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THE VICE PRESIDENT WASHINGTON

April 29, 1976

MEMORANDUM FOR BILL BAROODY

Attached is this week's copy of the Weekly Briefing Notes.

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WEEKLY BRIEFING NOTES

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FOR CALENDER YEAR 1976

April 26,1976

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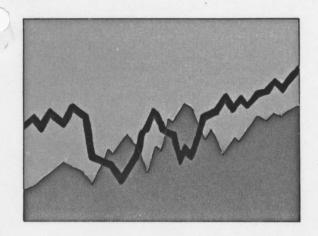
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WEEKLY BRIEFING NOTES ON U.S. DOMESTIC DEVELOPMENTS

Prepared for the President and the Vice President

APRIL 26, 1976

COMPILED BY THE FEDERAL STATISTICAL SYSTEM

Coordinated by the Bureau of the Census at the request of the Statistical Policy Division, Office of Management and Budget

Vincent P. Barabba, Director Bureau of the Census Joseph W. Duncan,
Deputy Associate Director
for Statistical Policy
Office of Management and Budget



SOURCES OF DATA



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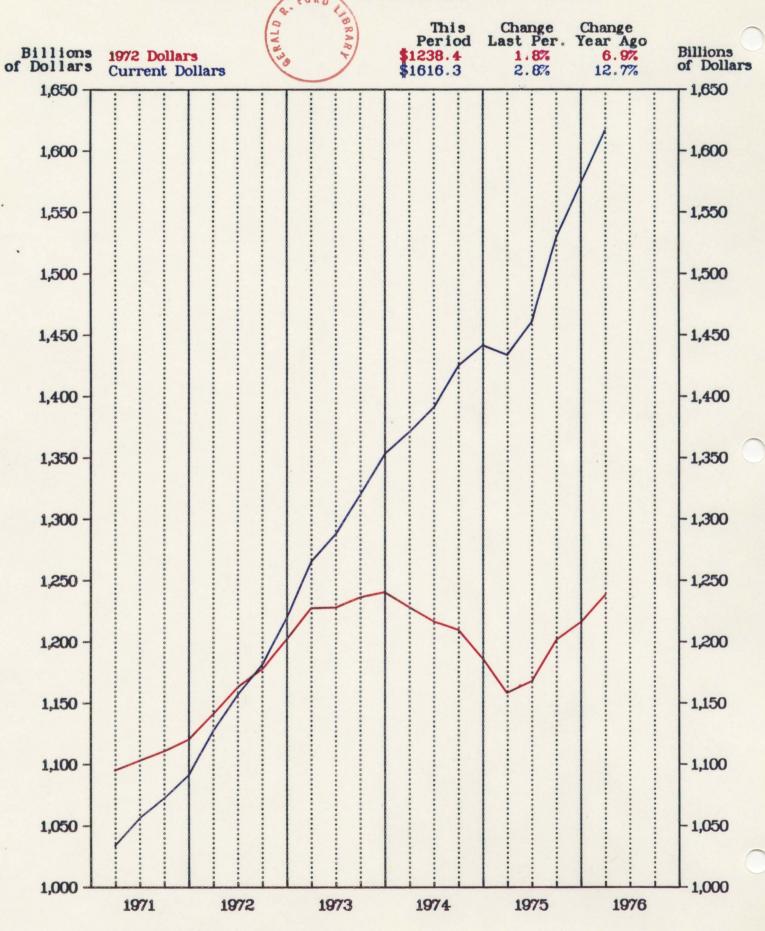
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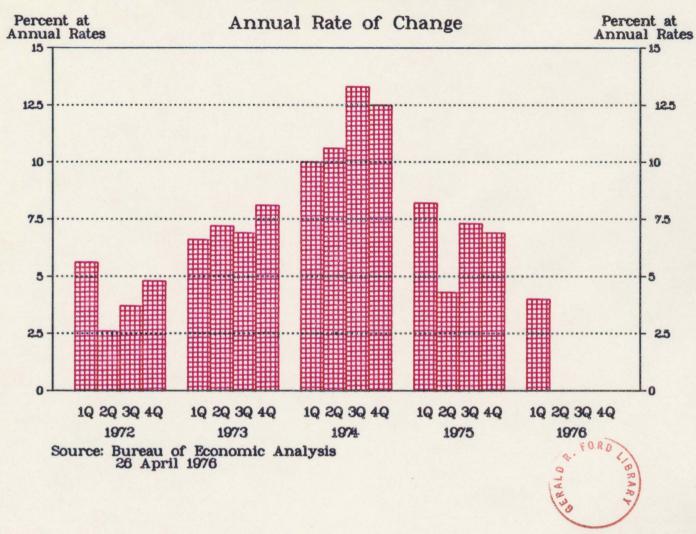
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	- Hobbies, Sports, Music, etc.				X		
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A.1.1-Gross National Product



Source: Bureau of Economic Analysis 26 April 1976

A.1.1-Chain Price Index

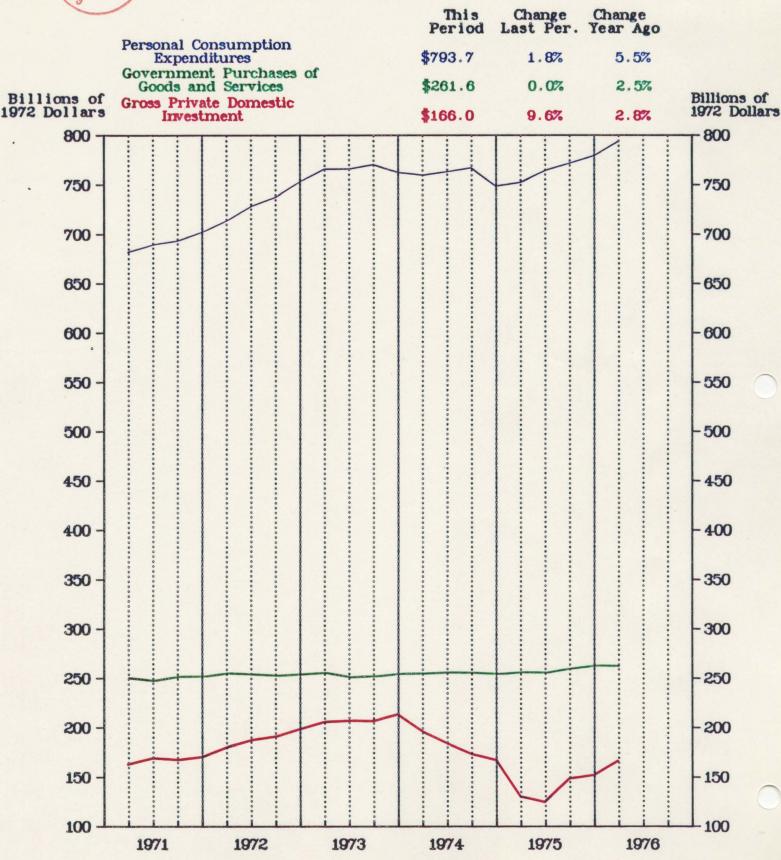


- According to preliminary estimates, Real Gross National Product (as measured in 1972 dollars) rose for the fourth consecutive quarter to \$1,238 billion at a seasonally adjusted annual rate of 7.5 percent.
 - The highest level since the prerecession peak of \$1,241 billion recorded in the fourth quarter of 1973.
 - A significant increase over the 5.0-percent growth rate of the final quarter of 1975.
- Gross National Product in current dollars increased \$43.4 billion to an annual rate of \$1,616 billion, an 11.5-percent increase over the pace of the previous quarter.
- As measured by the GNP Chain Price Index, the annual rate of inflation dropped from 6.9 percent to 4.0 percent, a 42.0-percent decrease.

NOTE: Chain Price Index is a weighted average of all price indexes for goods and services measured in GNP.

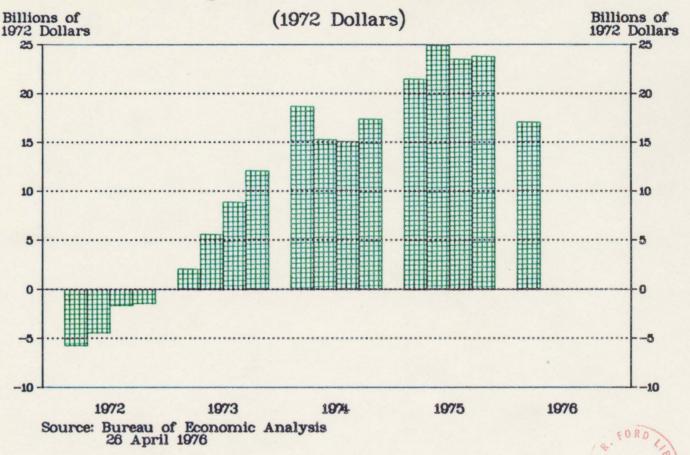


A.1.1—Selected Components of Gross National Product (1972 Dollars)



Source: Bureau of Economic Analysis 26 April 1976

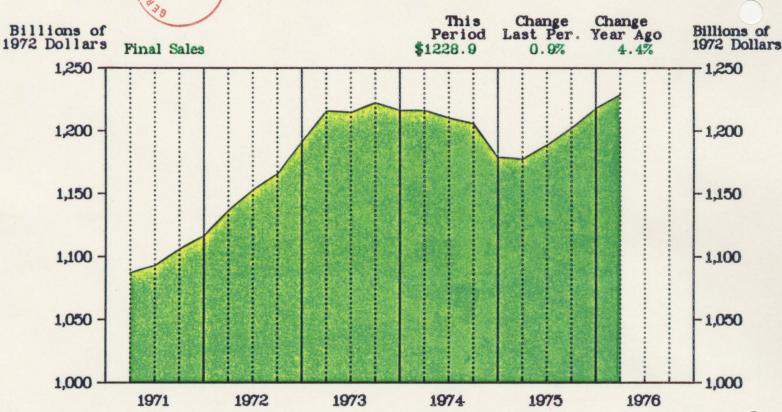
A.1.1-Net Exports of Goods and Services



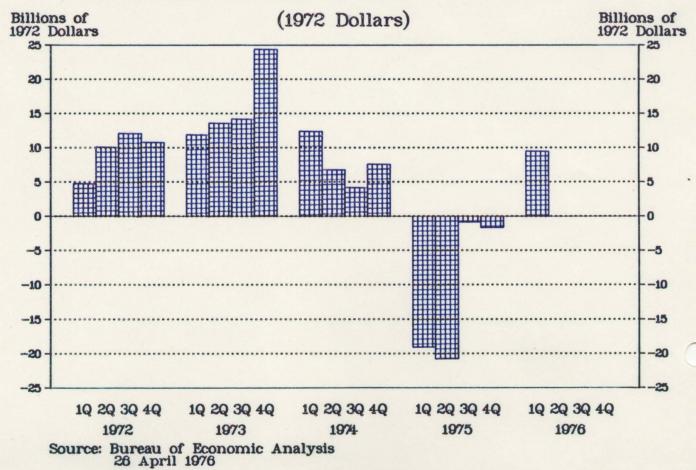
- Gross Private Domestic Investment rose 9.6 percent, or \$14.6 billion from the previous quarter.
 - Most of the rise occurred in business inventories with business fixed investment recording only a small increase.
- Personal Consumption Expenditures rose \$14.3 billion to a record high rate of \$793.7 billion.
- Government Purchases of Goods and Services remained at last quarter's level of \$261.6 billion.
- Net Exports of Goods and Services dropped \$6.7 billion to \$17.1 billion, the lowest level since the fourth quarter of 1974.
 - Exports decreased \$2.5 billion while imports increased \$4.2 billion.



A.1.1-Final Sales



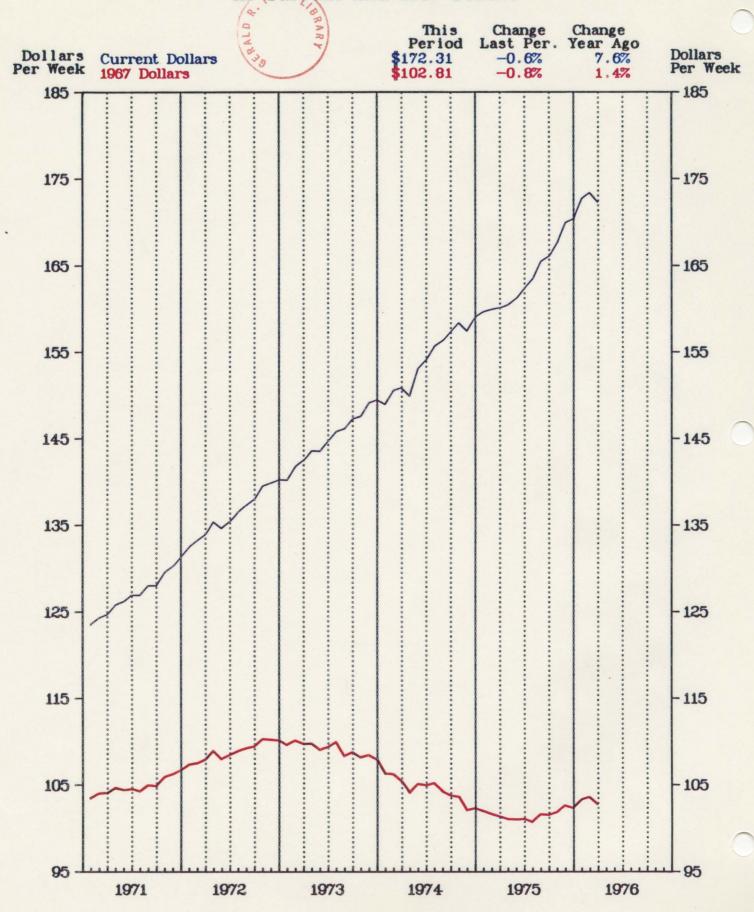
Change in Business Inventories





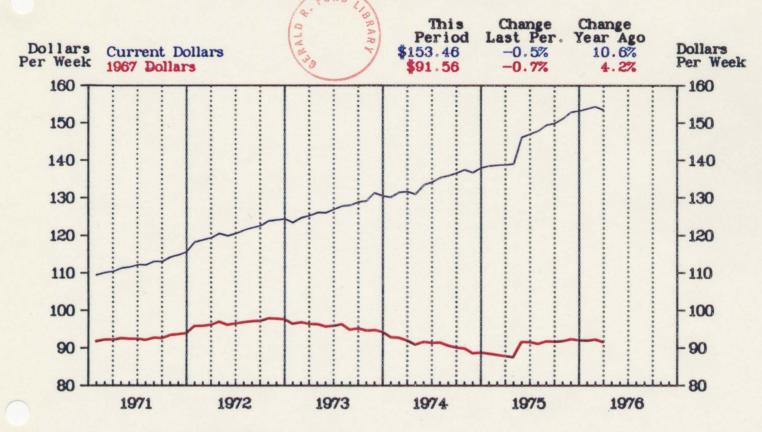
- Real Final Sales (portion of GNP sold to ultimate users; consumption expenditures of private and governmental sectors, fixed investment, and net exports) continued its pattern of growth for the fourth consecutive quarter.
 - A slowdown from the 5.2 percent annual growth rate of the previous quarter to a rate of 3.7 percent primarily due to a decline in U.S. net exports.
- •Business inventories rose strongly, with stocks increasing at an annual rate of \$9.5 billion (1972 dollars), in comparison to a \$1.6 billion reduction in the previous quarter.
 - Investment in inventories was up \$28.5 billion from the \$19.0 billion deficit of a year ago.

A.3.4-Gross Average Weekly Earnings In Current and 1967 Dollars



Source: Bureau of Labor Statistics 26 April 1976

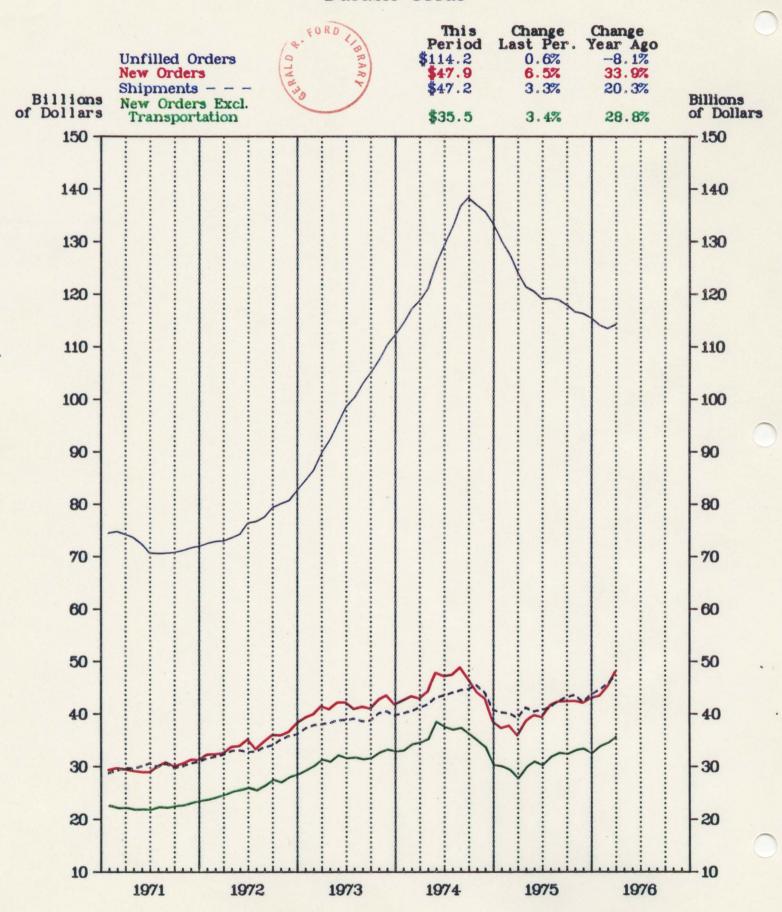
A.3.4-Spendable Average Weekly Earnings In Current and 1967 Dollars



Source: Bureau of Labor Statistics 26 April 1976

- Real Gross Weekly Earnings (1967 dollars) declined 0.8 percent in March.
 - A 0.2-percent increase in average hourly earnings was offset by an 0.8-percent drop in average weekly hours and a 0.2-percent increase in the Consumer Price Index.
- Real Spendable Earnings (1967 dollars) fell 0.7 percent below the February level.
 - Over the year, Real Spendable Earnings rose 4.2 percent.
 - Increase due to a gain in real average weekly earnings and reduction in Federal income tax effective May 1, 1975.

A.4.4-Manufacturers' Shipments and Orders Durable Goods



Source: Bureau of the Census 26 April 1976

A.4.4-Manufacturers' Shipments and New Orders

Capital Goods Nondefense Industries



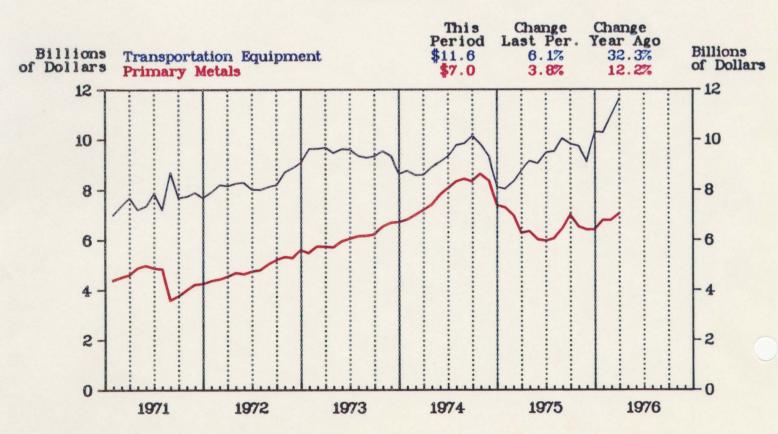
Source: Bureau of the Census 26 April 1976

- New Orders for Durable Goods rose in March for the fourth consecutive month to \$47.9 billion, the highest level since the August 1974 peak of \$48.7 billion.
 - Following an upward-revised 4.0-percent gain in February, New Orders increased \$2.9 billion, or 6.5 percent; the largest rise since last April.
 - New Orders Excluding Transportation rose 3.4 percent (\$1.2 billion) to \$35.5 billion.
- Shipments advanced 3.3 percent (\$1.5 billion) to a new high of \$47.2 billion, with nearly all industries reporting increases.
- New Orders exceeded Shipments for the second time in 17 months resulting in a \$715 million increase in Unfilled Orders.
- Shipments of Nondefense Capital Goods rose more slowly in March, up \$96 million compared to a \$266 million increase in February.
- •New Orders for Nondefense Capital Goods continued to increase briskly, up \$326 million.
- The Defense Capital Goods sector rose \$1.2 billion (60 percent) to \$2.9 billion.

A.4.4-Manufacturers New Orders Durable Goods



Manufacturers Shipments
Durable Goods



Source: Bureau of the Census 26 April 1976



New Orders:

- Transportation Equipment accounted for more than half of the March rise in New Orders.
 - Up \$1.8 billion, or 16.5 percent to a new high of \$12.4 billion.
 - Nearly two-thirds of the reported rise was in the Aircraft and Parts industries.
- Machinery increased 2.0 percent (\$274 million) to the highest level since August 1974.
- Primary Metals rose \$656 million or 9.8 percent, the largest increase since last May's 25.2-percent surge.

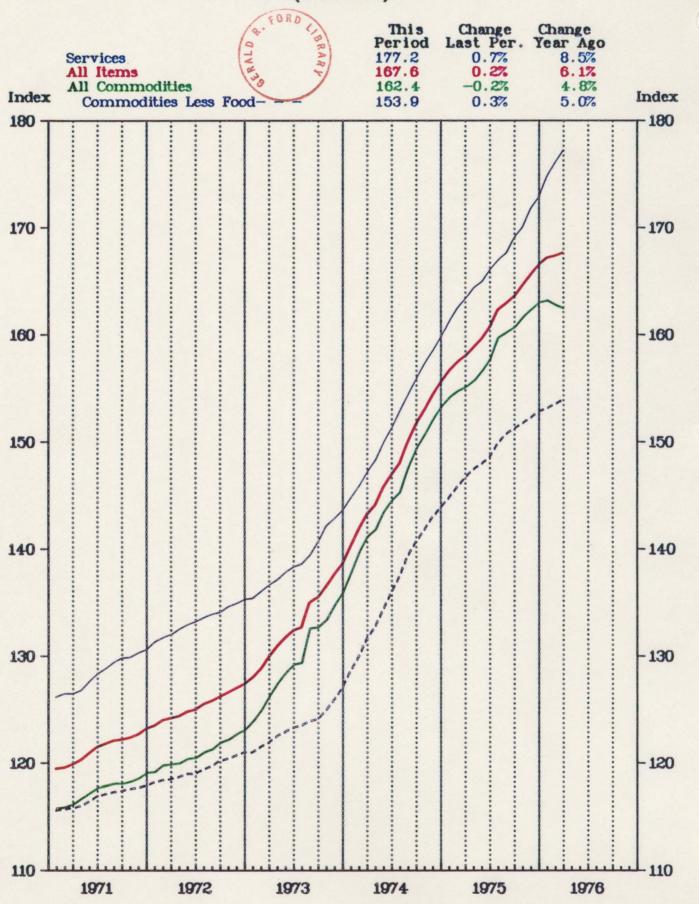
Shipments:

• Transportation Equipment increased 6.1 percent or \$669 million, nearly half of the March rise in Shipments.

Since November, Shipments of Transportation Equipment have increased 27.6 percent.

 Primary Metals rose 3.8 percent highest level since January 1975.

A.6.1-Consumer Price Index (1967=100)

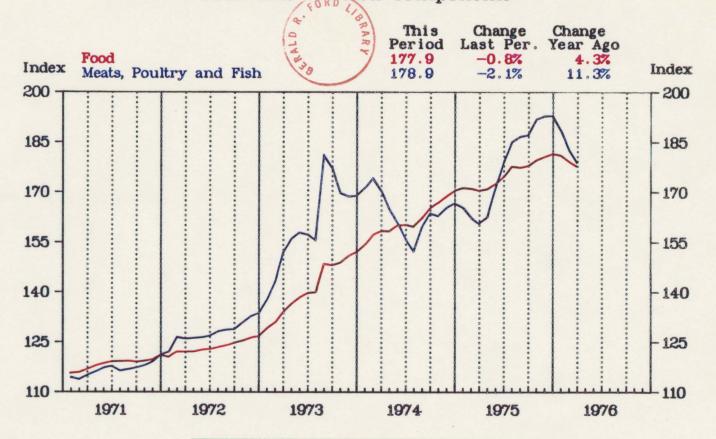


Source: Bureau of Labor Statistics 26 April 1976

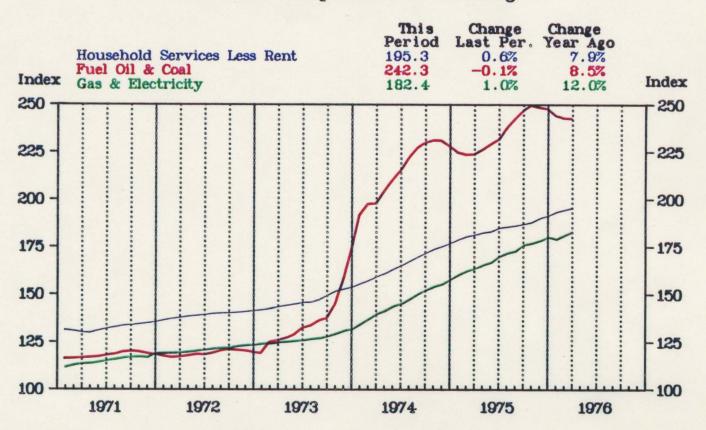


- The Consumer Price Index for All Items rose 0.2 percent in March after edging up 0.1 percent in February.
 - It was the second smallest increase since July 1973 as declines in the Food and Fuel indexes partially offset increases in other commodities and services.
 - Consumer Prices rose at an annual rate of 2.9 percent in the first 3 months of 1976, the slowest quarterly gain since the second quarter of 1972.
- Reflecting drops in Food and Fuel, the All Commodities index posted its second consecutive decline (0.2 percent).
 - A string of moderate advances in Commodities Less Food remained unbroken.
 - Up 0.3 percent following similar rises in each of the previous 6 months.
- Spurred by increases in all major components, the Services index posted a 0.7-percent rise in March, the same as in February but below January's 1.1-percent hike.
 - For the first quarter of 1976, Services rose at an annual rate of 10.2 percent, the fastest quarterly pace since the third quarter of 1974.

A.6.1-Consumer Price Index Food and Selected Components



Selected Components of Housing



Source: Bureau of Labor Statistics 26 April 1976

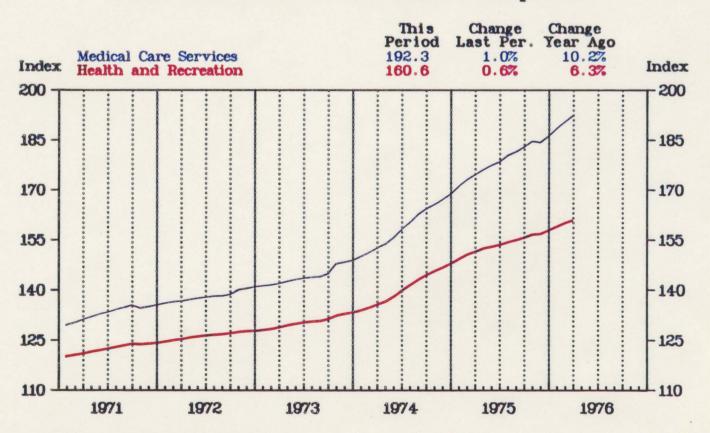


- The Food Index fell a further 0.8 percent in March for a total decrease of 2.0 percent since December.
 - All major components, with the exception of restaurant meals, declined.
 - The largest decline occurred in the Meats, Poultry, and Fish index, which fell 2.1 percent to the lowest level since last June.
- In the Housing sector, Household Services Less Rent rose 0.6 percent, reflecting a 1.0-percent increase in Gas and Electricity charges.
 - Fuel Oil and Coal declined for the fifth consecutive month, but more slowly than in previous months.
 - Down 0.1 percent compared to declines of 1.4 percent and 0.6 percent in January and February, respectively.

A.6.1-Consumer Price Index Selected Components of Transportation



Health and Recreation and Selected Components

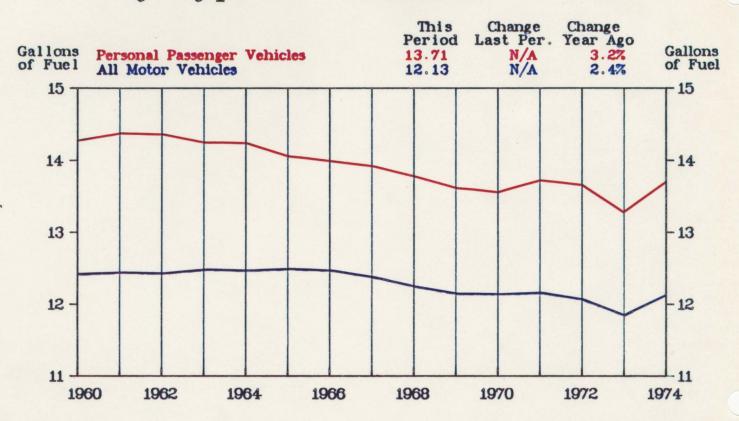


Source: Bureau of Labor Statistics 26 April 1976

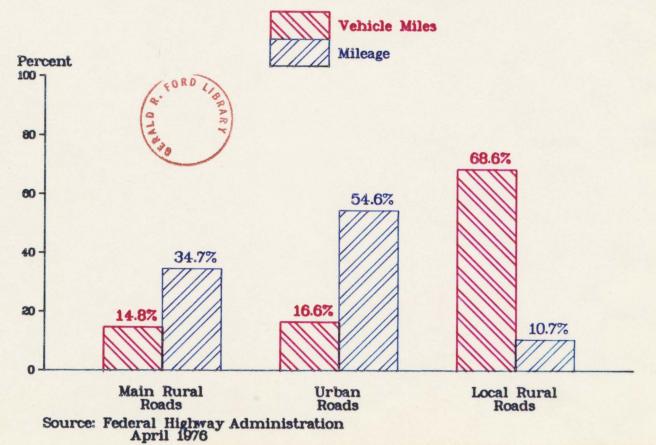


- Among components of Transportation, Services rose 1.3 percent reflecting increases in auto insurance rates and public transportation charges.
 - Since August, Transportation Services have risen rapidly, up 12.6 percent.
- Used Car prices rose sharply for the second month in a row.
 - Up 3.8 percent following a 2.7-percent rise in February.
- Gasoline and Motor Oil prices fell for the fourth straight month, down a total of 4.9 percent since November to 170.6, the lowest level since mid-1975.
- Health and Recreation costs rose 0.6 percent, the same as in February.
- Costs for Medical Care Services increased 1.0 percent following rises of 1.2 and 1.1 percent in January and February, respectively.

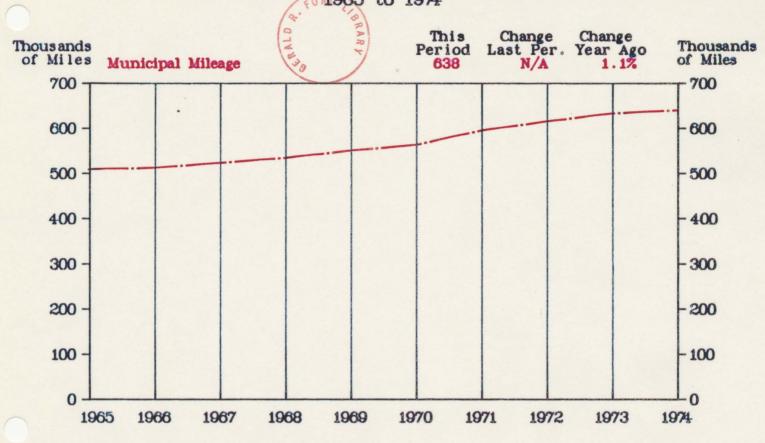
A.12.1—Average Number of Miles Traveled Per Gallon of Fuel Consumed by Type of Vehicle:1960 to 1974



A.12.1—Road Mileage and Vehicle—Miles by Type of Road System:1974



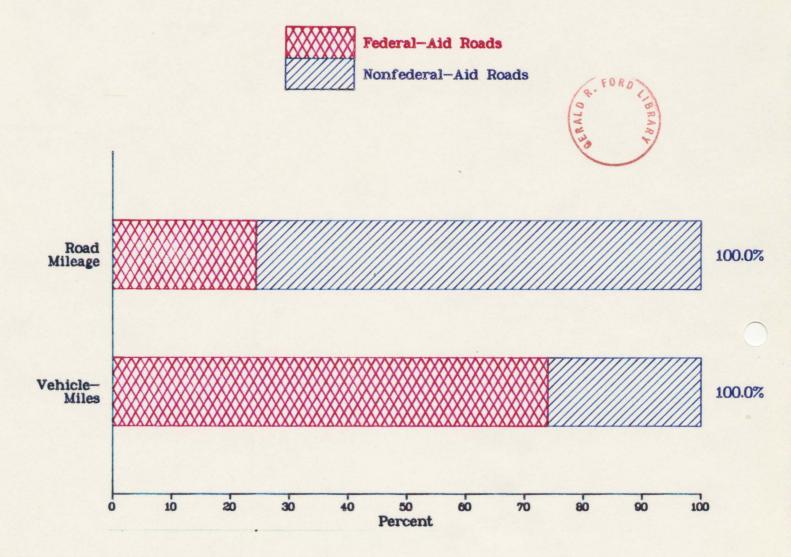
A.12.1-Total Municipal Road Mileage



Source: Federal Highway Administration April 1976

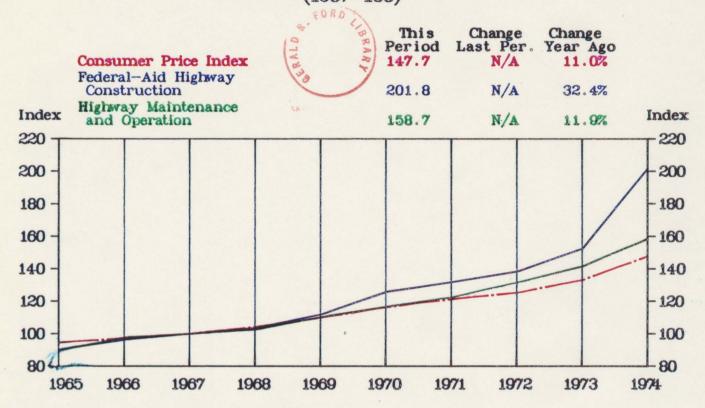
- Reversing the trend of recent years, a significant increase occurred in fuel efficiency for all motor vehicles in 1974.
 - Most of the increase was accounted for by the rise from 13,29 to 13.71 miles per gallon by personal passenger vehicles.
- In 1974, only 10.7 percent of all vehicular traffic occurred on local rural roads, which comprised 68.6 percent of total U.S. road and street mileage.
 - Main rural roads and urban roads combined accounted for only 31.4 percent of road mileage, but 89.3 percent of all vehicle miles traveled.
- Expansion of street mileage in municipal areas has accounted for all of the increase in road mileage in the United States since 1965.
 - Urban roads have grown from 507,000 miles in 1965 to 638,000 miles in 1974, an increase of 25.8 percent.

A.12.1-Percent of Road Mileage and Vehicle-Miles by Federal-Aid and Nonfederal-Aid Systems



Source: Federal Highway Administration April 1976

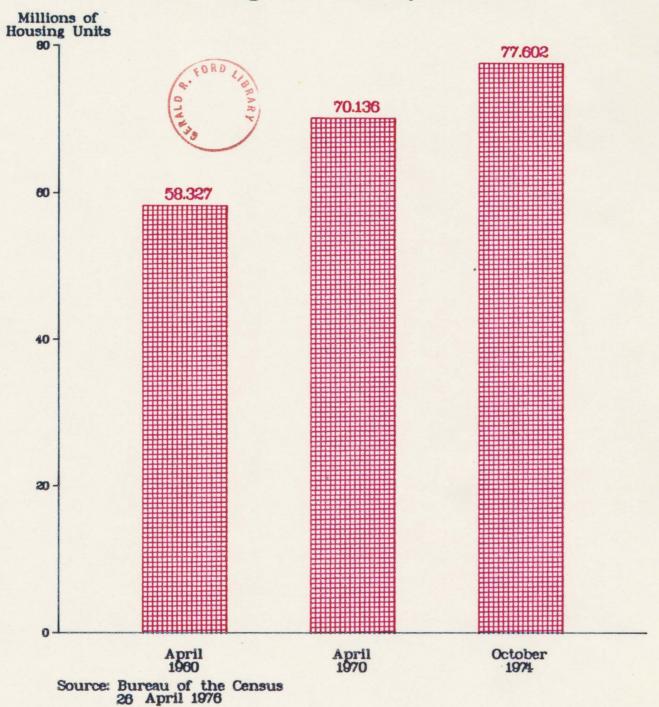
A.12.1-Highway Expenditures Indexes and the Consumer Price Index (1967=100)



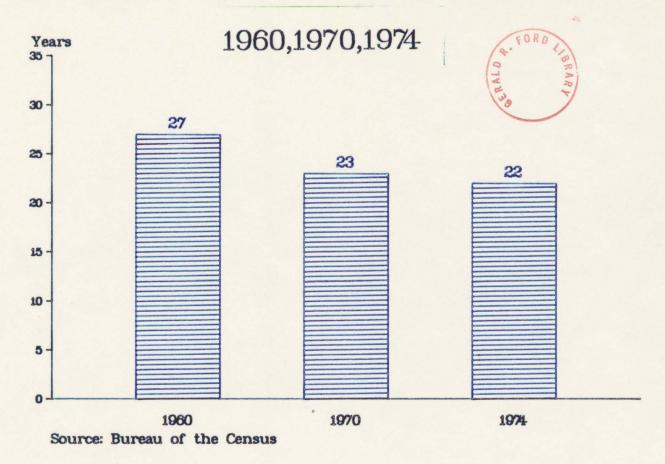
Source: Federal Highway Administration April 1976

- Although State and local road systems receiving Federal assistance comprise only one-fourth of all road mileage they carry nearly three-fourths of all travel.
- Since 1969, costs of maintaining, operating, and constructing highways have inflated at a more rapid pace than the Consumer Price Index.
 - The Index of Federal-aid highway construction costs increased by nearly one-third in 1974 alone.
 - A total increase of 80.5 percent since 1969.
 - The Index for Costs of Highway Maintenance and Operation of all roads, while rising 11.9 percent in 1974, has increased 43.8 percent since 1969.

B.7.2-Housing Inventory: 1960,1970,1974

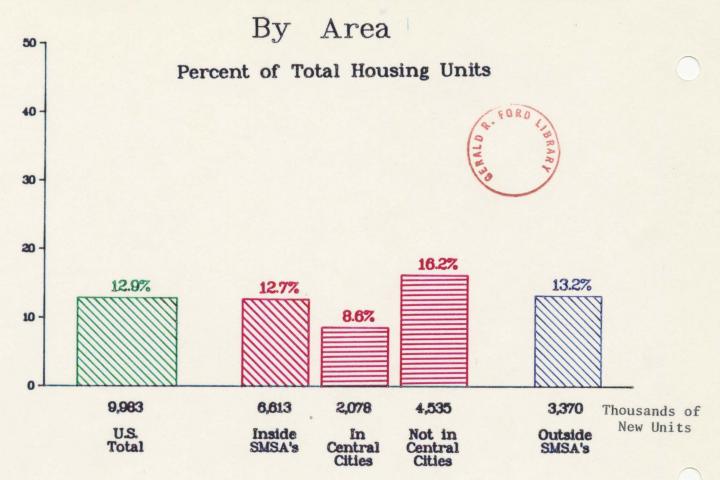


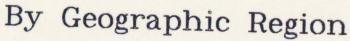
B.7.2-Median Age of Housing in Years:

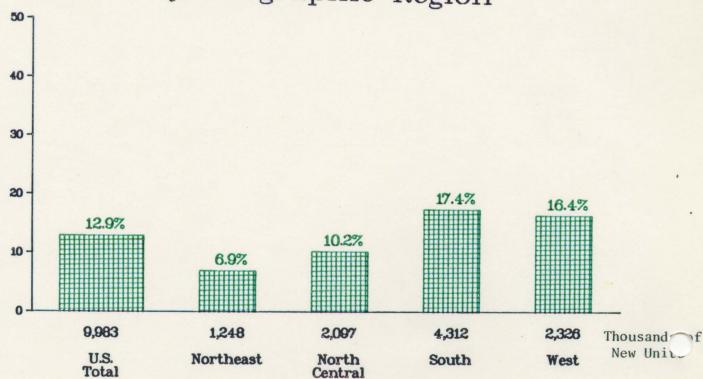


- The Housing Inventory in the United States increased 33 percent from 1960 to 1974, a gain of 19,275,000 units.
 - More than a third of the increase occurred between 1970 and 1974 when the Inventory grew from 70,136,000 units to a total of 77,602,000 units--a 10.6-percent gain.
- While the Housing Inventory grew, the Median Age of Housing declined from 27 years in 1960 to 22 years in 1974.

B.7.2-New Construction:1970 to 1974







Source: Bureau of the Census 26 April 1976

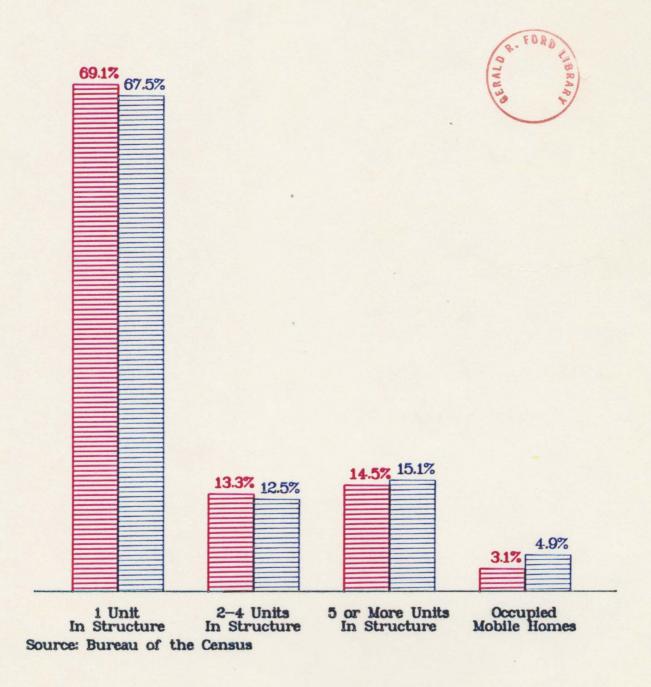


- Nearly 13 percent of all units in the 1974 Housing Inventory were built since 1970.
 - Most of the New Construction--4.5 million units--occurred in the suburbs of large metropolitan areas (16.2 percent of total housing units in those areas).
 - 2.1 million units were built in the Central Cities, bringing total metropolitan housing construction (inside SMSA's) to 6.6 million units.
 - Construction in nonmetropolitan areas between 1970 and 1974 amounted to 3.4 million units (13.2 percent of the total non-metropolitan Housing Inventory).
- The largest volume of home building occurred in the South, where 4.3 million units have been built since 1970.

B.7.2-Percent Distribution of All Year-Roun Housing Units: 1970 and 1974

By Number of Units in Structure

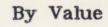


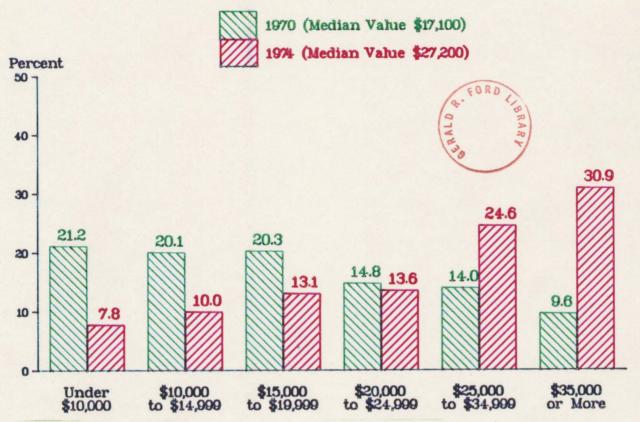




- While the total number of Single-Unit Structures increased during the first 4 years of the decade, their percentage of the total (year-round) Housing Inventory decreased from 69.1 percent in 1970 to 67.5 percent in 1974.
 - The proportion of 2 to 4-unit structures also declined, while structures with 5 or more units assumed a greater part of the total.
- The total number of occupied mobile homes increased by nearly 80 percent between 1970 and 1974, resulting in a substantial increase in their proportionate place in the Inventory.

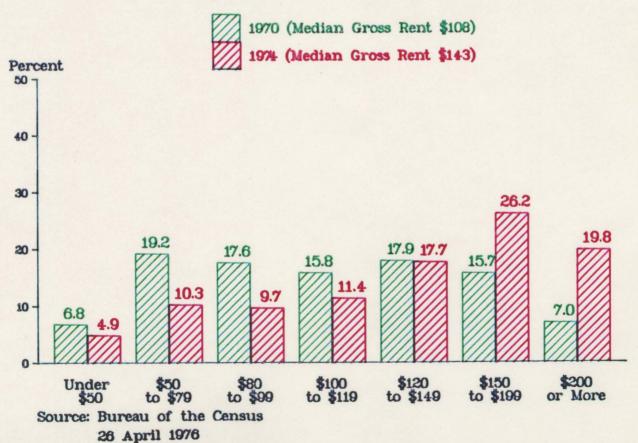
B.7.2—Percent Distribution of Owner-Occupied Housing Units: 1970 and 1974





Renter-OccupiedHousing Units

By Amount of Gross Rent

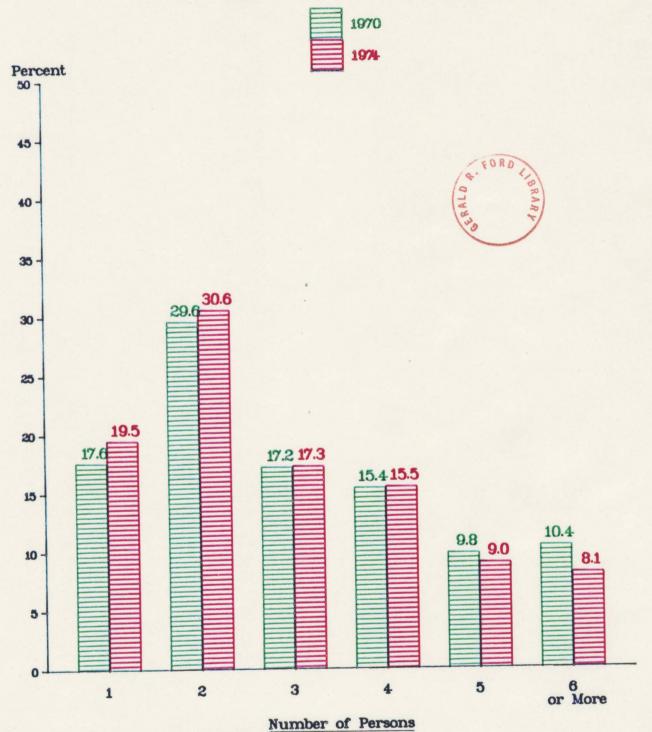




- The median value of the Nation's Owner-Occupied Housing rose from \$17,100 in 1970 to \$27,200 in 1974, an increase of 60 percent.
 - In 1970, the largest proportion (21.2 percent) of all owneroccupied homes were valued at less than \$10,000 while the smallest proportion of homes (9.6 percent) cost \$35,000 or more.
 - Conversely, in 1974, the lowest percentage (7.8 percent) of owneroccupied dwellings were valued under \$10,000 while the highest percentage (30.9 percent) were in the \$35,000 or more category.
- Median Gross Rent for cash rental units increased 32.4 percent between 1970 and 1974.
 - In 1974, 19.8 percent of all renters paid \$200 or more, compared to only 7.0 percent in 1970.

B.7.2-Percent Distribution of All Occupied Housing Units: 1970 and 1974

By Number of Persons Per Household

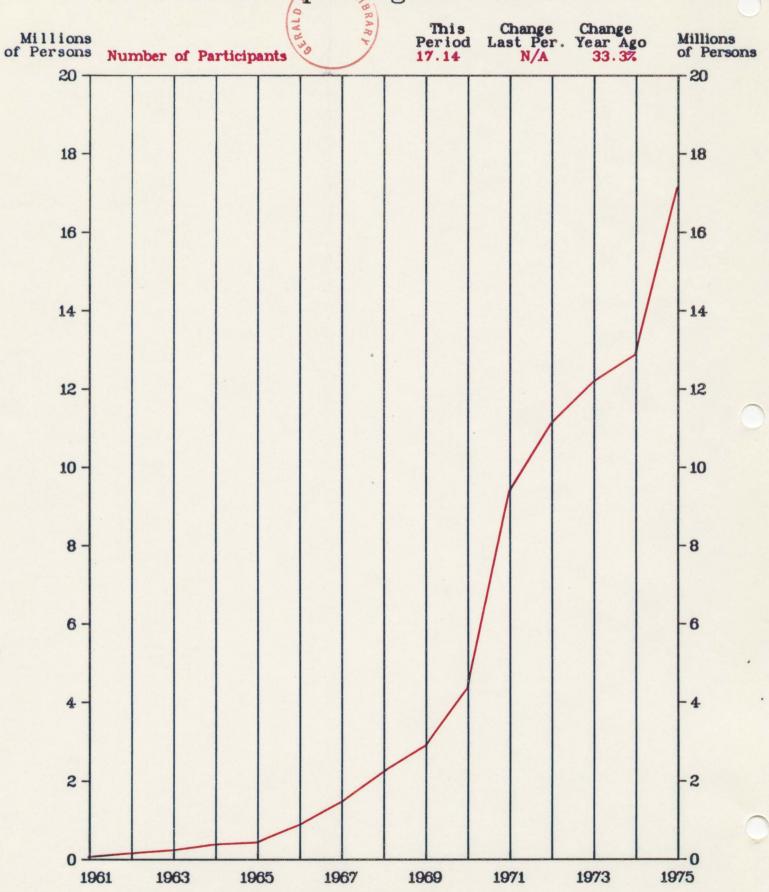


Source: Bureau of the Census



- The median number of persons per household decreased from 2.5 in 1970 to 2.7 in 1974.
 - •The largest percent change between the 2 years occurred in the six or more persons group.
 - In 1970, 10.4 percent of all occupied housing units had six or more persons; decreasing to 8.1 percent, by 1974.
 - In both 1970 and 1974, the largest percentage of units were occupied by 2 persons--29.6 percent and 30.6 percent, respectively.
 - Single person households accounted for 17.6 percent of the total in 1970 and 19.5 percent in 1974.

C.1.7—Average Monthly Number of Participants in Food Stamp Program: 1961 to 1975

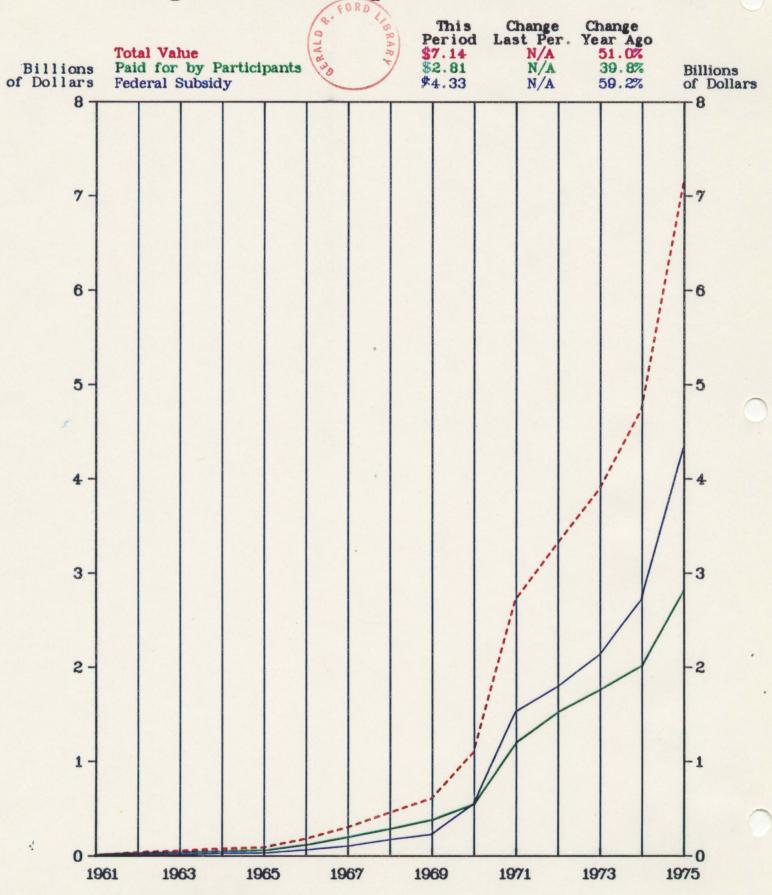


Source: Food and Nutrition Service 26 April 1976



- The average monthly number of participants in the Food Stamp Program has grown from about 50,000 in 1961 to over 17,000,000 persons in 1975.
 - From 1970 to 1971, the average number of participants increased from 4.34 million to 9.36 million, a rise of over 5 million.
 - •The preliminary estimate of 17.14 million persons who participated in 1975 represents a 4.28-million increase over the 1974 total of 12.86 million.

C.1.7-Value of Coupons Issued to Food Stamp Program Participants: 1961 to 1975

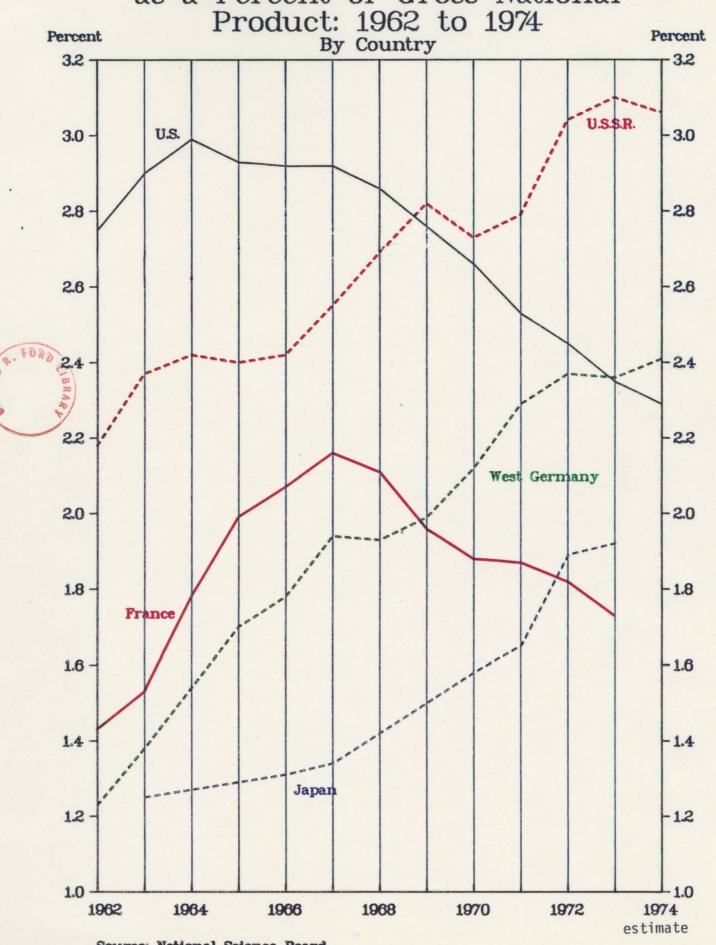


Source: Food and Nutritution Service 26 April 1976



- Since 1970, the total value of coupons issued to food stamp recipients has increased almost 1200 percent.
 - •The largest absolute numerical increase was registered from 1974 to 1975 when the total value of food stamp coupons rose over \$2.4 billion.
 - From 1969 to 1975, the portion of food stamp costs paid for by the Federal Government has risen from 37.9 to 60.6 percent.

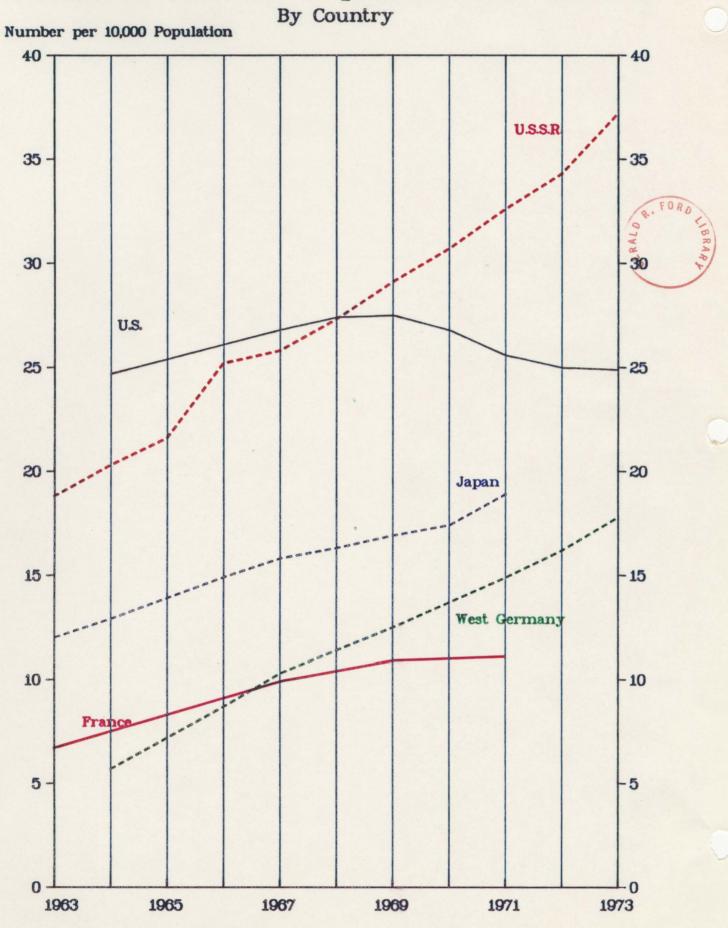
D.2.2—Research and Development Expenditures as a Percent of Gross National





- The fraction of the GNP of the United States devoted to R&D has declined steadily over the last 10 years, falling nearly one-fourth from its peak level in 1964.
 - Primarily due to reduced growth of expenditures by the Federal Government for R&D in the defense and space areas; increases in R&D funds from all other sources combined kept pace with growth in the GNP.
- In the case of France, the only other country of those studied which showed a long-term decline, the reduction appears to result largely from a slower growth in government R&D expenditures for national defense and nuclear energy.
- •Both Japan and West Germany recorded substantial growth in the proportion of the GNP directed to R&D.
 - Underlying this growth were continuous large increases in Research and Development funding from both industry and government.
- The general upward growth in the proportion of the GNP devoted to R&D in the Soviet Union is believed to be valid, although the specific numerical values may differ significantly from the true values.
 - •Differences in the variety of activities regarded as R&D, as well as differences in GNP accounting, make international comparisons involving the U.S.S.R. particularly hazardous.

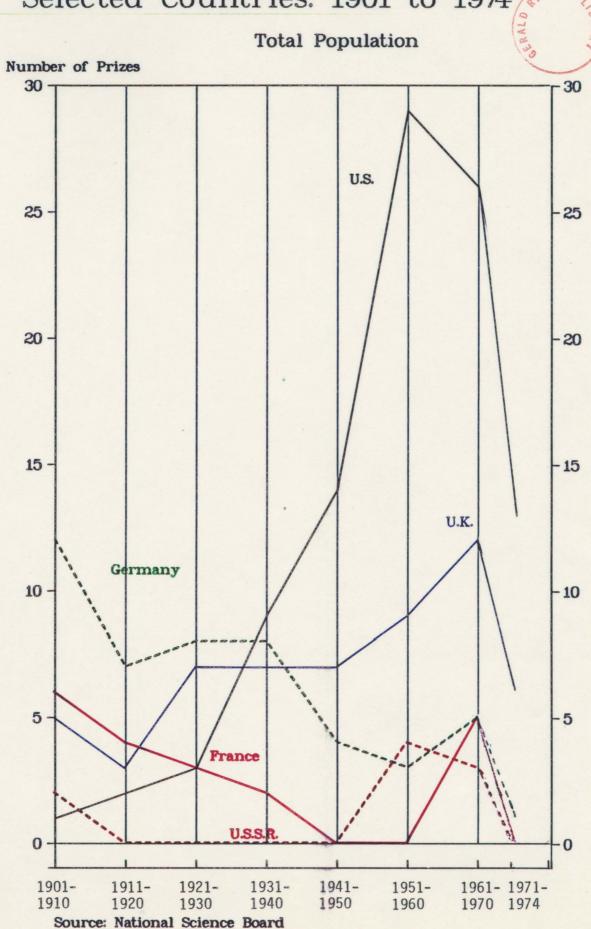
D.2.2-Scientists and Engineers Engaged in Research and Development: 1963 to 1973





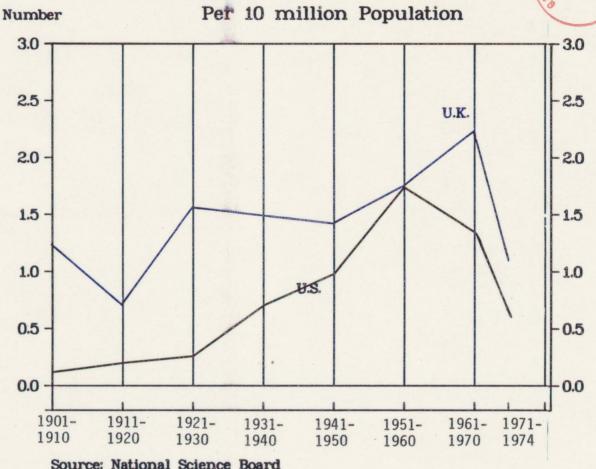
- The United States is the only major R&D-performing nation in which the rate of scientists and engineers engaged in R&D declined from 1970 to 1973.
 - ullet Due in large part to decreases in the employment of scientists and engineers in space and defense-related R&D.
- For each of the other countries, the number of scientists and engineers engaged in R&D increased at a faster rate than the population.

D.2.2-Nobel Prizes in Science for Selected Countries: 1901 to 1974



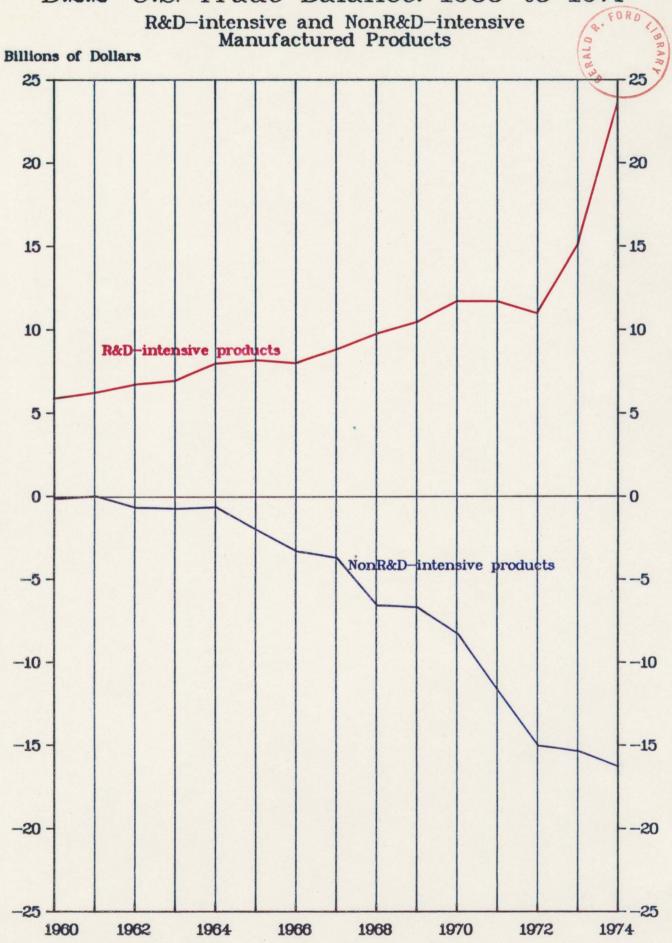
26 April 1976

D.2.2-Nobel Prizes in Science for Selected Countries: 1901 to 1974



- Scientists in the United States have received the largest number of awards over the 1901 to 1974 period as a whole, surpassing all other countries since the 1931 to 1940 decade.
 - Prizes going to the United States scientists, however, declined after the 1951 to 1960 decade, primarily as a result of a smaller number of prizes in the field of physics.
- In relation to population, United States scientists received a smaller fraction of prizes than the United Kingdom over the last decades.

D.2.2-U.S. Trade Balance: 1960 to 1974





- The balance in R&D-intensive products increased fourfold over the 1960 to 1974 period and doubled between 1970 to 1974 alone.
 - Nonelectrical machinery accounted for nearly one-half of the favorable balance.
 - Aircrafts and parts, chemicals, and electrical machinery also contributed to the positive balance.
- The United States had a large and increasing trade deficit in non-R&D intensive products.
 - Principal products responsible for deficit were: motor vehicles, textiles, and metals.