



Infommat

A Weekly Review

Friday, August 20, 1999

OVERVIEW

◆ Trucks pull new vehicle sales higher

After falling in May, new vehicle sales rose 1.8% in June. Truck sales accounted for more than two-thirds of June's sales increase.

◆ Composite index shows slower growth

In July, the growth of the leading indicator slowed to 0.1%—its smallest gain since last November. The main brake on growth was softer demand for durable goods.

◆ Oil and gas drillers were very active in 1997

The contract drilling industry reported significant increases in activity, operating revenues and employment in 1997. This reflected higher prices for crude oil and natural gas, as well as greater exports to the United States.

◆ Adults return to school to stay competitive

A large number of adults invested in education and training activities in 1997 after completing their initial education. Mainly, they did so as a means to remain competitive in the labour market.

◆ Registrations on the rise in apprenticeship programs

Total registrations in apprenticeship programs have increased since 1987 and appear to be recovering from the economic slump in the early 1990s.

◆ Family income after tax essentially unchanged

In 1997, for a third consecutive year, family income after tax remained essentially unchanged (\$45,605) after adjusting for inflation. The average has generally been declining since it peaked in 1989 at \$48,311.

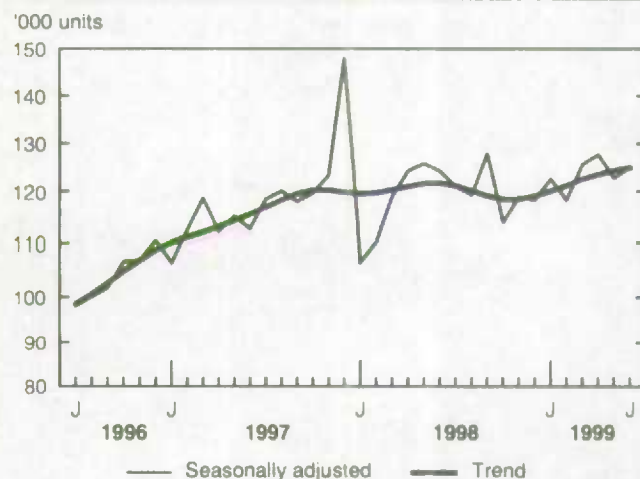
Trucks pull new vehicle sales higher

Automakers increased their sales from May to June by 1.8%, selling 124,979 vehicles. This increase followed May's drop of 3.8%. Comparing this June with June 1998, new vehicle sales advanced 0.6%. Vehicle sales have been tracing an upward trend since the fall of 1998. This uptrend follows a period of relatively stable sales levels, punctuated by some large fluctuations.

Truck sales accounted for more than two-thirds of June's increase in new vehicle sales. After decreasing in both April and May, truck sales rose 2.8% in June to 60,636 trucks. Compared with June 1998, truck sales were up a slight 0.3%. Truck sales, which have been on the rise since the start of this year, generally declined during the second half of last year. Car sales, meanwhile, rose in June by 1.0% to 64,342 cars. The increase followed a 5.0% drop in May.

Sales of North American-built cars advanced 0.9%. June's advance followed a decline of 6.8% in May. Sales of North American-built cars have been on the decline since the spring of

New motor vehicle sales



(continued on page 2)



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... Trucks pull new vehicle sales higher

1997; however, they have been recovering slightly since last fall. Imported cars, meanwhile, gained sales in June (+1.2%). It was the fourth straight monthly increase. Sales of imported cars have been rising since the spring of 1997.

Of all the new vehicles sold in June, 84.6% of them were North American-built vehicles. That is down from their 88.4% market share a year earlier (data not adjusted for seasonality). More specifically, the market share of North American-built cars fell from 84.5% to 77.3%. The market share for North American-built trucks remained almost unchanged, edging up from 92.9% to 93.0%.

Unadjusted for seasonality, new vehicle sales advanced from June 1998 to June 1999 by 2.7%. At the provincial level, vehicle sales varied considerably. Dealers in Newfoundland posted the greatest yearly gain (+20.0%) on higher sales for both cars (+25.3%) and trucks (+13.2%). Sales of new vehicles increased 8.6% in both Ontario and Nova Scotia, 3.4% in British Columbia, 2.9% in Manitoba and 2.4% in New Brunswick. Vehicle sales fell in four provinces: Saskatchewan (-11.2%), Alberta (-10.5%), Prince Edward Island (-6.6%) and Quebec (-1.4%).

Available on CANSIM: *matrix 64*.

Composite index shows slower growth

In July, the growth of the leading indicator slowed from 0.2% (June) to 0.1%—its smallest gain since last November. The main brake on growth in July was softer demand for durable goods. Only two components were down in July, compared with three in June.

Following nine months of solid gains, new orders levelled off in the face of slack consumer and export demand for durables. Conversely, shipments of non-durable goods continued to grow strongly, and that, together with falling inventories, has kept the overall ratio of shipments to inventories rising at a steady clip since the start of the year. Meanwhile, the average workweek pulled out of a two-month drop.

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.

The June 1999 issue of *New motor vehicle sales* (63-007-XIB, \$13/\$124) can be downloaded from the Internet at www.statcan.ca. To order data, or for general information, contact Client Services (613-951-3549; 1 877 421-3067; retailinfo@statcan.ca), Distributive Trades Division. For analytical information, contact Cl  rance Kimanyi (613-951-3592; kimacle@statcan.ca), Distributive Trades Division.

Household demand remained mixed. A slump in auto sales stopped a six-month stretch of increases in overall demand for durable goods. Furniture and appliance sales accelerated, however, since the housing market has picked up in recent months. In July, the housing index was up 1.3%. This was the housing index's fifth straight increase—its longest period of growth since early 1997.

In the United States, their leading indicator continued along its steady growth path. The components related to household demand accelerated in line with improving incomes south of the border. This, along with the recovery in commodity prices, is an encouraging trend for Canada's exporters.

Available on CANSIM: *matrix 191*.

The August 1999 issue of *Canadian economic observer* (11-010-XPB, \$23/\$227) is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. See also "Current trends" on page 8.

Oil and gas drillers were very active in 1997

The oil and gas contract drilling industry reported significant increases in activity, operating revenues and employment in 1997 (the latest annual data). This reflected higher prices for crude oil and natural gas, as well as greater exports to the United States, which were spurred by the lower Canadian dollar. The industry reported total revenues that year of \$2.6 billion, up from 1996 by 63%. Drilling activity in Alberta accounted for 58% (or \$1.5 billion) of 1997 revenues, while Saskatchewan's share climbed to 28% (to \$733 million), compared with 17% in 1996. Revenues of drillers in British Columbia reached \$220 million in 1997.

The drilling industry's operating expenses in 1997 totalled \$2.1 billion, up from 1996 by 61%. Wages and salaries were the largest single expense item, amounting to \$951.6 million. Wages and salaries accounted for 44% of the drillers' total operating expenses. Salaries paid to contract drilling employees in Alberta accounted for one-quarter of the industry's total expenses. Saskatchewan's increase in 1997 revenues was also reflected in a significant increase in wages and salaries paid to contract drilling employees in that province.

The oil and gas drilling industry invested \$305 million in capital projects in 1997, a 30% increase from the 1996 total of \$235 million. Virtually all (99%) of that new capital spending was directed toward purchasing machinery and equipment.

Employment statistics of the oil/gas contract drilling industry

	Wages and salaries		Full-time employees	
	1996	1997	1996	1997
	\$ millions		Persons	
Canada	588.4	951.6	12,641	24,191
Saskatchewan	88.1	270.7	1,884	7,823
Alberta	434.0	546.3	9,250	13,088
British Columbia	45.8	80.9	1,037	2,366
Other regions	20.6	53.7	470	914

The number of full-time employees in the contract drilling industry swelled from 1996 to 1997 by almost 50%, up to 24,191 persons. Almost all (95%) worked in the operations end of the industry. In Alberta, the number of drilling employees surged by 41% to 13,088. Moreover, 54% of all drilling employees in 1997 worked in Alberta. In Saskatchewan, the contract drilling industry employed 7,823 persons full time in 1997—more than a four-fold increase compared with 1,884 in 1996.

For further information, contact Gary Smalldridge (613-951-3567; smalgar@statcan.ca), Energy Section, Manufacturing, Construction and Energy Division.

Adults return to school to stay competitive

In 1997, more than 6 million people, or 28% of the adult population, participated in adult education and training activities after completing their initial education. Age and level of educational attainment continue to be important factors underlying the decision to participate in such activities. The percentages of adults enrolled in such activities in 1997 ranged from 5% for those over age 65 to 39% for those in the 17-to-34 age group. Among university graduates, 48% participated in adult education and training in 1997, whereas only 11% of those with less than a high-school diploma did so.

Mainly, Canadians invest in continuing education as a means to remain competitive in the labour market. Three out of four adults who participated in an education or training activity in 1997 (representing 21% of the adult population) reported doing so for job-related reasons, whereas 10% of the adult population

Note to readers

These data come from the Adult Education and Training Survey, which was conducted with the financial support of Human Resources Development Canada in January 1998. The survey collected data on participants in adult education and training activities taken during 1997. In this analysis, adult education is defined as organized, structured programs of education offered full time or part time by public or private institutions, employers or any other providers. The adult population is defined here as people 17 years of age and older.

participated in such training to pursue personal interests (or leisure). Of the employed population, 24% were enrolled in job-related education or training activities sponsored by their employer.

Among the labour force population, 29% of the employed and 20% of the unemployed participated in job-related adult education and training activities, whereas only 6% of those not in the labour force did the same. Among the employed, 32% of paid workers participated in job-related adult education and training, compared with 18% of self-employed workers.

A microdata file of results from the 1998 Adult Education and Training Survey is now available. Statistics Canada and Human Resource Development Canada will jointly issue an analytical report this fall. For further information concerning the survey results and related products and services, contact Client Services (613-951-7355 or 1 888 297-7355, fax: 613-951-3012, ssd@statcan.ca), Special Surveys Division, or Robert Couillard (613-951-1519, fax: 613-951-9040, couirob@statcan.ca), Centre for Education Statistics.

Participation in adult education and training by level of prior educational attainment, 1997

	Total	Men	Women
	% of adult population		
Total	28	27	29
Some secondary or less	11	12	10
High school diploma	22	22	21
Post-secondary non-university	34	32	36
University degree	48	44	53

Registrations on the rise in apprenticeship programs

From 1987 to 1997, the number of registered apprentices climbed 9.9% to 172,342. However, the number of apprentices completing programs in 1997 was 5.1% lower than in 1987. The increase in apprenticeship program registrations indicates that these programs are recovering from the economic slump that occurred in the early 1990s.

Although women are still predominantly choosing apprenticeships in the food and service trades, they have made major advances in several of the other major trade groups. These advances may reflect the success of several initiatives aimed at encouraging women to enter trade and technical programs.

Economic recessions have the effect of suddenly decreasing total apprenticeship registrations, which then rise again when economic conditions improve. Apprenticeship completions show a different pattern. Completions do not fall off as quickly as registrations, but they may remain affected by a recession longer. In other words, recessions further lengthen the sometimes already extended period of time it takes apprentices to complete their programs.

For further information, contact Karl Skof (613-951-1529, fax: 613-951-6765, skofkar@statcan.ca) or Bernard Bourgoin (613-951-1506, fax: 613-951-6765, bourber@statcan.ca), Centre for Education Statistics.

Percentage changes in registered apprenticeship training, 1987 to 1997

	Registrations		Completions	
	Men	Women	Men	Women
	% change			
All major trade groups	7.4	52.4	-4.5	-9.5
Building and construction trades	-17.7	169.9	-35.1	73.7
Electrical, electronics and related	5.7	119.0	13.7	37.5
Food and service trades	49.7	40.5	11.5	-10.6
Industrial and mechanical trades	46.4	269.5	11.7	160.0
Metal fabricating trades	10.9	91.1	15.1	57.9
Motor vehicle and heavy equipment	15.8	86.4	-13.5	46.7
Other trades	28.9	41.1	-18.7	-56.6

Family income after tax essentially unchanged

In 1997, family income after tax averaged \$45,605. That was about 6% less than in 1989, the year when the average peaked at \$48,311. Transfer payments in 1997 averaged \$6,474, 10% lower than the peak in 1993, while the average income tax was \$11,541, down slightly from the high in 1996.

Most (90%) of income before transfers comes from earnings, so changes in pre-transfer income are driven by changes in rates of pay and labour-market conditions. In 1997, employment grew 1.9%, while average weekly hours increased 0.5% to 37.9 hours and average weekly earnings rose just 0.5%. As a result, families saw only modest gains in earnings. At the same time, government transfers declined slightly as the trend to lower transfers continued. These offsets meant that average total income was essentially unchanged in 1997. As a result, the average income tax paid was little changed as well.

Transfers and taxes narrow the income differences between those at the top and those at the bottom of the income scale. Before taxes and transfers, the families in the highest quintile (the 20% of families with highest incomes) had \$21 of income for every \$1 received by those in the bottom quintile. After taxes and transfers, this gap was reduced to \$5 for every \$1. The average

Note to readers

These data came from the Survey of Consumer Finances. The sample of 35,000 households excluded households in the territories and on Indian reserves. Dollar amounts and percentages are in constant 1997 dollars.

Family income after tax employs the "economic family" concept, which consists of individuals sharing a common dwelling and who are related by blood, marriage (including common-law relationships) or adoption. The data presented here refer to families of two or more persons and exclude unattached individuals.

After-tax income is the sum of government transfer payments (such as Old Age Security, Canada/Quebec Pension Plan benefits, Child Tax Benefits, Social Assistance and Employment Insurance benefits) and income before transfers (mainly from work, investment and private pensions) minus income taxes.

The income redistribution referred to here does not reflect all the taxes and other payments made by individuals to governments, nor does it reflect all the benefits that people receive from governments.

(continued on page 5)

... Family income after tax essentially unchanged

1997 income for families in the lowest quintile was \$16,876 after taxes and transfers, more than triple their \$5,367 income before transfers. For the highest income families, on the other hand, their pre-tax, pre-transfer average of \$112,129 was reduced by taxes down to \$85,516. Taxes and transfers also reduce the income disparity among family types. Generally speaking, two-parent families, who on average have relatively high pre-transfer income, pay more in taxes and receive a comparatively low amount in transfers.

Transfers payments declined for a fourth consecutive year in 1997 and were 4% lower than in 1996 at \$6,474. Payments of Social Assistance and Employment Insurance declined again in 1997. For the first time since 1980, average transfers fell for families in all quintiles—including the lowest. Average transfers peaked in 1993, when labour-market conditions were unfavourable, and they have been steadily declining since. Transfer payments represented 11.3% of family income in 1997, down from the 12.9% peak in 1993. However, the 1993-to-1997 reductions followed five years of increases.

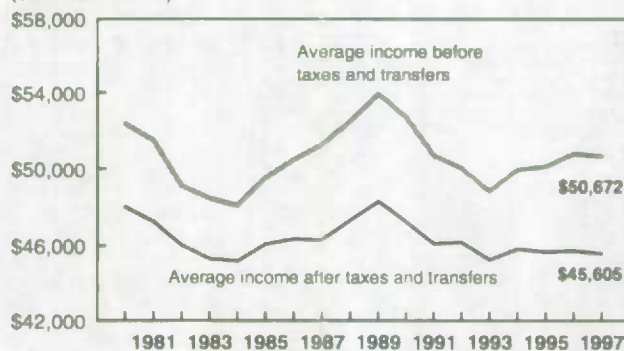
Labour-market factors clearly affect the trend in transfers, but demographic factors are also influential. The share of the population that is senior has been increasing throughout the 1980s and 1990s. As more people reach retirement age and leave the workforce, they begin receiving Old Age Security and Canada/Quebec Pension Plan benefits. Consequently, the proportion of income from these two sources has been rising steadily, and that reinforces the overall increase in transfers seen during recessions and tempers the decline in transfers during recoveries. This partly explains why the 1997 proportion of income from transfers was still higher than at any time during the 1980s, despite the recent reductions in other transfers.

The average income tax paid by families in 1997 (\$11,541) represented 20.2% of total family income, virtually the same as the peak reached in 1996. The absence of a significant change reflects the fact that total family income was essentially unchanged in 1997. Income taxes had been following an upward trend (an average increase of \$336 per year between 1993 and 1996), mainly due to growth in earnings, as employment recovered from the losses of the last recession. As well, income tax brackets that are not adjusted for inflation have also been contributing to that upward trend. For families in the lowest income quintiles, taxes took an average 3.1% of income in 1997, reflecting higher earnings. Families in the highest paid on average 26.0%, down slightly from 26.7% in 1996, due partly to a decline in their average earnings.

After-tax inequality has remained stable despite the economic swings of the 1980s and 1990s. The pre-transfer income gap

Family income

(\$ constant 1997)



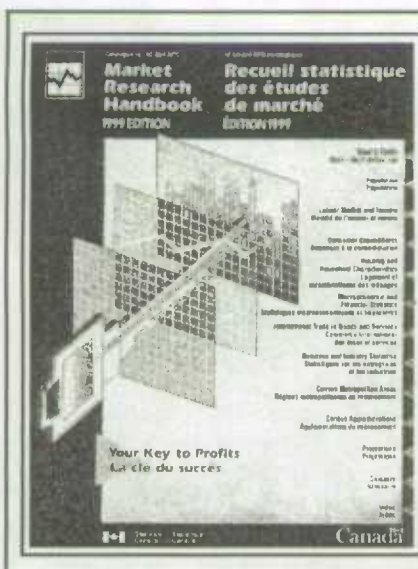
between high- and low-income families grew significantly during the two most recent economic downturns. Lower income families were hit hardest by declining earnings from job losses during the recessions of the early 1980s and 1990s. Between 1980 and 1984, families in the lowest quintile experienced a 22% drop in pre-transfer income, whereas those in the highest saw a decline of only 3%. Between 1989 and 1993, the decreases were 27% and 6%, respectively.

During both of the subsequent recoveries, the pre-transfer income gap narrowed, as families in the lowest quintile recorded the largest percentage increase in earnings. Between 1984 and 1989, the lowest quintile families saw their pre-transfer income climb 32%, whereas those in the highest made an 11% gain. From 1993 to 1997, the gains were more modest at 10% and 3%, respectively.

After taxes and transfers, however, the picture is quite different. The inequality that exists in after-tax income is longstanding and stable, essentially due to the combined impact of transfers and taxes.

*The full report, **Income after tax, distributions by size in Canada, 1997** (13-210-XPB, \$31) is now available, as is a related report, **Low income after tax, 1997** (13-592-X1B, \$30). Data on average income, income tax and transfer payments are also available at no charge on Statistics Canada's Web site (www.statcan.ca). Look under "Canadian statistics", followed by "The people - families, households and housing", then "Income". A range of other products and services related to these data can be ordered. For further information, contact Client Services (613-951-7355 or 1 888 297-7355; fax: 613 951-3012; income@statcan.ca), Income Statistics Division.*

New from Statistics Canada



Market research handbook 1999

Since 1975, the *Market research handbook* has been an authoritative source of socio-economic information by presenting the key characteristics of local and national markets in Canada. These statistics on the changing demographics, standards of living and economic characteristics of Canadian society can help businesses locate target markets, track market share and assess competitive position.

The 1999 edition relies on the latest data from the 1996 Census and a wide range of surveys. A number of features in the new edition make it friendlier. These include a user guide, annotated charts to reveal salient trends, help lines for each of the data sources, and references to CANSIM, Statistics Canada's online database.

The Market research handbook (63-224-XPB, \$125) is now available. For further information, contact Serge Bourret (613-951-0821), Small Business and Special Surveys Division.

Family income 1997

These data for *Family income 1997* were derived from income tax returns filed in the spring of 1998. For that reason, it is an unparalleled source of information on family income in Canada. What follows is just a sample of what can be gleaned from this database.

The median total income of husband-wife families advanced from 1996 to 1997 by less than 1% to \$50,800, after adjusting for inflation; the median total income of lone-parent families was \$21,300, up 1.3%. Among the provinces and territories, the highest median income for husband-wife families was in the Northwest Territories, excluding Nunavut (\$72,200), followed by the Yukon (\$60,200) and Ontario (\$55,300). In husband-wife families with employment income in 1997, both husband and wife were earning income in almost 70% of these families. A full 85% of families received some government transfer income in 1997. Of the total government transfers of \$75.8 billion, husband-wife families received \$42.7 billion, while lone-parent families received \$9.1 billion. Most (83%) husband-wife families also reported some government income assistance in 1997, with the largest proportion coming from CPP/QPP payments (29%) followed by Old Age Security (24%). Meanwhile, almost all lone-parent families (97.5%) reported income from government transfers, most of it from Social Assistance (39%).

The data for Family income (13C0016) are available for Canada, the provinces and territories, cities, towns, census metropolitan areas, census divisions, and for areas as small as urban forward sortations (the first three characters of the postal code) and letter carrier routes. To order, or for further information, contact Client Services (613-951-9720, fax: 613-951-4745, saadinfo@statcan.ca), Small Area and Administrative Data Division.

New from Statistics Canada

Neighbourhood income and demographics 1997

The data for *Neighbourhood income and demographics 1997* were obtained from income tax returns filed in the spring of 1998. These data show that the median total income of individuals in Canada remained virtually unchanged from 1996 to 1997, after adjusting for inflation, at \$19,400. (Median income is the middle point at which half of the incomes are above and half below.)

This database also reveals that taxfilers in the Northwest Territories (excluding Nunavut), the Yukon, Ontario, Alberta and British Columbia had median total incomes that were above the national median. The Northwest Territories was at the top at \$25,800, followed by the Yukon at \$24,600.

To learn more about this subject, consult the data for Neighbourhood income and demographics (13C0015). These data are available for Canada, the provinces and territories, cities, towns, census metropolitan areas, census divisions, and for areas as small as urban forward sortations (the first three characters of the postal code) and letter carrier routes. To order, or for further information, contact Client Services (613-951-9720, fax: 613-951-4745, saadinfo@statcan.ca), Small Area and Administrative Data Division.

Seniors' income 1997

The 1997 data on *Seniors' income* are derived from income tax returns filed in the spring of 1998. They show that the 1997 median total income of seniors aged 65 and over was \$16,000. Although that was up from 1996 by \$100, the increase was less than what was required to keep pace with consumer price inflation. (Median income is the middle point at which half the incomes are above and half are below.)

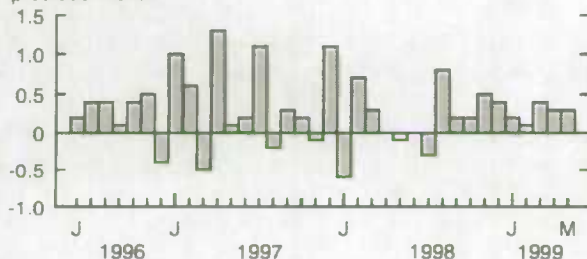
The median total incomes of seniors in Ontario, British Columbia and Alberta were equal to or greater than the national level. The median total income of all seniors was lower than the \$21,500 of near-seniors (those aged 55 to 64). And only for near-seniors did the annual increase in median income from 1996 to 1997 surpass the rate of inflation. In 1997, about 12% of seniors had Registered Retirement Savings Plan (RRSP) income. These are just some of the findings that can be gleaned from this databank on seniors' income.

The data on Seniors' income (89C0022) are available for Canada, the provinces and territories, and for areas as small as an urban forward sortation (the first three characters of a postal code) and a letter carrier route. To order, or for further information, contact Client Services (613-951-9720, fax: 613-951-4745, saadinfo@statcan.ca), Small Area and Administrative Data Division.

Current trends

Gross domestic product

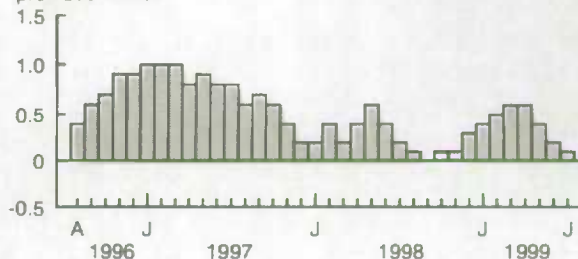
% change,
previous month



Economic activity continued to advance in May (+0.3%). This extended the expansion to 10 months – the longest uninterrupted string of advances in more than a decade.

Composite Index

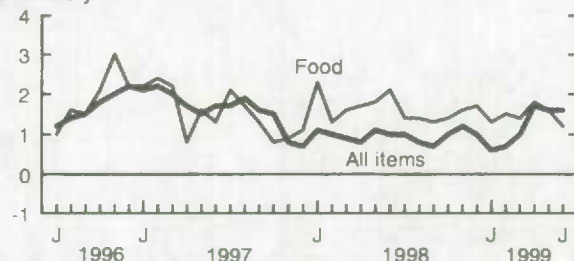
% change,
previous month



The growth of the leading indicator slowed to 0.1% in July, marking its smallest gain since last November.

Consumer Price Index

% change,
previous year



Consumers paid 1.6% more for goods and services in June 1999 than they did a year earlier. Food prices rose 1.2%.

Unemployment rate

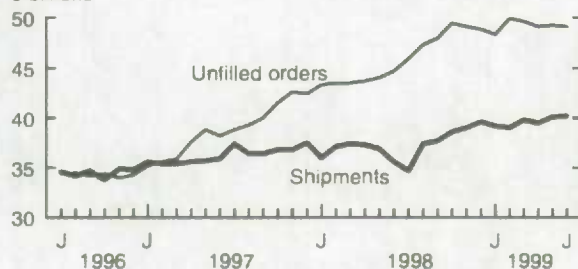
%



In July, an increase in the number of people looking for work, mostly among youths, pushed the unemployment rate up 0.1 percentage points to 7.7%.

Manufacturing

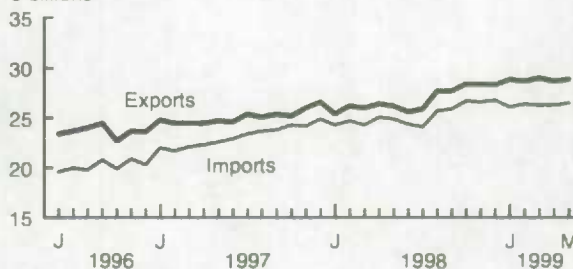
\$ billions



Manufacturers' shipments grew 0.4% in June to \$40.2 billion. The backlog of unfilled orders dropped 0.2% to \$49.1 billion.

Merchandise trade

\$ billions



In May, the value of merchandise exports rose 0.5% from April to \$28.9 billion. Imports remained virtually unchanged (+0.1%) for a third consecutive month at \$26.5 billion.

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	737.6	0.3%	3.1%
Composite Index (1981=100)	July*	215.0	0.1%	3.8%
Operating profits of enterprises (\$ billion)	Q1 1999	36.3	4.7%	..
Capacity utilization (%)	Q1 1999	83.1	0.5†	- 0.3†
DOMESTIC DEMAND				
Retail trade (\$ billion)	May	21.3	0.4%	3.4%
New motor vehicle sales (thousand of units)	June*	125.0	0.6%	1.8%
Wholesale trade (\$ billion)	May	29.8	1.8%	5.7%
LABOUR				
Employment (millions)	July	14.68	0.3%	2.7%
Unemployment rate (%)	July	7.7	0.1†	- 0.7†
Participation rate (%)	July	65.4	0.1†	0.4†
Average weekly earnings (\$)	May	607.39	0.0%	0.5%
Help-wanted Index (1996=100)	July	160	0.6%	11.9%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	May	28.9	0.5%	10.1%
Merchandise imports (\$ billion)	May	26.5	0.1%	6.1%
Merchandise trade balance (all figures in \$ billion)	May	2.4	0.1	1.1
MANUFACTURING				
Shipments (\$ billion)	June*	40.3	0.4%	13.1%
New orders (\$ billion)	June*	40.1	- 0.1%	10.4%
Unfilled orders (\$ billion)	June*	49.1	- 0.2%	9.8%
Inventory/shipments ratio	June*	1.26	0.00	- 0.12
PRICES				
Consumer Price Index (1992=100)	July*	110.8	0.3%	1.8%
Industrial Product Price Index (1992=100)	June	120.2	0.1%	0.8%
Raw Materials Price Index (1992=100)	June	112.9	- 0.5%	5.4%
New Housing Price Index (1992=100)	June	100.6	0.0%	0.5%

Note: All series are seasonally adjusted with the exception of the price indexes.

* new this week

† percentage point

.. figures not available yet due to a survey redesign

Infomat

A weekly review

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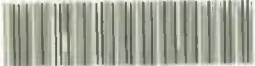
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