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EMPLOYMENT STRUCTURE IN RURAL AND SMALL TOWN CANADA: THE MANUFACTURING SECTOR

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Highlights

- Manufacturing is one of the major employment sectors in Rural and Small Town (RST) Canada. Manufacturing employment ranks as a major sector in rural areas in Nova Scotia, New Brunswick, Quebec and Ontario. We recognise that a different ranking may be derived from a different aggregation of the industrial sectors.
- RST areas are increasing their employment in manufacturing relative to larger urban centres. Thus, RST areas appear to be competitive in manufacturing. However, much of this manufacturing is concentrated in the traditional manufacturing industries that process primary products (e.g. fish, wood, minerals, etc.).

Introduction

The rural industrial picture is changing quickly in Canada. National, provincial and local decisionmakers need an understanding of the mix and the trends of employment among the industrial sectors in rural areas to create policies and strategies that best meet the needs of rural areas.

The purpose of this bulletin is to focus on the role of manufacturing sector in rural Canada during the 1980s and the $1990^{1}s$.





¹ This bulletin is one in a series that includes an "overview" of rural employment in different sectors.

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Note of appreciation

Canada owes the success of its statistical system to a long-standing partnership between Statistics Canada, the citizens of Canada, its businesses, governments and other institutions. Accurate and timely statistical information could not be produced without their continued cooperation and goodwill.

Definitions and data sources

Two data sources using two definitions of "rural" have been used in this bulletin:

Census data for each of 1981, 1986, 1991 and 1996 have been tabulated within constant 1996 census division boundaries for "predominantly rural regions", as defined by the OECD (See Box 1 for the definition). The advantage of this tabulation is that we obtain an extended time-series back to 1981.

Statistics Canada's Labour Force Survey has been tabulated to provide annual data from 1987 to 1998 for rural and small town (RST) areas (see Box 2 for the definition). The advantage of this time-series is that it can be updated on an annual basis.

Box 1

Definition of "Predominantly Rural Regions"

The Organisation for Economic Co-operation and Development (OECD, 1994) has defined a "predominantly rural region" as having more than 50 percent of the population living in rural communities where a "rural community" has a population density less than 150 persons per square kilometre. In Canada, the census division has been used to represent "regions" and census consolidated sub-divisions have been used to represent "communities".

"Intermediate regions" have 15 to 49 percent of their population living in a "rural community". "Predominantly urban regions" have less than 15 percent of their population living in a "rural community".

"Predominantly rural regions" are classified as metro-adjacent, non-metro-adjacent and the north, following Ehrensaft and Beeman (1992).

Data are tabulated for the 1981 to 1996 period within constant 1996 boundaries.

Box 2

Definition of "Rural and Small Town" (RST) Canada

Rural and Small Town (RST) refers to the population living outside the commuting zones of larger urban centres — specifically, outside Census Metropolitan Areas (CMAs) and Census Agglomerations (CAs). RST areas have a population of 1 - 9,999 where less than 50 percent of the employed individuals commute to a CMA/CA and less than 25 percent commute from a CMA/CA.

A CMA has an urban core of 100,000 or over and includes all neighbouring municipalities where 50 percent or more of the labour force commutes into the urban core or more than 25 percent commute from a CMA/CA. A CA is an urban core of 10,000 to 99,999 and abides by the same commuting rule as CMAs.

Data are tabulated within constant boundaries for 1976 to 1984, for 1985 to 1994, and for 1995 to date.

Box 3

Definition of manufacturing sector used in this bulletin

Traditional: food, beverages, tobacco, rubber, plastic, leather, primary textile, textiles, clothing, wood, furniture and fixtures and paper.

Complex: printing, primary metals, fabricated metal, machinery, transportation equipment, electrical and electronic, non-metallic mineral, refined petroleum and coal, chemical and other manufacturing.

Box 4

Location Quotient

A location quotient (LQ) is an index of specialisation or intensity. It compares the employment concentration of a given industry or sector in a given "location" (i.e. rural and small town areas) to that industry or sector's employment concentration in the spatial system as a whole (i.e. province or country)*. By "employment concentration", we mean "percent of the workforce employed in a given sector". As a measure of specialisation or intensity the LQ can be used to ascertain the export capacity of the local economy or the degree of self-sufficiency of a local economy with respect to a particular industry. Therefore, a "location" with the same share of employment as we see at the national level means that the industrial concentration is the same and the LQ value is 100. An LQ below 100 indicates a lower relative employment concentration in the given industry within RST areas. Thus, RST areas are not specialised in this industrial sector and there may be a gap in the RST economy in the sense that RST areas are importing goods or services produced by this sector. An LQ above 100 indicates a higher employment concentration in the RST compared to the overall economy. Thus, RST areas are specialised in this industrial sector which indicates that this is an export activity from RST areas. The difference from 100 is used to specialisation or concentration. The difference from 100 can also be used define the degree of to indicate the degree to which the given sector is exporting from this area or whether RST areas are importing these goods or services.

A change in the LQ of an industry should be carefully interpreted as a change can be due to a number of factors. For example, an increasing share of employment in an RST industrial sector could mean that the area is increasing its employment in the industry but it could also mean that the rest of the country, in the comparison, is actually decreasing its employment in the same industry – or employment is declining in another RST industry. That is, if the employment in manufacturing for a whole country is decreasing but RST manufacturing employment is unchanged, the intensity of RST employment in manufacturing will increase (i.e. the LQ will increase) even though the actual number of individuals employed in manufacturing in RST areas may not have increased. In any case, an increasing LQ for an RST sector means that this sector is increasing its share in RST areas relative to the share this sector holds in the total economy. From this point of view, an increasing LQ suggests that RST areas are relatively competitive in the sense of increasing their market share (i.e. competitive in relation to larger urban centres).

* To calculate the location quotient for primary employment in RST areas, the calculation would =

{ [(number of RST individuals employed in the primary sector) / (number of RST individuals employed in all sectors)] divided by [(total number of individuals employed in the primary sector) / (total number of individuals employed in all sectors)] } times 100.

The manufacturing sector in predominantly rural regions

Historically, manufacturing activity in Canada has been concentrated in larger cities, although parts of rural Ontario and rural Quebec have always had a manufacturing base. During the 1980s and 1990s, predominantly rural regions were relatively more intensive² in "traditional" manufacturing (see Box 3 for the definitions) relative to the overall economy (Figure 1). Each type of predominantly rural region appears 10 to 40 percent more intensive in traditional manufacturing than Canada as a whole. This relative intensity in traditional manufacturing constrained rural employment growth throughout the 1980s – because each type of region experienced a decline in traditional manufacturing employment from 1981 to 1986 and from 1986 to 1991 (Figure 2). Employment levels essentially stabilised in the 1991 to 1996 (post-recession) period – there were small gains in some regions and small losses in other regions.

Figure 1



All rural regions are (somewhat) more intensive in

Predominantly rural regions

Source: Statistics Canada. Census of Population, 1981 to 1996. A predominantly rural region has over 50 percent of its population living in rural communities. An intermediate region has 15 to 49 percent and a predominantly urban region has less than 15 percent.

 $^{^2}$ We use a location quotient, defined in Box 4, to measure "intensity".

Figure 2

In the 1991 to 1996 period, rural metro-adjacent regions reported modest employment growth in TRADITIONAL MANUFACTURING employment



Source: Statistics Canada. Census of Population, 1981 to 1996. A predominantly rural region has over 50 percent of its population living in rural communities. An intermediate region has 15 to 49 percent and a predominantly urban region has less than 15 percent.

Predominantly rural regions are relatively less intensive in complex manufacturing employment, with a location quotient of 60 to 70 percent in the 1981 to 1996 period (Figure 3). Note that rural metro-adjacent regions are approaching the Canada level of complex manufacturing employment intensity. However, these gains are "relative". During the 1980s, the location quotient for predominantly rural complex manufacturing increased because its employment (Figure 4). In the 1991 to 1996 period, each type of predominantly rural region reported gains in employment in complex manufacturing whereas predominantly urban and intermediate regions showed only small changes.

Figure 3



Rural regions are less intensive, but are showing relative

Predominantly rural regions

Source: Statistics Canada. Census of Population, 1981 to 1996. A predominantly rural region has over 50 percent of its population living in rural communities. An intermediate region has 15 to 49 percent and a predominantly urban region has less than 15 percent.

Figure 4

In the 1991 to 1996 period, EACH predominantly rural region reported stronger employment growth in COMPLEX MANUFACTURING employment



Source: Statistics Canada. Census of Population, 1981 to 1996. A predominantly rural region has over 50 percent of its population living in rural communities. An intermediate region has 15 to 49 percent and a predominantly urban region has less than 15 percent.

Note: The large changes in complex manufacturing employment in rural northern regions were an increase of 2,540 jobs (35 percent) in the 1981 to 1986 period and a loss of 3,870 jobs (-40 percent) in the 1986 to 1991 period.

Provincial patterns in rural manufacturing employment

There are many different ways of portraying the structure of employment by industrial sector. With our disaggregation, we find that trade (wholesale and retail) was the single biggest sector in terms of employment in rural and small town (RST) Canada, with an employment level of 426 thousand in 1998 (Table 1). Equally large is RST manufacturing with a 1998 employment level of 425 thousand.

	Canada	New- foundland	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Man- itoba	Sask- atchewan	Albert a	British Columbia
First tier sector(s)	Trade (426K) Manu- facturing (425K)	Trade (15K)	Primary (6K)	Manu- facturing (26K) Trade (26K)	Manu- facturing (23K) Trade (23K)	Manu- facturing (148K)	Manu- facturing (140K)	Primar y (35K)	Primar y (69K)	Primar y (76K)	Trade (39K)
Second tier sector(s)	Primar y (401K)	Primary (12K) Manu- facturing (11K)	Trade (4K)	Primar y (15K) Health (15K)	Health (16K)	Trade (98K)	Trade (122K)	Trade (22K)	Trade (25K)	Trade (53K)	Manu- facturing (31K)
Third tier sector(s)	Health (259K)	Health (11K)	Manu- facturing (2K)	Other services* (12K) Education (11K)	Primar y (13K)	Primary (79K)	Primary (77K) Health (75K)	Health (16K)	Health (17K)	Health (29K)	Ac commod- ation, food & beverages (26K)

Source: Statistics Canada, Labour Force Survey.

Twaral and Small Town¹ refers to the population outside CMAs and CAs. A CMA is an urban core of 100,000 or more plus the neighbouring municipalities where 50 percent or more of the workforce commutes into the urban core. A CA has an urban core of 10,000 to 99,999 and includes the neighbouring municipalities where 50 percent or more commute into the urban core. Thus, the "Rural and Small Town" population lives outside the commuting zone of the larger urban cortes.

""Other services' includes an usement services, sports clubs, personal care on-government organizations, leasing agencies, photographers, tavel agencies, etc.

This is not the pattern in most of the provinces. Although trade ranks at the top at the Canada level, this is only true in four provinces: Newfoundland, Nova Scotia, New Brunswick and British Columbia. At the Canada level, manufacturing also ranks at the top but this is also replicated in RST areas in only four provinces: Nova Scotia, New Brunswick, Quebec and Ontario.

When we compare the RST areas in each province with the overall employment in the respective provinces, we see that the RST areas in six provinces were more manufacturing intensive than their respective provincial economies – the exceptions are the three Prairie Provinces and Ontario (where a location quotient of 96 indicates that RST areas in Ontario are nearly as intensive in manufacturing as are larger urban centres) (Table 2). The intensity of manufacturing in RST areas is due to the intensity of employment in traditional manufacturing industries – which includes fish processing, sawmills, pulp and paper mills, smelters that extract the metallic constituents from raw ore, etc. In each province, except Nova Scotia, RST areas are less intensive in complex manufacturing, relative to the provincial pattern.

compared to the relative intensity of manufacturing employment in the province, 1996 to 1998 average												
	Canada	New- found- land	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Manitoba	Sask- atchewan	Albert a	British Columbia	
Manufacturing	00	407	110	454	104	404	00	74	67	77	100	
wanufacturing	98	137	119	101	134	121	90	74	67		109	
Traditional (1)	127	147	131	163	142	151	113	74	69	82	124	
Complex(2)	61	89	44	107	57	65	74	53	40	4	13	
Total Rural and Small Town	100	100	100	100	100	100	100	100	100	100	100	

Table 2. Location Quotients of the relative intensity of manufacturing employment in Rural and Small Town areas compared to the relative intensity of manufacturing employment in the province, 1996 to 1998 average

Source: Statistics Canada, Labour Force Survey

"Rural and Small Town" refers to the population outside CMAs and CAs. A CMA is an urban core of 100,000 or more plus the neighbouring municipalities where 50 percent or more of the workforce commutes into the urban core. A CA has an urban core of 10,000 to 99,999 and includes the neighbouring municipalities where 50 percent or more commute into the urban core. Thus, the "Rural and Small Town" population lives outside the commuting zone of major urban centes.

 "Traditional" manufacturing industries include food, beverages, tobacco, rubber, plastic, leather, primary textile, textiles, clothing, wood, furniture and fixtures and paper.

(2) "Com plex" manufacturing industries include printing, primary metals, machinery, transportation equipment, electrical and electronic, non-metallic mineral, refined petroleum and coal, chemical and other manufacturing.

As we saw above, rural Canada is increasing its intensity in both traditional manufacturing (Figure 1) and in complex manufacturing (Figure 3), relative to the country as a whole. During the 1980s and the 1990s, there has been a steady increase in the intensity of manufacturing in RST areas, relative to the Canadian economy as a whole, for both traditional and complex manufacturing (Figure 5).

Figure 5



Source: Statistics Canada. Labour Force Survey. Non-self representing units (NSRUs) are smaller municipalities (generally less than 10,000 population). A Census Metropolitan Area (CMA) has a core population of 100,000 or more and includes neighbouring municipalities where 50 percent or more of the workforce commutes to the core. A Census Agglomeration (CA) has a core population of 10,000 to 99,999 and includes neighbouring municipalities where 50 percent or more of the workforce commutes to the core. An asterisk (*) indicates some of the changes may be due to a change in the survey design.

Diversity within provinces

Relative to the total level of employment in a given census division, there are 35 census divisions (out of 288) with 15 percent or more of their workforce in traditional manufacturing employment (Map 1). Two-thirds of these census divisions (23 census divisions) are located in Quebec and they largely are associated with processing wood (sawmills, pulp and paper, furniture manufacturing enterprises, etc.). Only one is in Ontario – Sudbury, which is known for smelting nickel and other ores. Three are in British Columbia associated with wood processing. The remaining 8 census divisions are in the Atlantic Provinces in census divisions associated with both wood processing and fish processing.

There are 16 census divisions where complex manufacturing represents 15 percent or more of the workforce (Map 2). Among these, 13 are in southern Ontario (one includes Oshawa with its car assembly plant and the remaining 12 are between Hamilton and Windsor) and 3 are in Quebec (the Bois-Francs area and le Bas-Richelieu census division, which includes the city of Sorel). Note that these census divisions are not large metropolitan centres. The majority of these census divisions in Ontario have close access to the USA automobile manufacturing plants – this is important both for shipping autoparts to USA assembly plants and for shipping autoparts from USA firms to Canadian assembly plants.





Summary

Manufacturing is one of the major employment sectors in Rural and Small Town (RST) Canada. Manufacturing employment ranks as a major sector in rural areas in Nova Scotia, New Brunswick, Quebec and Ontario. We recognise that a different ranking may be derived from a different aggregation of the industrial sectors.

RST areas are increasing their employment in manufacturing relative to larger urban centres. Thus, RST areas appear to be competitive in manufacturing. However, much of this manufacturing is concentrated in the traditional manufacturing sectors that process primary products (e.g. fish, wood, pulp and paper, minerals, etc.).

Manufacturing employment fluctuates with the business cycle. As RST areas become more intensive in manufacturing employment, RST areas will become more sensitive to the business cycle expansions and recessions.

References

Ehrensaft, Philip and Jennifer Beeman. (1992) "Distance and Diversity in Nonmetropolitan Economies", Chapter 9 in Ray D. Bollman's **Rural and Small Town Canada** (Toronto: Thompson Educational Publishing).

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Table A	: Manufacturing employment by	y type of region,	, Canada and Provinces, 1991 a	ad 1996

		Total manufact	uring	Tra	aditional manuf	acturing	Co	mplex manufa	cturing
Type of region	Employed	Employed	Percent change	Employed	Employed	Percent change	Employed	Employed	Percent change
	in	in	in employment	in	in	in employment	in	in	in employment
	1991	1996	1991 - 1996	1991	1996	1991 - 1996	1991	1996	1991 - 1996
CANADA	1,848,950	1,882,255	1.8	765,165	770,010	0.6	1,083,790	1,112,245	2.6
Predominantly urban regions	948,590	942,370	-0.7	346,270	348,225	0.6	602,320	594,140	-1.4
Intermediate regions	417,050	425,270	2.0	138,250	136,230	-1.5	278,805	289,045	3.7
All predominantly rural regions	483,310	514,615	6.5	280,645	285,555	1.7	202,665	229,065	13.0
Rural metro-adjacent regions	267,220	288,590	8.0	128,540	133,885	4.2	138,680	154,705	11.6
Rural non-metro-adjacent regions	191,555	200,490	4.7	133,520	132,930	-0.4	58,030	67,565	16.4
Rural northern regions	24,540	25,535	4.1	18,585	18,735	0.8	5,950	6,795	14.2
NEWFOUNDLAND	20,540	13,335	-35.1	16,215	8,560	-47.2	4,325	4,770	10.3
Intermediate regions	7,940	5,300	-33.2	5,465	2,760	-49.5	2,475	2,535	2.4
All predominantly rural regions	12,600	8,035	-36.2	10,750	5,800	-46.0	1,850	2,240	21.1
Rural non-metro-adjacent regions	11,250	7,460	-33.7	9,535	5,325	-44.2	1,720	2,140	24.4
Rural northern regions	1,350	570	-57.8	1,215			135	*	*
PRINCE EDWARD ISLAND (1)	6,175	6,330	2.5	4,775	4,395	-8.0	1,400	1,935	38.2
Rural metro-adjacent regions	1,930	2,215	14.8	1,050	1,070	1.9	875	1,145	30.9
Rural non-metro-adjacent regions	4,245	4,115	-3.1	3,720	3,325	-10.6	525	790	50.5
NOVA SCOTIA	44,345	39,810	-10.2	28,385	24,310	-14.4	15,965	15,495	-2.9
Intermediate regions	11,235	10,160	-9.6	3,765	3,735	-0.8	7,475	6,425	-14.0
All predominantly rural regions	33,110	29,645	-10.5	24,620	20,570	-16.5	8,490	9,075	6.9
Rural metro-adjacent regions	13,330	11,780	-11.6	8,890	7,750	-12.8	4,445	4,035	-9.2
Rural non-metro-adjacent regions	19,780	17,865	-9.7	15,730	12,825	-18.5	4,050	5,035	24.3
NEW BRUNSWICK	40,150	37,755	-6.0	26,705	25,290	-5.3	13,450	12,460	-7.4
Predominantly urban regions	5,855	3,510	-40.1	2,045	1,505	-26.4	3,810	2,000	-47.5
Intermediate regions	2,365	2,560	8.2	1,455	1,270	-12.7	915	1,285	40.4
All predominantly rural regions	31,925	31,685	-0.8	23,205	22,510	-3.0	8,725	9,175	5.2
Rural metro-adjacent regions	15,160	15,450	1.9	9,550	9,635	0.9	5,610	5,815	3.7
Rural non-metro-adjacent regions	16,770	16.235	-3.2	13.655	12.875	-5.7	3,110	3,360	8.0
OUEBEC	534,970	531.080	-0.7	271.555	264,405	-2.6	263.415	266,670	1.2
Predominantly urban regions	287,405	268,390	-6.6	127,960	115,925	-9.4	159,445	152,465	-4.4
Intermediate regions	126.605	129,770	2.5	62,980	63.425	0.7	63,620	66.345	4.3
All predominantly rural regions	120,965	132,915	9.9	80.615	85.055	5.5	40.350	47.865	18.6
Rural metro-adjacent regions	61.260	67.135	9.6	37.285	38,875	4.3	23.970	28.260	17.9
Rural non-metro-adjacent regions	56.325	62.255	10.5	40.280	42.970	6.7	16.045	19.285	20.2
Rural northern regions	3 385	3 530	43	3.055	3 210	51	330	320	-3.0
ONTARIO	852 425	867 230	1.7	250.845	261 320	4.2	601 585	605 910	0.7
Predominantly urban regions	447 705	444 910	-0.6	133 700	140 115	4.2	314 000	304 800	-2.9
Intermediate regions	254 020	260 550	2.6	59 905	60 335	0.7	194 115	200 215	3.1
All predominantly rural regions	150 705	161 775	7.3	57,235	60,875	6.4	93 470	100 895	7.9
Rural metro-adjacent regions	118 400	125 865	63	39 510	41 100	4.0	78 885	84 765	7.5
Rural non-metro-adjacent regions	24 395	27 685	13.5	11 250	12 865	14.4	13 145	14 825	12.8
Rural northern regions	7 915	8 215	3.8	6.475	6 910	67	1 435	1 305	-9.1
MANITORA	55 390	58 580	5.8	23 830	25.675	7.7	31 560	32.905	4.3
Predominantly urban regions	39,550	39,380	0.7	16,600	17 380	1.7	22.950	21 895	4.5
All predominantly urban regions	15 845	19,280	21.8	7 235	8 295	4.7	8 610	11.005	-4.0
Pural matro adjacent regions	10,195	12,300	21.6	4.450	5 480	23.1	5 745	6.920	27.8
Rural non-matra adjacent regions	4 220	5.010	15.7	4,450	2,455	19.2	2,745	0,920	12.2
Rural non-metro-aujacent regions	4,550	1,800	13.7	2,075	2,455	18.5	610	1,520	150.9
SASKATCHEWAN	24.975	20.675	43.7	0.665	10.205	-40.9	15 210	1,530	27.4
Intermediate regions	14,800	16 025	12.7	9,005	4,700	0.0	10,205	12,370	10.0
All prodominantly gural ragions	0.000	12,740	27.5	4,080	4,700	12.6	5.005	7 125	19.9
An predominantly futar regions	5,990	12,740	27.5	4,980	3,005	12.0	3,005	7,135	42.0
Rural metro-adjacent regions	5,145	5,640	29.1	2,755	2,945	0.9	2,395	3,095	34.5
Rural non-metro-adjacent regions	4,080	5,010	19.9	2,130	2,310	17.0	2,343	3,095	21.0
Rural northern regions	165	490	197.0	25.250	145	22.2	(2.215	340	15.0
	97,660	114,880	17.0	35,350	43,245	22.3	62,315	/1,635	15.0
All and antiparties much and antipart	75,160	87,025	19.0	25,440	28,885	23.2	49,715	58,140	7.1
All predominantly rural regions	24,505	27,855	13.7	11,910	14,360	20.6	12,595	13,495	7.1
Rural metro-adjacent regions	17,680	19,605	10.9	1,525	8,640	14.8	10,155	10,965	8.0
Kurai non-metro-adjacent regions	0,425	1,115	21.0	4,350	5,585	28.4	2,080	2,185	5.0
Rural northern regions	405	4/0	16.0	-	130	*	74.105	540	0.0
DRITISH COLUMBIA	1/1,7/5	182,875	0.5	97,665	102,190	4.6	74,105	80,685	8.9
All and density or the second second	94,915	99,250	4.6	42,520	44,415	4.5	52,400	54,835	4.6
An preuominanuy rural regions	/0,855	83,623	ð.ð	55,145	5/,//5	4.8	21,/10	20,845	19.0
Kural metro-adjacent regions	24,120	27,495	14.0	17,525	18,390	4.9	0,595	9,105	38.1
Kurai non-metro-adjacent regions	43,355	46,470	1.2	50,805	32,185	4.5	12,555	14,285	13.8
Kurai northern regions	9,375	9,655	3.0	6,815	7,195	5.6	2,560	2,460	-3.9
Y UKON (2)	310	280	-9.7	100	125	*	207	155	0.0
NW1 (2)	525	430	52.5	100	180	80.0	225	245	8.9

Source: Statistics Canada. Census of Population, 1991-1996.

(1) Since all of Prince Edward Island is classified as "predominantly rural regions", the total for the province provides the data for "all predominantly rural regions".

(2) Since all of the Yukon and the Northwest Territories are classified as "rural northern regions", the total for each territory provides the data for "rural northern regions".

* Estimated population is less than 100.

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