



The Daily

Statistics Canada

Tuesday, January 17, 1995

For release at 8:30 a.m.

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MAJOR RELEASES

- **Composite index, December 1994** 2
 A 0.6% gain in the leading indicator in December was about the same as its average gain since September after having slowed generally throughout most of the year.
- **Travel between Canada and other countries, November 1994** 4
 Foreigners made 1.4 million overnight trips to Canada in November, the largest number in six years.

OTHER RELEASES

- Department store sales, November 1994 7
- Oil pipeline transport, October 1994 8
- Dairy review, November 1994 8

PUBLICATION RELEASED 9



MAJOR RELEASES

Composite index

December 1994

A 0.6% gain in the leading indicator in December was about the same as its average gain since September after having slowed generally throughout most of the year. The modest but steady growth in the index is in line with the slow growth of production in recent months. Business demand continued to be an important source of growth, while households remained hesitant to spend.

Business investment continued to bolster manufacturing. New orders for durable goods remained positive, especially for capital and industrial goods. Shipments also marched ahead, while inventories were run down as firms struggled to keep up with demand. The ratio of shipments to inventories of finished goods has risen 11 points in four months, the sharpest increase since late 1983. As well, employment in manufacturing at the end of 1994 was rising at its fastest clip since 1983. These gains followed nearly a year of solid growth in business demand for services.

Households stayed cautious about making large purchases. The housing index reflected this most, tumbling rapidly as housing starts in December sank to their lowest level in three years. Elsewhere, consumer demand was mixed. Outlays for furniture and automotive goods levelled off but remained weak.

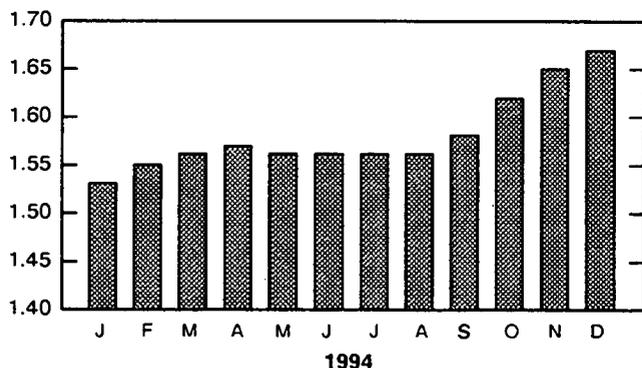
The growth of the U.S. leading indicator slowed again, to 0.1%, in line with the slower trend of Canada's exports south of the border. Gains were concentrated more in the manufacturing sector, particularly in orders for investment goods—which rose to their highest level since data collection began in the 1950s. Capital spending has been the driving force behind the growth in the United States in the past year.

Available on CANSIM: matrix 191.

For further information on the economy, the January 1995 issue of *Canadian economic observer* (11-010, \$22/\$220) will be available this week. See "How to order publications".

For further information on this release, contact Francine Roy (613-951-3627), Current Economic Analysis Division. □

Ratio of shipments to inventories, manufacturing



Composite index

| Data used in the composite index calculation for: | July 1994 | August 1994 | September 1994 | October 1994 | November 1994 | December 1994 | Last month of data available |
|--|--------------|--------------|----------------|--------------|---------------|---------------|------------------------------|
| | | | | | | | % change |
| Composite leading indicator (1981 = 100) | 167.1 | 167.8 | 168.7 | 169.8 | 170.7 | 171.7 | 0.6 |
| Housing index ¹ | 127.7 | 125.2 | 122.8 | 120.7 | 119.2 | 116.7 | -2.1 |
| Business and personal services employment (thousands) | 1,871 | 1,884 | 1,898 | 1,909 | 1,920 | 1,929 | 0.5 |
| TSE 300 stock price index (1975 = 1,000) | 4,286 | 4,264 | 4,264 | 4,267 | 4,246 | 4,229 | -0.4 |
| Money supply (M1) (millions of 1981 \$) ² | 30,136 | 30,271 | 30,336 | 30,352 | 30,415 | 30,508 | 0.3 |
| U.S. composite leading index (1967 = 100) ³ | 214.9 | 215.4 | 215.9 | 216.3 | 216.7 | 217.0 | 0.1 |
| Manufacturing | | | | | | | |
| Average work week | 38.8 | 38.8 | 38.8 | 38.9 | 38.9 | 38.9 | 0.0 |
| New orders, durables (millions of 1981 \$) ⁴ | 10,968.2 | 11,100.6 | 11,284.2 | 11,511.0 | 11,733.0 | 11,932.0 | 1.7 |
| Shipments/inventories of finished goods ratio ⁴ | 1.56 | 1.56 | 1.58 | 1.62 | 1.65 | 1.67 | 0.02* |
| Retail trade | | | | | | | |
| Furniture and appliance sales (millions of 1981 \$) ⁴ | 1,121.7 | 1,126.8 | 1,131.2 | 1,133.6 | 1,132.1 | 1,135.8 | 0.3 |
| Other durable goods sales (millions of 1981 \$) ⁴ | 3,951.8 | 3,991.0 | 3,991.0 | 3,969.8 | 3,959.7 | 3,964.9 | 0.1 |
| Unsmoothed composite | 168.4 | 169.5 | 171.5 | 172.2 | 172.3 | 173.9 | 0.9 |

¹ Composite index of housing starts (units) and house sales (MLS).

² Deflated by the consumer price index for all items.

³ The figures in this row reflect data published in the month indicated but the figures themselves refer to data for the month immediately preceding.

⁴ The figures in this row reflect data published in the month indicated but the figures themselves refer to data for the two preceding months.

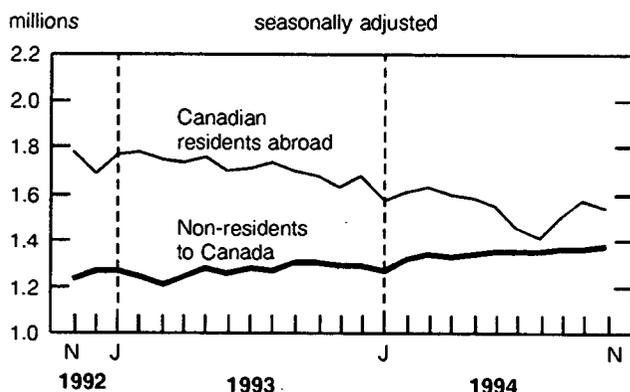
* Difference from previous month. ■

Travel between Canada and other countries

November 1994

Overnight trips to Canada by U.S. residents and by overseas residents both show an increasing trend. Foreigners made 1.4 million overnight trips in November, up 0.7% from October and the most since November 1988. This type of travel has been increasing since August 1992, after having been relatively constant between late 1986 and mid-1992.

Overnight trips to Canada by non-residents reach highest level in six years



The largest proportion of foreign visitors to Canada are U.S. residents—78% of foreign overnight visitors in November. This proportion has been gradually decreasing; it stood at nearly 95% in 1972.

Since overseas residents tend to make longer trips to Canada than residents of the United States, this shift in the proportions is important. Because of their typically longer trips, overseas residents spent an average of C\$914 per overnight trip in 1993, compared with C\$343 for residents of the United States.

Note to users

Month-to-month comparisons use seasonally adjusted data (data adjusted for variations that repeat annually and for variability caused by the different volumes of travellers associated with different days of the week).

Year-over-year comparisons use unadjusted data (the actual traffic counts).

Increased spending by visitors to Canada and decreased spending by Canadians outside the country have combined to improve Canada's international travel account deficit. During the third quarter of 1994, the smallest travel account deficit (\$1.4 billion, seasonally adjusted) was recorded since the fourth quarter of 1989.

U.S. residents made 1.1 million overnight trips to Canada in November, up 1.0% from October. Overnight trips to Canada by residents of overseas countries totalled 302,000, nearly unchanged from October's record (seasonally adjusted). Overnight visits from a number of countries were up from November 1993, including Japan (+20.9% to 22,000), Germany (+22.0% to 12,000) and Australia (+24.4% to 6,000).

Canadians are making fewer overnight trips to the United States

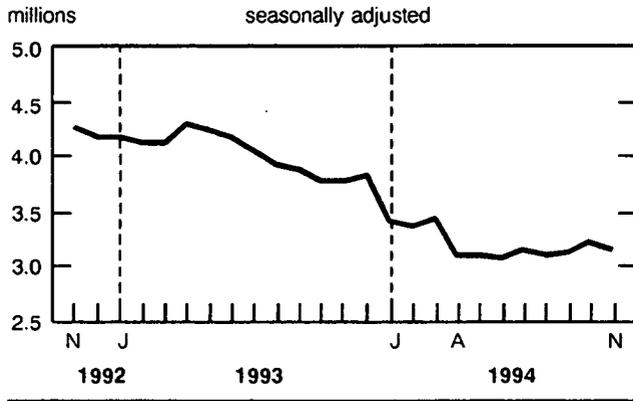
Since January 1992, Canadians' overnight travel to the United States has been decreasing. Considering all modes of transportation, Canadians made 1.3 million overnight trips to the United States in November, down 2.8% from October.

By contrast, since June 1991, Canadians' overnight travel to all other countries has been increasing. This type of travel increased 0.5%, to 282,000 trips, from October to November.

Number of same-day car trips to the United States remains relatively stable

Since April 1994 the number of same-day cross-border car trips by Canadian residents—often used as an indicator of cross-border shopping—has been relatively stable. This type of travel peaked at 5.4 million in November 1991, and then declined until March 1994.

Same-day U.S. car trips by Canadian residents have been stable since April



Canadians made 3.1 million same-day car trips to the United States in November, down 2.1% from October. A major factor behind declines in this type of travel has been the weak Canadian dollar, which stood near US73 cents in November, compared with more than US88 cents in November 1991. Other factors include a narrowing gap between Canadian and U.S. gas prices (C10 cents per litre in November) and reduced taxes on tobacco products in Canada.

Same-day U.S. car trips by Canadian residents

| | November 1994 ^P | November 1993 to November 1994 |
|-----------------------------|----------------------------|--------------------------------|
| | unadjusted | |
| | '000 | % change |
| Canada | 2,895 | -16.1 |
| Province of re-entry | | |
| New Brunswick | 424 | -22.5 |
| Quebec | 267 | -16.9 |
| Ontario | 1,356 | -16.3 |
| Manitoba | 50 | -15.1 |
| Saskatchewan | 23 | -21.4 |
| Alberta | 11 | -17.4 |
| British Columbia | 763 | -11.5 |
| Yukon | 1 | 48.7 |

^P Preliminary figures.

Available on CANSIM: matrices 2661-2697

The November 1994 issue of *International travel, advance information* (66-001P, \$7/\$70) will be available shortly. See "How to order publications".

For further information on this release, contact Ruth Martin (613-951-1791), International Travel Section, Education, Culture and Tourism Division. □

Travel between Canada and other countries

| | September 1994 ^r | October 1994 ^r | November 1994 ^P | October 1994 to November 1994 |
|---------------------------------|--------------------------------|---|---|---|
| seasonally adjusted | | | | |
| | '000 | | | % change |
| Canadian trips abroad | | | | |
| Car trips to the United States | | | | |
| Same-day | 3,101 | 3,199 | 3,131 | -2.1 |
| One or more nights | 814 | 876 | 824 | -6.0 |
| Total trips, one or more nights | | | | |
| United States ¹ | 1,218 | 1,287 | 1,251 | -2.8 |
| Other countries | 283 | 280 | 282 | 0.5 |
| Travel to Canada | | | | |
| Car trips from United States | | | | |
| Same-day | 1,788 | 1,867 | 1,874 | 0.4 |
| One or more nights | 723 | 712 | 724 | 1.7 |
| Total trips, one or more nights | | | | |
| United States ¹ | 1,049 | 1,047 | 1,057 | 1.0 |
| Other countries ² | 301 | 303 | 302 | -0.1 |
| | November 1994 ^P | November 1993 to November 1994 | January to November 1994 ^P | January- November 1993 to January- November 1994 |
| unadjusted | | | | |
| | '000 | % change | '000 | % change |
| Canadian trips abroad | | | | |
| Car trips to the United States | | | | |
| Same-day | 2,895 | -16.1 | 35,254 | -21.3 |
| One or more nights | 565 | -12.6 | 9,578 | -17.3 |
| Total trips, one or more nights | | | | |
| United States ¹ | 935 | -7.9 | 14,149 | -13.6 |
| Other countries | 204 | 4.9 | 3,148 | 3.0 |
| Travel to Canada | | | | |
| Car trips from United States | | | | |
| Same-day | 1,565 | 21.8 | 19,073 | 7.9 |
| One or more nights | 389 | 3.8 | 8,231 | 4.8 |
| Total trips, one or more nights | | | | |
| United States ¹ | 578 | 3.6 | 11,896 | 4.2 |
| Other countries ² | 140 | 18.2 | 3,264 | 11.1 |

¹ Estimates for the United States include counts of cars and buses, and estimated numbers for planes, trains, boats and other methods.

² Figures for "other countries" exclude same-day entries by land only, via the United States.

^P Preliminary figures.

^r Revised figures.

OTHER RELEASES

Department store sales

November 1994

Department store sales (seasonally adjusted) were relatively unchanged in November 1994, up only 0.3% from October. Compared with November 1993, however, sales were 3.8% higher. Sales for the first 11 months of 1994 were 3.0% higher than for the same period of 1993.

Inventories, up 3.6% from October, were 3.4% lower than in November 1993.

Department store sales and inventories

| | Sept. 1994 ^r | Oct. 1994 ^r | Nov. 1994 ^p | Oct. 1994 to Nov. 1994 | Nov. 1993 to Nov. 1994 |
|---------------------|----------------------------|---------------------------|---------------------------|---------------------------------|---------------------------------|
| seasonally adjusted | | | | | |
| | \$ millions | | | % change | |
| Sales | 1,052.7 | 1,111.4 | 1,114.5 | 0.3 | 3.8 |
| Inventories | 4,676.8 | 4,826.8 | 4,999.5 | 3.6 | -3.4 |

^p Preliminary figures

^r Revised figures

Unadjusted

Consumers spent \$726 million in junior department stores in November, a 16.8% increase from November 1993. By contrast, purchases made in major department stores (\$710 million) were 1.9% lower. The junior department stores' sales for the first 11 months of 1994 were 8.7% higher than for the same period of 1993; this compares with a 1.2% decline in the majors' sales. Concession sales (\$56.3 million) accounted for 3.9% of total sales.

All provinces except Prince Edward Island recorded increased sales. Saskatchewan (+15.2%), New Brunswick (+13.6%) and Newfoundland (+12.7%) recorded the largest increases; however,

their combined sales accounted for only 7.7% of total sales. Ontario, with 42.2% of total sales, registered a 5.9% gain.

Department store sales including concessions

| | November 1994 | November 1993 to November 1994 |
|--------------------------|---------------|-----------------------------------|
| unadjusted | | |
| | \$ millions | % change |
| Province | | |
| Newfoundland | 25.1 | 12.7 |
| Prince Edward Island | 5.8 | -2.9 |
| Nova Scotia | 54.4 | 3.4 |
| New Brunswick | 40.9 | 13.6 |
| Quebec | 247.2 | 7.4 |
| Ontario | 606.1 | 5.9 |
| Manitoba | 62.2 | 10.9 |
| Saskatchewan | 44.2 | 15.2 |
| Alberta | 152.9 | 8.9 |
| British Columbia | 196.9 | 3.3 |
| Metropolitan area | | |
| Calgary | 56.7 | 11.8 |
| Edmonton | 59.0 | 2.5 |
| Halifax-Dartmouth | 28.2 | 5.4 |
| Hamilton | 43.4 | 3.8 |
| Montréal | 137.5 | 5.4 |
| Ottawa-Hull | 60.4 | 1.0 |
| Québec | 28.3 | -3.6 |
| Toronto | 224.3 | 4.4 |
| Vancouver | 103.1 | 2.4 |
| Winnipeg | 54.3 | 8.6 |

Available on CANSIM: matrices 111-113.

The November 1994 issue of *Department store sales and stocks* (63-002, \$16/\$160) will be available in February. See "How to order publications". Data on sales and stocks by major commodity line are available in the publication.

For further information on this release, contact Janet Sear (613-951-3551), Retail Trade Section, Industry Division. ■

Oil pipeline transport

October 1994

In October net receipts of crude oil and refined petroleum products into pipelines decreased 1.0% from October 1993, to 16 782 949 cubic metres (m³). Year-to-date receipts to the end of October 1994, at 166 199 044 m³, were up 5.0% from 1993.

Pipeline exports of crude oil decreased 1.2% from October 1993, to 4 734 011 m³. Pipeline imports declined to 892 312 m³, down 2.9% from October 1993. Year-to-date exports at the end of October 1994 (45 983 609 m³) were up 7.0% from 1993, while year-to-date imports (9 466 888 m³) were up 3.7%.

October deliveries of crude oil by pipeline to Canadian refineries totalled 5 221 471 m³, a 3.1% increase from 1993. October deliveries of liquid petroleum gases and refined petroleum products decreased 11.9% to 507 901 m³.

Available on CANSIM: matrix 181.

The October 1994 issue of *Oil pipeline transport* (55-001, \$11/\$110) will be available next week. See "How to order publications".

For further information on this release, contact Gérard O'Connor (613-951-3562), Energy Section, Industry Division. ■

Dairy review

November 1994

Creamery butter production totalled 7.0 thousand tonnes in November, a 7.7% increase from November 1993. Cheddar cheese production amounted to 8.4 thousand tonnes, a 4.4% decrease from November 1993.

An estimated 573.0 thousand kilolitres of milk were sold off farms for all purposes in October 1994, a 5.6% increase from October 1993. This brought the total estimate of milk sold off farms during the first 10 months of 1994 to 5.9 million kilolitres, a 3.6% increase from the year-earlier period.

Available on CANSIM: matrices 3428, 5632-5638, 5650-5661, 5664-5667 and 5673.

The November 1994 issue of *The dairy review* (23-001, \$14/\$138) is scheduled for release January 26. See "How to order publications".

For further information on this release, contact Robert Freeman (613-951-2508), Agriculture Division. ■

PUBLICATION RELEASED

Energy statistics handbook, January 1995.
Catalogue number 57-601
(Canada: \$330; United States: US\$400; other countries: US\$460).

The paper used in this publication meets the minimum requirements of American National Standard for Information Sciences – Permanence of Paper for Printed Library Materials, ANSI Z39.48 – 1984.



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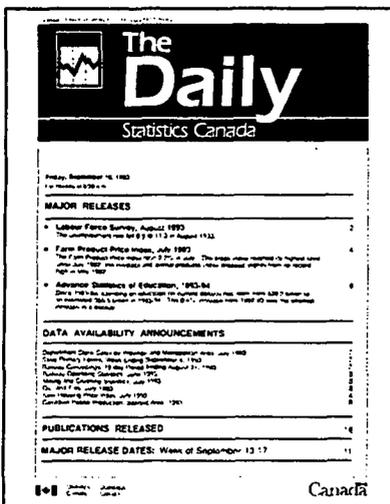
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Published each working day by the Communications Division, Statistics Canada, 10-H, R.H. Coats Bldg., Tunney's Pasture, Ottawa, Ontario K1A 0T6.

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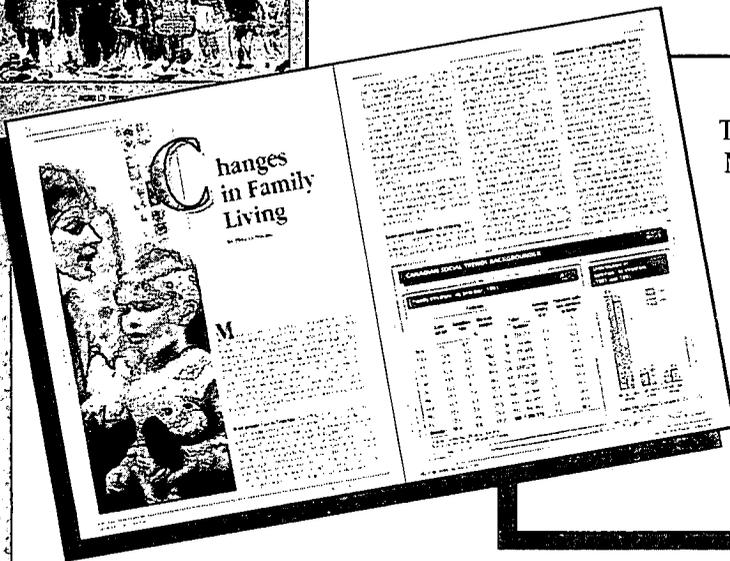
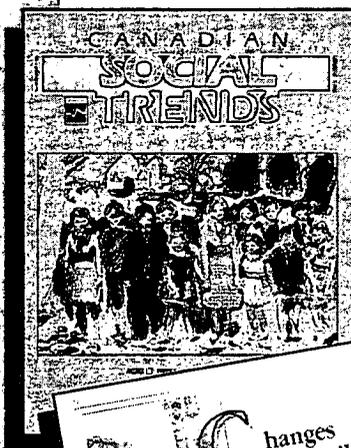
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