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Infomat

A Weekly Review

Friday, May 9, 1997

OVERVIEW

- **Manufacturers optimistic about coming quarter**

  In April, manufacturers said they were highly satisfied with the level of orders received. They also remained optimistic about production and employment prospects for the next quarter.

- **Housing sector maintains momentum**

  The housing sector maintained its momentum in the first quarter of 1997. The value of residential building permits posted its third consecutive quarterly increase.

- **Slight rise in department store sales**

  Seasonally adjusted department store sales rose marginally in March. Except for a pause in the last half of 1995, department store sales have been on a upward trend since the end of 1993.

- **Employees' earnings up**

  Employees' average weekly earnings were up slightly between January and February and were higher than in February of the previous year.

- **Prices higher for farmers in the West**

  Between the first quarter of 1996 and the first quarter of 1997, farmers in the West (particularly livestock farmers) paid more to do business than farmers in the East.

- **Children faring well in school**

  According to the National Longitudinal Survey of Children and Youth, children aged 4 to 11 generally fared well in school in 1994–95.

Manufacturers optimistic about coming quarter

In the April 1997 Quarterly Business Conditions Survey, manufacturers said they were highly satisfied with current levels of orders received and were still positive about production prospects for the coming quarter. They were less concerned about the current level of finished product inventories, and said they may increase their work force in the next three months. However, they were less satisfied with the number of unfilled orders on their books.

In the April survey, 40% of manufacturers stated that their current level of orders received was rising, compared with 30% in January. This continued the upward trend in the balance of opinion, which reached 28. (The balance was calculated by subtracting the 12% of manufacturers who stated that current levels of orders received were declining from the 40% who said orders received were rising.) This trend is mostly attributable to the transportation equipment industries.

The April balance regarding production prospects in the next quarter dropped 20 points to reach a more normal level of 7. This strong drop followed survey results in the last two quarters that had been exaggerated by the impact of the October labour dispute in the transportation equipment industries. Manufacturers continued to be optimistic about production prospects in the next

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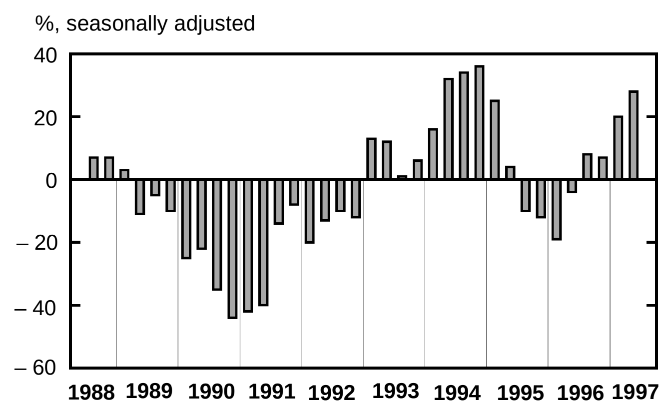
Balance of opinion for current level of orders received



... Manufacturers optimistic about coming quarter

quarter, with 23% expecting to increase production and 61% planning to maintain the same level of production.

The increase in the number of manufacturers stating that finished product inventory levels were too low was offset by an increase in the number stating that inventories were too high. Consequently, the number of manufacturers who felt the current level of finished product inventories was about right dropped 12 points to 69% in April. Once again, the transportation equipment industries were the major contributors to this shift.

In April, the balance of opinion concerning the backlog of unfilled orders was at –7, down from the 1 posted in January. The 14% of manufacturers reporting a lower-than-normal backlog of unfilled orders was twice the proportion who stated their backlog was higher than normal. However, the majority of manufacturers stated that the current backlog of unfilled orders was about normal.

Business Conditions Survey

	1996			1997	
	April	July	Oct.	Jan.	April
Balance of opinion on:					
Production	– 1	6	– 9	27	7
New orders	– 4	8	7	20	28
Unfilled orders	– 2	– 5	– 4	1	– 7
Inventories	– 28	– 13	– 13	– 9	– 5
Employment	– 4	0	3	1	4

Note to readers

The Business Conditions Survey is conducted in January, April, July and October; the majority of responses are recorded in the first two weeks of these months. Results are based on replies from about 5,000 manufacturers and are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than smaller manufacturers.

Except for the data on production difficulties, data in this article are seasonally adjusted.

On the employment side, prospects in manufacturing improved. Close to three-quarters of manufacturers reported that they expect little change in the level of their work force in the coming three months, 15% expect the level to increase, and 11% feel the level will decrease.

A shortage of skilled labour was a concern for manufacturers. In the April survey, 5% of manufacturers expressed concern about this, up from 3% in the last survey. Concern about working capital shortages remained at 2%, while concern about shortages of raw materials increased 1 point from January to 4%.

Available on CANSIM: matrices 2843–2845.

For further information, contact Claude Robillard (613-951-3507; Internet: robilc@statcan.ca), Industry Division.

Housing sector maintains momentum

In the first quarter of 1997, the value of residential building permits rose for the third straight quarter to reach its highest level since the first quarter of 1990. Municipalities issued $4.7 billion worth of building permits for new housing between January and March, up 13.5% from the last quarter of 1996. An increase in the value of permits for single-family dwellings was mainly responsible for the rise. Non-residential construction intentions rose 10.4% to $2.7 billion, led by the industrial and institutional sectors. A decline in permits for commercial construction partly offset these gains.

On a monthly basis, municipalities issued $2.4 billion in permits in March, down 5.0% from February. Housing construction intentions declined for the first time this year, dropping 9.5% to $1.5 billion. Non-residential permits rose 3.1% to $0.9 billion, the third straight monthly increase.

The single-family component, which represents more than 70% of the total residential value, was primarily responsible for the first-quarter gains in residential construction intentions. Plans for single-family dwellings increased 18.5% to $3.6 billion—an exceptionally high level. Permits for multi-family dwellings increased slightly (+0.8%).

The value of residential building permits increased in every province and territory except British Columbia, Prince Edward Island and the Yukon. Ontario posted the best quarterly performance (+20.4%), mainly due to its single-family component. Alberta recorded a sharp rise in its residential sector (+32.5%), with increases in both single- and multiple-family dwellings. British Columbia reported the most significant decrease (–4.5%).

Note to readers

The Building and Demolitions Permits Monthly Survey covers 2,400 municipalities which represent 93% of the population. It provides an early indication of building activity. The communities representing the other 7% of the population are very small, and their levels of building activity have little impact on the total.

The value of planned construction activities excludes engineering projects (waterworks, sewers, culverts, etc.) and land.

Unless otherwise stated, this release presents seasonally adjusted data, which ease comparisons by removing the effects of seasonal variations. The annual rate is a monthly figure that has been seasonally adjusted and multiplied by 12 to reflect annual levels.

The increase in non-residential construction intentions was largely due to the 36.2% rise in the institutional component, where proposed construction projects in the educational sector and a surge in small projects contributed to the substantial growth. The value of permits in the industrial component rose 18.7%, mainly due to new construction in the manufacturing industry. A lack of construction intentions in the trade and services sector caused the commercial component to drop (–1.9%) for the second consecutive quarter.

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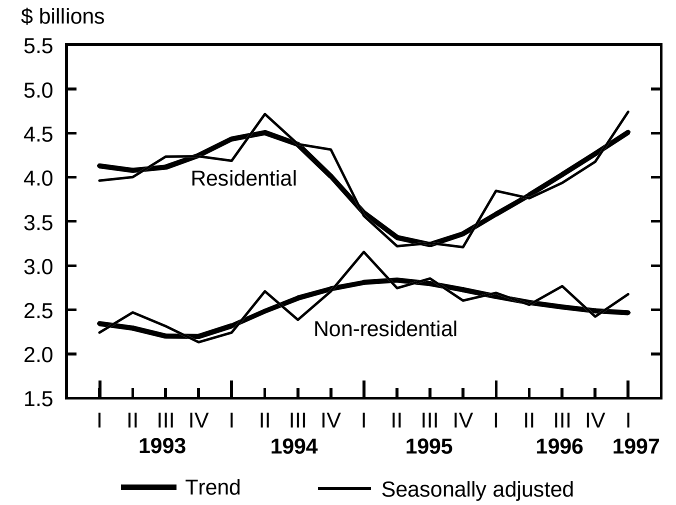
... Housing sector maintains momentum

With a 34.8% increase, Ontario was the largest contributor to the quarterly increase in the non-residential sector. The push in Ontario came mainly from institutional projects, which reached $313 million. Manitoba also recorded a notable gain (+39.5% to $90 million), a level last seen in the second quarter of 1994. By contrast, British Columbia and Nova Scotia reported the most significant decreases in the non-residential sector (–14.1% and –44.7% respectively), as the industrial, commercial and institutional components declined.

Available on CANSIM: matrices 80 (levels 3–7, 16–22 and 24–32), 129, 137, 443, 989–992, 994, 995 and 4073.

The March 1997 issue of ***Building permits*** *(64-001-XPB, $25/$248) will be available shortly. For further information, contact Joanne Bureau (613-951-9689; Internet: burejoa@statcan.ca). For analytical information, contact Sylvain Cloutier (613-951-2025), Investment and Capital Stock Division.*

Value of building permits



Building permits, March 1997
Seasonally adjusted

	Total		Residential		Non-residential	
	$ millions	% change, previous month	$ millions	% change, previous month	$ millions	% change, previous month
Canada	**2,431**	**– 5.0**	**1,493**	**– 9.5**	**938**	**3.1**
Newfoundland	12	– 54.5	4	– 80.7	8	29.8
Prince Edward Island	7	143.0	6	229.0	1	2.0
Nova Scotia	47	– 42.5	40	– 40.1	7	– 53.3
New Brunswick	52	5.9	13	– 62.1	38	189.3
Quebec	388	– 14.6	206	– 12.3	182	– 17.1
Ontario	978	– 7.4	596	– 13.2	382	3.3
Manitoba	57	– 17.8	32	– 4.4	25	30.3
Saskatchewan	54	40.9	18	– 16.8	36	113.4
Alberta	311	– 11.6	198	– 17.3	113	0.5
British Columbia	521	23.0	376	23.2	144	22.3
Yukon	2	– 31.0	2	– 19.9	0	– 68.1
Northwest Territories	2	28.8	2	14.9	1	123.9

Slight rise in department store sales

In March, seasonally adjusted department store sales rose 0.7% to reach $1.3 billion. Sales were down from February, when a 2.2% increase was recorded. First quarter seasonally adjusted sales closed at $3.8 billion, up 8.7% compared with the first quarter of 1996. With the exception of a pause in the last half of 1995, department store sales have followed an upward trend since the end of 1993.

Compared with March 1996, year-over-year seasonally adjusted sales were up 10.4% following a 9.2% increase in February.

Note to readers

The major department stores are The Bay, Eaton and Sears. The discount stores are K-Mart, Wal-Mart and Zellers.

Unadjusted sales in March 1997 were $1.1 billion (+11.4%) higher than a year earlier. This increase is partly attributable to the Easter holiday, which fell in March this year. Easter typically generates higher sales for the month in which it falls.

Gains in unadjusted year-over-year sales were registered across the country. Nova Scotia (which had one new store), Ontario and Alberta posted the highest increases.

(continued on page 4)

... Slight rise in department store sales

Department store sales including concessions, March 1997
Unadjusted

	March 1997	March 1996 to March 1997	Q1 1997	Q1 1996 to Q1 1997
	$ millions	% change	$ millions	% change
Canada	**1,084.7**	**11.4**	**2,753.9**	**8.4**
Newfoundland and Prince Edward Island	19.1	8.3	47.5	5.8
Nova Scotia	35.0	14.9	82.8	9.1
New Brunswick	24.1	9.0	58.8	3.9
Quebec	197.4	7.7	504.9	5.4
Ontario	453.6	13.6	1,154.9	9.8
Manitoba	45.8	10.5	116.2	8.2
Saskatchewan	34.2	11.1	88.4	9.7
Alberta	122.9	13.1	308.4	10.2
British Columbia, Yukon, Northwest Territories	152.7	9.0	392.1	7.4

All 10 census metropolitan areas reported higher year-over-year unadjusted sales. Halifax–Dartmouth—with one new store—recorded the largest increase, climbing 16.9% from March 1996. In Calgary, sales rose 15.2% compared with a year earlier. Increases were also recorded for Ottawa–Hull (+13.9%), Hamilton (+12.8%) and Toronto (+11.9%). Québec posted a modest 2.4% year-over-year increase, reversing February's sharp 9.4% decline.

Available on CANSIM: matrices 111–113.

*The March 1997 issue of **Department store sales and stocks** (63-002-XPB, $17/$165) will be available shortly. For further information, contact Louise Généreux (613-951-3549), Distributive Trades Division.*

Employees' earnings up

Employees' average weekly earnings increased for the third consecutive month in February. Average weekly earnings rose 0.3%, led by higher earnings for employees in wholesale trade; finance, insurance and real estate; and mining, quarrying and oil wells. In these industries, as well as in business services, employees have all contributed to the earnings growth over the past year. Employees earned 3.6% or $20.84 more on average this February than they did in February 1996.

The year-over-year earnings difference (+4.3%) for employees in public administration was attributable to the Ontario public servants' strike in February 1996, which suppressed average earnings, and is not indicative of the trend in this industry.

The number of hours worked by employees paid by the hour was up slightly to 31.3 hours per week on average for full- and part-time employees. The number of hours worked per week

Average weekly earnings, February 1997
Seasonally adjusted

	Industrial aggregate $	% change, previous month	% change, previous year
Canada	**598.72**	**0.3**	**3.6**
Newfoundland	529.22	0.3	– 2.0
Prince Edward Island	488.19	0.7	4.2
Nova Scotia	497.93	– 0.1	2.5
New Brunswick	521.16	0.7	3.1
Quebec	562.64	0.3	1.4
Ontario	641.87	0.5	4.5
Manitoba	523.57	0.2	2.5
Saskatchewan	529.57	0.4	7.7
Alberta	594.90	0.6	6.8
British Columbia	615.07	0.1	2.9
Yukon	697.92	– 3.6	0.0
Northwest Territories	728.29	– 0.4	1.0

Note to readers

In addition to the February 1997 preliminary results, this month's release of the Survey of Employment, Earnings and Hours (SEPH) contains revised estimates for December 1996 and January 1997. Previously published estimates for December and January were affected by a processing error that has been corrected. The error mainly affected the employment figures, and had some small impacts on average earnings and hours. The impact of these revisions on the monthly gross domestic product and the fourth quarter labour income estimates is very small.

In the January 1997 release, employment, for all industries, was reported to have increased by 133,000 in December and 9,000 in January. The corrected estimates reflect a more modest growth of 31,000 in December and a gain of 17,000 in January. Average weekly earnings were virtually unaffected. The monthly increase in average weekly earnings between November and December was unchanged at 0.5%. Similarly, average weekly hours at the all-industries level were not affected by the revisions.

The employment, earnings and hours program is in the final phase of a major, multi-year re-engineering project designed to improve estimates of the level of business payrolls and paid employment through the use of administrative records, as well as to reduce reporting burden on businesses. Significant methodological improvements in obtaining paid employment levels have already been incorporated—most recently in May 1996—when the program expanded its use of administrative records. With the change in methodology, there is a risk that employment estimates from the administrative records show a different seasonal pattern than the previous questionnaire data, which can only be assessed within the context of a longer time period. Statistics Canada will monitor these impacts and help users correctly interpret its data. In the interim, it is recommended that data from SEPH, particularly employment, be used in the context of longer time periods or for obtaining the detailed industrial distribution of employment. Users are reminded that the Labour Force Survey remains the Agency's foremost and up-to-date source of national and provincial estimates of employment.

Statistics Canada regrets any inconvenience that this error may have caused.

(continued on page 5)

... Employees' earnings up

continued upward, following the trend that began in the summer of 1996. Recent increases in average hours worked were notable for employees paid by the hour in mining, quarrying and oil wells; manufacturing; business services; and health and social services. The higher average hours were partly due to increases in overtime hours. Recent growth in hours worked, compared with the previous year, is one factor contributing to higher weekly earnings.

Available on CANSIM: matrices 4285–4466, 9438–9452, 9639–9664 and 9899–9911.

*Also see the monthly publication **Employment, earnings and hours** (72-002-XPB, $31/$310) and the historical publication **Annual estimates of employment, earnings and hours 1983–1995** (diskette: 72F0002XDE, $120). For further information, contact Peter Lys (613-951-4071; fax: 613-951-4087; Internet: labour@statcan.ca), Labour Division.*

Prices higher for farmers in the West

Between the first quarter of 1996 and the first quarter of 1997, farmers in the West—particularly livestock farmers—paid more to do business than farmers in the East. In Western Canada, farm input prices rose 2.9%, compared with 1.8% in Eastern Canada. For Canada as a whole, farmers saw a 2.4% increase in costs compared with the previous year, despite a decline in interest charges.

In the West, farmers faced the highest price increases in animal production (+8.9%) and in building and fencing (+6.3%). Higher prices for feeder cattle, weanling pigs, and poultry caused the rise in animal production, while higher costs for building materials contributed most to the increase in building and fencing. Western farmers also paid more for machinery and motor vehicles, and supplies and services. However, they did benefit from lower prices for farm rent and lower interest costs, which dropped 13.2% due to lower non-mortgage loan rates.

Like farmers in the West, farmers in the East also paid more for feeder cattle, weanling pigs, and poultry. But due to lower prices for animal feed, the overall increase in the animal production index (+2.5%) was more moderate than in the West. Higher-priced building materials contributed to a 4.3% increase in building and fencing. Eastern farmers paid more for property taxes in the first quarter of 1997 than they did in the same period a year earlier. They also profited for lower costs for non-mortgage loans, which helped bring annual interest costs down 13.4%.

Nationally, higher prices for inputs into animal production (+5.1%) contributed most to the year-over-year increase. Farmers also faced higher prices for machinery and motor vehicles, mostly because of higher prices for gasoline and diesel fuel. They also had to spend more for building materials, which contributed to a 5.1% rise in building and fencing. On the other hand, with lower costs for non-mortgage loans, farmers continued to pay less for interest (–13.2%).

During the first three months of 1997, farmers paid 0.9% more to do business than they did in the previous three-month period. However, once again, it was Western farmers who faced the highest price increases. Input prices rose 1.3% in the West, compared with 0.2% in the East. Eastern farmers benefited from lower prices for farm wages, building and fencing, and inputs into crop production. Western farmers saw lower estimated prices for farm rent; however, this increase was offset by an increase in machinery and motor vehicles, animal production, and farm wage costs.

Available on CANSIM: matrices 550–582 (level 7) and 2050–2063.

*The first quarter 1997 issue of **Farm input price indexes** (62-004-XPB, $25/$83) will be available in June. For further information, contact the Client Services Unit (613-951-9606), Prices Division.*

Children faring well in school

According to the National Longitudinal Survey of Children and Youth (NLSCY), Canadian children aged 4 to 11 generally fared well in school in 1994–95. Few children were repeating grades, parents were generally involved in their children's education, and serious disciplinary problems were relatively rare.

Teachers reported that only a small proportion of children in the NLSCY had repeated a grade. Less than 2% of children had repeated their last grade and only about 4% had repeated any grade. Students in Grades 1 to 3 were more likely to repeat a grade than those in Grades 4 to 6. For children from families with the lowest socio-economic status, the average rate of having repeated any grade was about twice as high as the overall rate.

In general, teachers reported that parents play an active role in their children's education. For most children (94%), at least one parent had attended the regular parent–teacher conference. Activities such as fund-raising and field trips were more conducive

Note to readers

The National Longitudinal Survey of Children and Youth (NLSCY), conducted by Statistics Canada in collaboration with Human Resources Development Canada, is a comprehensive survey examining a variety of important factors thought to influence child development.

In 1994–95, the NLSCY collected information on nearly 23,000 children in Canada ranging in age from birth to 11 years. The survey will collect information on these children every two years as they progress into youth and then adulthood. The school component collected information about children aged 4 to 11 from the teachers and principals for the 1994–95 school year.

The NLSCY includes a measure of socio-economic status (SES) that combines family income, parents' occupation and parents' education. Children were divided into five equally sized groups (quintiles) according to their family's SES ranking. Children whose families were in the top 20% of SES scores were considered to be from the highest SES families, while those in the bottom 20% were from families with the lowest SES.

(continued on page 6)

... Children faring well in school

to parental involvement than activities requiring an ongoing commitment (school advisory committees, sports and plays, for example).

Principals reported that the most common disciplinary problems involved verbal or physical conflicts and groups of students harassing individual students. They also reported that they never or rarely had to discipline students for more serious problems such as drug use, theft and smoking on school property.

One in ten children received some form of remedial education. About half of these children had a learning disability, while another one-quarter had an emotional or behavioural problem. Remedial education was usually delivered primarily in a regular classroom with part-time attendance in a specialized classroom (59%) or exclusively in a regular classroom (16%). About 7% of the children in the study were in some type of program for gifted children because of their advanced intellectual or artistic abilities. Most of these students were educated in their regular classroom (46%) or in their regular classroom with some limited time in a special class or resource room (33%).

Teachers reported that the resources in their classrooms adequately or completely met their needs for most types of materials and equipment; however, the majority felt that computers, software and science equipment did not. Only 4 in 10 teachers thought that computers adequately or completely met their instruction needs, while just over one-third felt that computer software was adequate. Less than half (48%) felt classroom science equipment to be adequate.

For further information, contact Patrice de Broucker (613-951-3999; fax: 613-951-9040; Internet: debrpat@statcan.ca), Centre for Education Studies, or Allen Zeesman (819-994-3039), Applied Research Branch, Human Resources Development Canada.

New from Statistics Canada

Successful entrants: Creating the capacity for survival and growth

May 1997

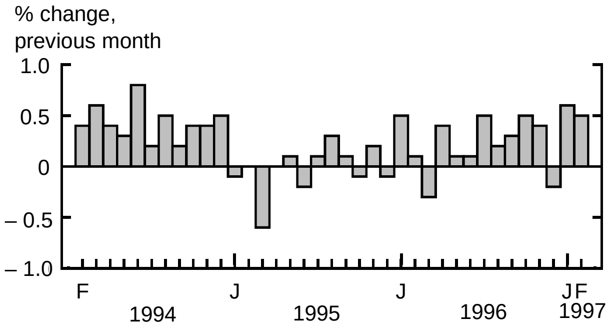
Successful entrants: Creating the capacity for survival and growth is second in a series of studies on small- and medium-sized businesses. Although new firms have enormous potential for contributing to the economy, most do not succeed. *Successful entrants* profiles the characteristics of new firms that do survive. It also investigates the differences between the new firms that survived but achieved little growth, and those that survived and grew rapidly.

The first study in the series, *Strategies for success: A profile of growing small- and medium-sized enterprises* (61-523-RPE), provides an overview of the strategies and activities of a group of typically "established" small- and medium-sized firms that grew during the last half of the 1980s. The third study, *Failing concerns: Business bankruptcy in Canada* (61-525-XPE), investigates which characteristics are associated with failure and is scheduled for release later this year.

Successful entrants: Creating the capacity for survival and growth *(61-524-XPE, $35) is now available. For more information, contact Joanne Johnson (613-951-3547; Internet: johnjoa@statcan.ca) or John Baldwin (613-951-8588; Internet: baldjoh@statcan.ca), Analytical Studies Branch.*

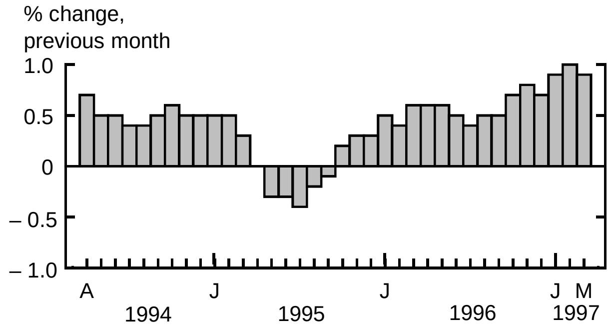
Current trends

Gross domestic product



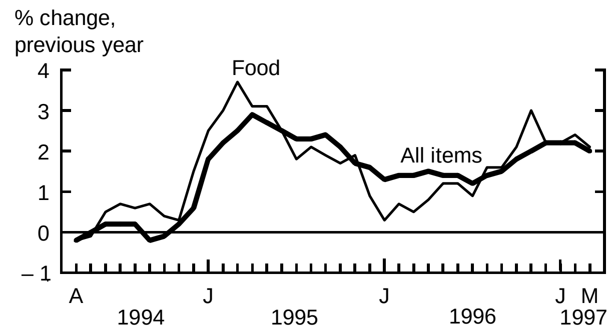
Real gross domestic product at factor cost increased 0.5% between January and February.

Composite Index



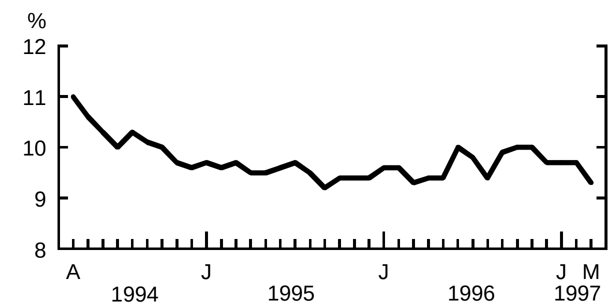
The Composite Index grew by 0.9% in March.

Consumer Price Index



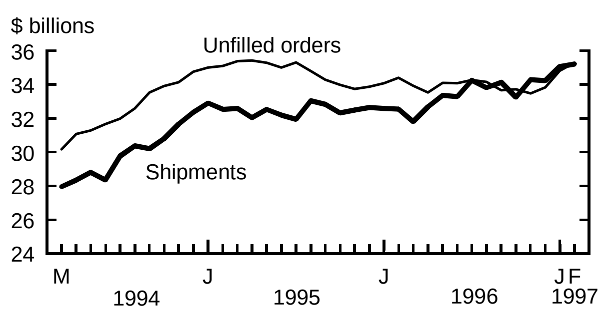
Consumers paid 2.0% more for goods and services in March 1997 than the year before. Food prices rose by 2.1%.

Unemployment rate



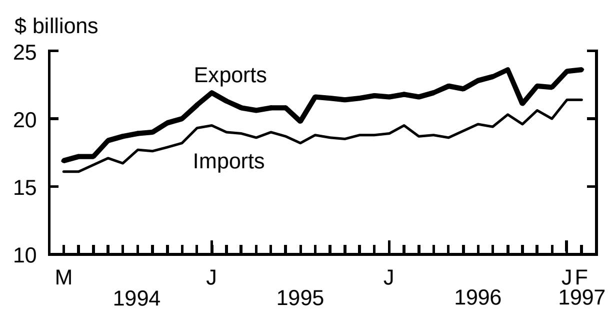
In March, the unemployment fell to 9.3%.

Manufacturing



Manufacturers' shipments rose 0.6% in February to $35.2 billion. The level of unfilled orders increased 0.8% to $35.3 billion.

Merchandise trade



In February, the value of merchandise exports increased 0.6% from January to $23.6 billion. Imports held steady at $21.4 billion.

Note: *All series are seasonally adjusted except the Consumer Price Index.*

Latest monthly statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product ($ billion, 1986)	February	564.8	0.5%	3.5%
Composite Index (1981=100)	March	190.6	0.9%	8.8%
Operating profits of enterprises ($ billion)	Q4 1996	25.7	5.7%	10.4%
Capacity utilization (%)	Q4 1996	84.8	0.7†	2.4†
DOMESTIC DEMAND				
Retail trade ($ billion)	February	19.1	1.1%	7.7%
New motor vehicle sales (thousand of units)	February	111.4	5.1%	14.5%
LABOUR				
Employment (millions)	March	13.8	0.4%	1.1%
Unemployment rate (%)	March	9.3	– 0.4†	– 0.1†
Participation rate (%)	March	64.5	– 0.1†	– 0.3†
Labour income ($ billion)	January	36.8	0.1%	3.9%
Average weekly earnings ($)	February*	598.72	0.3%	3.6%
INTERNATIONAL TRADE				
Merchandise exports ($ billion)	February	23.6	0.6%	7.8%
Merchandise imports ($ billion)	February	21.4	– 0.3%	10.1%
Merchandise trade balance (all figures in $ billion)	February	2.2	0.2	– 0.3
MANUFACTURING				
Shipments ($ billion)	February	35.2	0.6%	8.2%
New orders ($ billion)	February	35.5	– 2.0%	7.9%
Unfilled orders ($ billion)	February	35.3	0.8%	2.6%
Inventory/shipments ratio	February	1.29	0.00	– 0.11
PRICES				
Consumer Price Index (1986=100)	March	137.6	0.2%	2.0%
Industrial Product Price Index (1986=100)	March	130.2	0.2%	0.9%
Raw Materials Price Index (1986=100)	March	135.8	– 1.0%	1.4%
New Housing Price Index (1986=100)	February	132.4	0.2%	0.0%

Note: *All series are seasonally adjusted with the exception of the price indexes.*
* *new this week*
† *percentage point*

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A weekly review

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Publications released from May 2 to 8, 1997

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription Canada (C$)	Outside Canada (US$)
AGRICULTURE				
Production of poultry and eggs	1996	23-202-XPB	38	38
BALANCE OF PAYMENTS				
Canada's international transactions in securities	February 1997	67-002-XPB	18/176	18/176
CANADIAN CENTRE FOR JUSTICE STATISTICS				
Juristat: Crime in major metropolitan areas, 1991–1995, Vol. 17, no. 5	1991–1995	85-002-XPE	10/93	10/93
DISTRIBUTIVE TRADES				
Department store sales and stocks	February 1997	63-002-XPB	17/65	17/65
Retail trade	February 1997	63-005-XPB	21/206	21/206
INDUSTRY				
Asphalt roofing	March 1997	45-001-XPB	7/62	7/62
Cement	March 1997	44-001-XPB	7/62	7/62
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