, reversing a six-year upward trend.

This issue also contains information on the demographic situation in Canada and university enrolment.

Merchandise Trade Balance Recovers

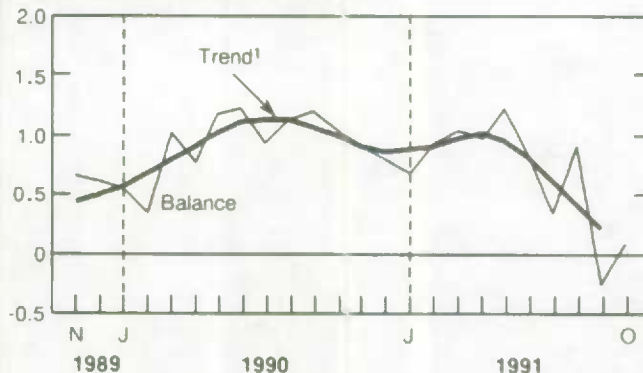
The seasonally adjusted value of exports edged up \$31 million to \$11.7 billion in October after plunging by almost \$750 million in September. Increases totalling \$235 million were recorded almost entirely by those commodity groupings that tend to experience wide month-to-month fluctuations. Special transactions, which include low value shipments not classified by nature of merchandise, contributed \$115 million, followed by automotive products, \$99 million, and energy products, \$21 million.

Exports of aircraft and miscellaneous transportation equipment, a group noted for its sharp monthly swings, were down \$39 million. Other declines included forestry products, down \$79 million; industrial goods and materials declined by \$70 million; and other consumer goods fell by \$4 million.

(continued on page 2)

Merchandise Trade Balance Balance of Payments Basis

Billions of dollars, seasonally adjusted



¹ The short-term trend represents a weighted average of the data.



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Canada

For further information, order Monthly Survey of Manufacturing (catalogue number 31-001) or contact Industry Division at (613) 951-9832.

Turnaround in Cross-border Travel

Cross-border travel rebounded in October after dropping sharply in September when delays at Canada Customs, due to various labour disputes, had an impact on travel.

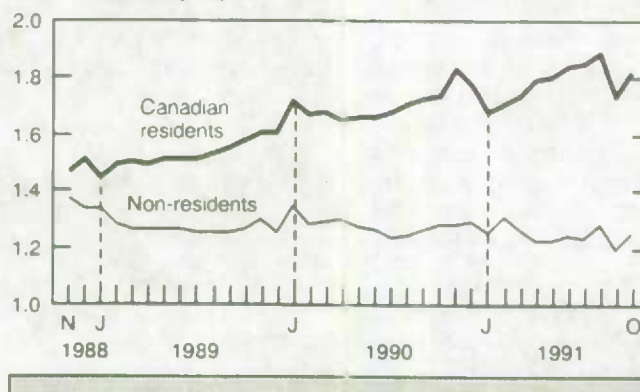
On a seasonally adjusted basis, same-day automobile visits by Canadian residents to the United States jumped 8.2% in October to a level of 4.9 million, slightly below the record 5.0 million recorded in November 1990.

Overnight trips by Canadians to the U.S. increased 5.8% to 1.6 million after posting a 9.4% drop in September. Similar trips to other countries rose 1.7%, recording the second straight monthly increase. In total, overnight trips by Canadians advanced to 1.8 million in September.

The number of travellers from the U.S. on trips of one or more nights to Canada was up 5.8% to 1.0 million following a 7.6% fall in September while comparable trips by residents of other countries decreased 1.5%. Overnight trips to Canada by foreign visitors totalled 1.2 million.

Trips of One or More Nights between Canada and Other Countries

Millions, seasonally adjusted



For further information, order *International Travel - Advance Information* (catalogue number 66-001P) or contact Education, Culture and Tourism Division at (613) 951-8933.

Provincial Government Deficit to Double in 1991-92

Provincial and territorial revenues in 1991-92 are expected to reach \$146.4 billion, an increase of 3.2% over 1990-91, while expenditures are estimated to total \$161.8 billion, 8.7% higher than the 1990-91 revised estimates. The resulting \$15.4 billion deficit exceeds the largest previous deficit (\$12.1 billion) posted in 1986-87. Provincial and territorial governments have been experiencing deficits since 1978-79, when they recorded a small surplus (\$0.1 billion).

The 1991-92 estimates are based on the 1991 provincial budgets and other financial statements and do not include revisions made subsequent to their budgets. Included in these estimates are data for departments, agencies, boards and commissions but revenues and expenditures of government enterprises are excluded.

Most of the major revenue sources are estimated to show increases in 1991-92. Personal income taxes are expected to total \$40.8 billion, a rise of 3.6% over 1990-91. General sales tax revenue and natural resource revenues are estimated to advance 8.7%

and 9.5%, respectively, in 1991-92. Transfers from other levels of government are expected to decrease 3.0% to \$25.8 billion.

All of the major functional expenditure groups are estimated to increase in 1991-92. Expenditures on social services (\$27.7 billion), resource conservation (\$8.5 billion) and environment (\$1.9 billion) each are estimated to show double-digit increases in 1991-92 - rising 15.9%, 10.7% and 10.2%, respectively. Health (\$43.8 billion) is expected to rise 9.1%, followed by debt charges (8.9% to \$19.2 billion) and education (7.5% to \$30.6 billion).

Note to Users:

The Financial Management System (FMS) provides a standardized presentation of government accounting for the federal, provincial and local governments in Canada. The individual governments' accounting systems are not directly comparable because the policies and structure of governments differ. The FMS adjusts data from government budgets, estimates, public accounts and other records to provide detailed, comparable governmental data as well as national aggregates that are consistent over time. But for these reasons, FMS statistics may not accord with the figures published in individual government financial statements.

For further information, contact Public Institutions Division at (613) 951-1820.

Labour Productivity: Manufacturing Sector Up But Business Sector Down

Despite a slowdown in economic activity, Canadian manufacturers raised labour productivity by 1.3% in 1990 by decreasing employment (-5.4%) and curtailing annual average hours worked (-1.2%) while reducing real output only 5.3%. The manufacturing sector faced a 7.0% increase in hourly labour compensation, the highest in seven years, and weak demand for domestically-produced manufactured goods.

Revised labour productivity estimates for the Canadian business sector in 1990 show a decline of 0.7%, compared to the 0.4% increase reported on April 24, 1991. Even though the increase in compensation per person-hour decelerated to 6.9% in 1990 from 7.2% in the previous year, the 0.7% decline in productivity (in terms of output per

Measures of Labour Productivity

	1986	1987	1988	1989	1990
	% change, previous year				
Business Sector					
Output	3.5	5.0	5.2	2.4	-0.6
Output per person-hour	1.6	1.0	1.1	1.0	-0.7
Unit labour cost	3.2	4.7	5.4	6.1	7.6
Manufacturing					
Output	0.7	4.8	5.2	0.3	-5.3
Output per person-hour	-1.6	0.9	0.5	0.5	1.3
Unit labour cost	5.5	2.0	3.5	5.9	5.6

person-hour worked) resulted in an increase of 7.6% in the unit labour cost. Unit labour cost increases were the highest since 1982.

For further information contact Input-Output Division at (613) 951-3687.

Average Family Income Decreased in 1990

After adjustment for inflation as measured by changes in the consumer price index, average family income in 1990 was an estimated \$51,633, down 1.6% from 1989. The 1990 decline reverses a six-year upward trend.

Coincident with the decrease in average family income, there was an increase in the size of the low income population: the proportion of persons below Statistics Canada's low income cut-offs advanced to 14.6% in 1990 from 13.6% in 1989. There were an estimated 3,821,000 low income persons, up from 3,487,000 in 1989. Children represented 26.5% of the total low income population, an increase of 150,000 children over the previous year.

The decline in real income (inflation adjusted) in 1990 was widespread among various types of families. For families with male heads aged 25 years and under, income fell 10.9% to \$32,387 and for female single-parent families, income decreased 7.3% to \$21,961. Two-parent families with one earner saw their income fall by 6.9% to \$41,129.

Female single-parent families continued to have a low income rate substantially higher than those of other types of families. Their 1990 rate of 60.6% increased from 52.9% in 1989. Families headed by persons under the age of 25 had a low income rate of 38.4%, up from 28.0% in 1989.

For further information, order *Income Distributions by Size in Canada, 1990* (catalogue number 13-207) or contact Household Surveys Division at (613) 951-9775.

Demographic Situation in Canada

Highlights of the 1991 *Report on the Demographic Situation in Canada* include:

- The total increase in the Canadian population in 1989 (14 per 1,000) was second only to that of Australia, which posted the largest gain of all industrialized countries, mainly because of a jump in immigration. However, the growth was

not evenly distributed; for instance, it reached 21 per 1,000 in Alberta and 28 per 1,000 in British Columbia, but for a third consecutive year Saskatchewan's population decreased.

- The fertility rate in Canada is higher than in the European Economic Community overall and only in Great Britain and France is the rate slightly higher. Fertility for Canada as a whole is rising because of an increase in first births.
- Marriages are increasing in Canada mostly because of an increase in first marriages.

(continued on page 5)

... Demographic Situation in Canada

- After three years of data collection, statistics show that AIDS deaths are almost exclusively of males (94%) and that the illness progresses slowly among young people.
- After difficult mid-decade years, Alberta and British Columbia were once again, in 1990, the only provinces to show gains from internal migration, as in the beginning of the 1980s.

- Ontario attracts more new Canadians, from all origins and despite their choice of residence on arrival.

For further information, order Report on the Demographic Situation in Canada, 1991 (catalogue number 91-209E) or contact Demography Division at (613) 951-2327.

University Enrolment Continues to Increase

Preliminary data for the fall of 1991 indicate that the upward trend that has dominated university enrolment for the past 12 years is continuing. Compared to 1990, the number of full-time students attending Canadian universities increased 4.5% to a record high of 556,000.

The preliminary count of part-time students increased as well. This fall, 318,000 students are enrolled, a rise of 3.0%. The increase occurred solely at the undergraduate level (3.8%), while part-time graduate level enrolment decreased 2.6%.

The proportion of students aged 18-24 years registering full-time at university (the participation rate) has increased from 10.0% in 1982 to 15.3% in 1991. In addition, there has been a growing number of mature students registering as well. Full-time students 30 years of age and over now represent 11.0% of all full-time students, up from 8.0% in 1982.

Preliminary Fall Enrolment in Canadian Universities 1991-92

	Undergraduate		Graduate	
	Full-time	Part-time	Full-time	Part-time
Canada	489,325	279,170	66,840	39,210
Newfoundland	12,605	3,925	840	460
Prince Edward Island	2,600	940	35	5
Nova Scotia	26,180	6,895	2,530	1,480
New Brunswick	16,970	5,440	945	465
Quebec	110,000	105,500	19,265	18,640
Ontario	200,045	97,270	25,800	12,140
Manitoba	18,760	15,275	2,275	1,175
Saskatchewan	20,955	8,310	1,535	865
Alberta	44,145	15,525	5,555	1,970
British Columbia	37,060	20,090	8,055	2,015

For further information contact Education, Culture and Tourism Division at (613) 951-1526.

PUBLICATIONS RELEASED FROM DECEMBER 13 TO 19, 1991

Division/title	Period	Catalogue Number	Price: Issue/Subscription		
			Canada (\$Cdn.)	United States	Other Countries
			\$US		
AGRICULTURE					
Agriculture Economic Statistics	December 1991	21-603E	21	25	29.50
Farm Product Price Index	October 1991	62-003	7.10/71	8.50/85	9.90/99
BALANCE OF PAYMENTS					
Canada's International Transactions in Securities	September 1991	67-002	15.80/158	19/190	22.10/221
CURRENT ECONOMIC ANALYSIS					
Canadian Economic Observer	December 1991	11-010	22/220	26/260	31/310
DEMOGRAPHY					
Postcensal Estimates of Families, Canada, Provinces and Territories	June 1, 1991	91-204	17	20	24
EDUCATION, CULTURE AND TOURISM					
Elementary-Secondary School Enrolment	1989-90	81-210	26	31	36
Financial Statistics of Education	1987-88	81-208	39	47	55
Focus on Culture	Winter 1991	87-004	6.25/25	7.50/30	8.75/35
Minority and Second Language Education, Elementary and Secondary Levels	1989-90	81-257	26	31	36
Touriscope - International Travel	October 1991	66-001P	6.10/61	7.30/73	8.50/85
HOUSEHOLD SURVEYS					
Income Distributions by Size in Canada	1990	13-207	40	48	56
The Labour Force	November 1991	71-001	17.90/179	21.50/215	25.10/251
INDUSTRY					
Coal and Coke Statistics	September 1991	45-002	10/100	12/120	14/140
Construction Type Plywood	October 1991	35-001	5/50	6/60	7/70
Electric Lamps	November 1991	43-009	5/50	6/60	7/70
Electric Power Statistics, Vol. III	1990	57-206	27	32	38
Gas Utilities	August 1991	55-002	12.70/127	15.20/152	17.80/178
Monthly Survey of Manufacturing	October 1991	31-001	17.30/173	20.80/208	24.20/242
New Motor Vehicle Sales	May 1991	63-007	14.40/144	17.30/173	20.20/202
Oil Pipe Line Transport	September 1991	55-001	10/100	12/120	14/140
Oils and Fats	October 1991	32-006	5/50	6/60	7/70
Particleboard, Waferboard and Fibreboard	October 1991	36-003	5/50	6/60	7/70
Pulpwood and Wood Residue Statistics	October 1991	25-001	6.10/61	7.30/73	8.50/85
Steel Wire and Specified Wire Products	October 1991	41-006	5/50	6/60	7/70
The Crude Petroleum and Natural Gas Industry	1990	26-213	26	31	36
INTERNATIONAL TRADE					
Exports by Country	January-September 1991	65-003	82.75/331	99.25/397	115.75/463
JUSTICE					
Juristat Service Bulletin - Youth Custody in Canada	Vol. 11, No. 18	85-002	3.60/90	4.30/108	5/126
LABOUR					
Employment, Earnings and Hours	September 1991	72-002	38.50/385	46.20/462	53.90/539
PRICES					
Farm Input Price Index	Third Quarter 1991	62-004	12.25/49	14.75/59	17.25/69
TRANSPORTATION					
Railway Carloadings	October 1991	52-001	8.30/83	10/100	11.60/116
Service Bulletin - Surface and Marine Transport	Vol. 7, No. 6	50-002	9.40/75	11.25/90	13.15/105

NEW FROM STATISTICS CANADA



The Canadian Economic Observer December 1991

The December issue of the *Canadian Economic Observer*, Statistics Canada's flagship publication for economic statistics, is now available.

The December issue contains a monthly summary of the economy, major economic and statistical events in November, the third quarter national accounts, and a feature article on new survey estimates of capacity utilization. A statistical summary contains a wide range of tables and graphs on the principal economic indicators for Canada, the provinces and major industrial nations.

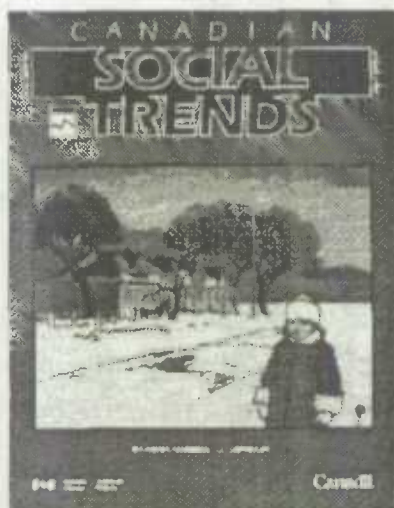
The *Canadian Economic Observer* (11-010, \$22/\$220) can now be ordered from Publication Sales (613-951-7277). For more information, call Francine Roy (613-951-3627), Current Analysis Section

School Leavers Survey

The **School Leavers Survey** explores the environmental, social, attitudinal, personal and economic factors that may contribute to the early departure of students from school. The survey was conducted by Statistics Canada between April and June 1991 under a contract from Employment and Immigration Canada. A sample of 9,460 youths completed questionnaires.

- When asked to focus on the *most important reason* for leaving school, slightly over one in five students reported that they preferred working to attending classes, and almost the same number reported being "bored".
- Approximately one of every two youths reported they were not happy that they had left school before completing their high school education.
- Estimates based on responses from youths who were 20-years-old in April 1991 indicate that nearly 24% of such students had left school at some time during their school career.

An information package containing highlights of some of the early results from the survey, focusing on why students leave, their satisfaction with leaving, their employment status, the likelihood of their returning to school and the overall distribution of school leavers by gender and by province is available from Doug Higgins (613-951-5870), Education, Culture and Tourism Division.



Canadian Social Trends

The Winter 1991 issue of *Canadian Social Trends* examines trends in Canadian society. Highlighted is Canada's off-reserve Aboriginal population. While the characteristics of Aboriginal people who live on reserve are reasonably well documented, there is a growing number that live off reserve about whom relatively little is known.

This issue of *Canadian Social Trends* also features articles on the changing occupational structure. Some occupations common at the turn of the century have all but disappeared, to be replaced by those in informatics and high-tech industries.

An article on AIDS in the 1990s notes that as of August 6, 1991, 368,600 cases of AIDS had been reported to the World Health Organization. Of these cases 1% of all reported cases were in Canada. Also, as a companion article on this topic, there is an article on AIDS: Knowledge, Attitudes and Behaviours in Alberta.

The Winter issue of *Canadian Social Trends* (11-008E, \$8.50/\$34) is now available. To order, call Publications Sales (613) 951-7276 or the toll-free number 1-800-267-6677. Further information is available from the editors (613-951-2560).

CURRENT TRENDS

Gross Domestic Product

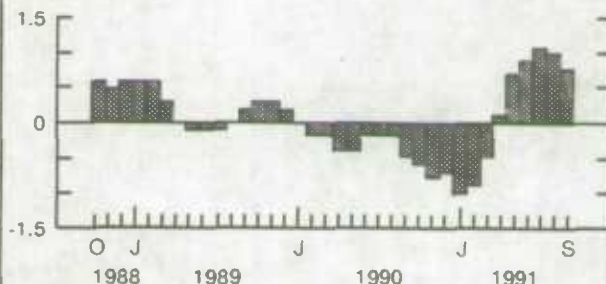
% change,
previous month



GDP at factor cost slipped 0.1% in September. Service-producing industries posted a 0.3% decrease but goods-producing industries advanced 0.4%.

Composite Leading Indicator

% change,
previous month



The composite leading indicator continued to advance in September, rising 0.8%, the sixth straight monthly increase.

Consumer Price Index

% change,
previous year



In October, the all-items CPI fell 0.2%, similar to the drop posted in September, and the food index continued to decline (-0.8%).

Unemployment Rate

%



The unemployment rate remained at 10.3 in November, unchanged from the level observed in October.

Manufacturing

Billions
of dollars



Canadian manufacturers' shipments fell by 1.5% to \$23.0 billion in October but unfilled orders edged up 0.1% to \$24.0 billion.

Merchandise Trade

Billions
of dollars



Slightly increased exports and reduced imports caused Canada's trade balance to change from a deficit of \$286 million in September to a surplus of \$69 million in October.

Note: All series are seasonally adjusted except the consumer price index.

LATEST MONTHLY STATISTICS

	Period	Level	Change Previous Period	Change Previous Year
GENERAL				
Gross Domestic Product (\$ billion, 1986)	September	505	-0.1%	0.1%
Composite Leading Indicator (1981 = 100)	September	142.9	0.8%	0.2%
Profits of Industrial Corporations (\$ billion)	3rd Quarter	13.0	10.0%	-22.2%
DOMESTIC DEMAND				
Retail Trade (\$ billion)	September	15.0	0.8%	-5.6%
New Motor Vehicle Sales ('000 units)	October	92.1	-19.8%	-8.4%
LABOUR				
Employment (millions)	November	12.3	-0.4%	-1.2%
Unemployment Rate (%)	November	10.3	0.0	1.2
Participation Rate (%)	November	66.0	-0.3	-0.8
Labour Income (\$ billion)	September	32.6	0.0%	4.0%
Average Weekly Earnings (\$)	September	544.92	-0.3%	4.7%
INTERNATIONAL TRADE				
Merchandise Exports (\$ billion)	October*	11.7	0.3%	-6.1%
Merchandise Imports (\$ billion)	October*	11.6	-2.7%	4.0%
Merchandise Trade Balance (\$ billion)	October*	0.07	0.36	-1.0
MANUFACTURING				
Shipments (\$ billion)	October*	23.0	-1.5%	-7.0%
New Orders (\$ billion)	October*	23.1	-0.8%	-5.9%
Unfilled Orders (\$ billion)	October*	24.0	0.1%	-10.0%
Inventory/ Shipments Ratio	October*	1.51	0.01	-0.03
Capacity Utilization (%)	3rd Quarter	72.0	1.4	-6.4
PRICES				
Consumer Price Index (1986 = 100)	October	126.5	-0.2%	4.4%
Industrial Product Price Index (1986 = 100)	October	107.6	0.0%	-2.7%
Raw Materials Price Index (1986 = 100)	October	102.6	0.0%	-17.7%
New Housing Price Index (1986 = 100)	October	134.4	0.0%	-4.1%

Note: All series are seasonally adjusted with the exception of average weekly earnings and the price indexes.

* *New this week.*

I·N·F·O·M·A·T

A Weekly Review

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