Catalogue 11-002-XPE (Français 11-002-XPF) ISSN 0380 9537

Infomat

A Weekly Review

Friday, December 13, 1996

OVERVIEW

- **Labour market little changed**

  Labour market conditions were little changed in November. The level of employment stayed stable, and the unemployment rate remained at 10.0%.

- **Residential sector behind rise in building permits**

  A higher number of applications for residential building permits fueled an increase in the overall value of permits issued by municipalities in October.

- **Industrial capacity use rises**

  In the third quarter, industries increased their use of production capacity for a second straight quarter.

- **Information technology sector undergoes rapid growth**

  Between 1990 and 1995, as a result of rapid growth, the information technology sector has become a significant part of the Canadian economy.

- **Housing prices fall slower than before**

  The rate of decline in housing prices reported over the last two years continued to slow in October.

- **Number of help-wanted ads increases again**

  In November, for the second consecutive month, the number of help-wanted advertisements in newspapers increased.

- **1997 Release dates**

Labour market little changed

Labour market conditions were little changed in November. There was no change in the estimated level of employment, and the unemployment rate remained at 10.0%. Since April, employment has shown no clear trend, with a net gain of only 35,000 jobs. This follows a period of steady growth in the second half of 1995 and in the first four months of 1996, when gains totalled 202,000 (+1.5%).

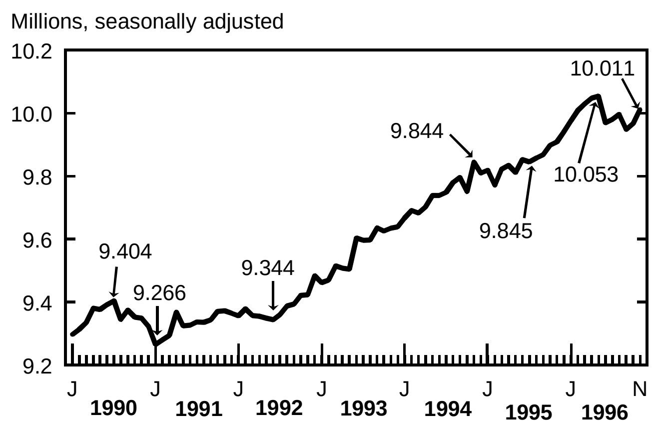
An increase of 30,000 part-time jobs in November was mostly offset by a decline in full-time work. So far this year, part-time employment has grown by 49,000 (+1.9%), with all the gains recorded in recent months. In contrast, full-time employment has risen by 106,000 (+1.0%). These gains occurred early in the year, with little net change since April.

Adult women accounted for the majority of the increase in part-time employment. Over the year, employment gains made by adult women (+95,000) have been about equally split between full- and part-time jobs.

Youth employment has changed little over the year, and November was no exception. However, a recent increase in the number looking for work has pushed youth unemployment rate up to 17.2%.

(continued on page 2)

Employment in service-producing industries



Statistics Canada Statistique Canada

Canada

... Labour market little changed

Employment among adult men remained stable, following an increase in October. Over the year adult men have gained 71,000 jobs, almost all full-time.

In the service sector, employment grew by 44,000 in November, its strongest monthly increase this year. However, on a year-to-date basis, employment in this sector is up only 0.7% (+70,000), considerably outpaced by the 2.8% growth in the goods-producing sector (+102,000). November's service gains were in the community, business and personal service industries; trade; and public administration.

Employment was little changed in the goods-producing sector in November. Manufacturing, which accounts for almost 6 in 10 jobs in this sector, remained unchanged. In agriculture, employment edged down by 8,000, following gains in October related to late harvests.

Neither the public nor the private sectors experienced much change in employment in November. However, within the private sector, a gain of 40,000 self-employed workers offset a decline of 37,000 paid employees. On a year-to-date basis, employment in the private sector has grown by 202,000, with the number of employees increasing by 108,000 (+1.2%) and self-employment up 94,000 (+4.2%). In contrast, the public sector recorded employment losses of 46,000 (-2.2%) over the same period.

Only two provinces, Alberta (+10,000) and British Columbia (+11,000) registered employment gains in November. Both provinces have enjoyed above-average employment growth this year (+3.3% and +3.6% respectively), continuing the pattern established since the beginning of the 1990s. Employment fell in Saskatchewan (-5,000) and Prince Edward Island (-1,000); there was little change in the other provinces.

Available on CANSIM: matrices 2074, 2075, 2078-2107 and table 00799999.

The November 1996 issue of ***The labour force*** *(71-001-XPB, $23/$230) will be available the third week of December. For further information, contact Doug Drew (613-951-4720), Vincent Ferrao (613-951-4750) or the LFS information line (613-951-9448), Household Surveys Division. (See also "Current trends" on page 8.)*

Labour Force Survey, November 1996
Seasonally adjusted

	Labour force		Employment		Unemployment	
	'000	% change, previous month	'000	% change, previous month	'000	Rate (%)
Canada	**15,257**	**0.1**	**13,725**	**0.1**	**1,532**	**10.0**
Newfoundland	233	-1.7	190	0.0	43	18.5
Prince Edward Island	70	-0.5	59	-1.0	11	15.3
Nova Scotia	441	-0.2	384	0.0	57	12.9
New Brunswick	356	0.3	310	0.0	46	12.9
Quebec	3,654	0.1	3,193	-0.2	461	12.6
Ontario	5,893	0.1	5,347	-0.1	546	9.3
Manitoba	576	0.9	532	0.2	44	7.6
Saskatchewan	487	-1.4	458	-1.1	29	6.0
Alberta	1,526	0.0	1,426	0.7	100	6.6
British Columbia	2,020	0.2	1,829	0.6	191	9.5

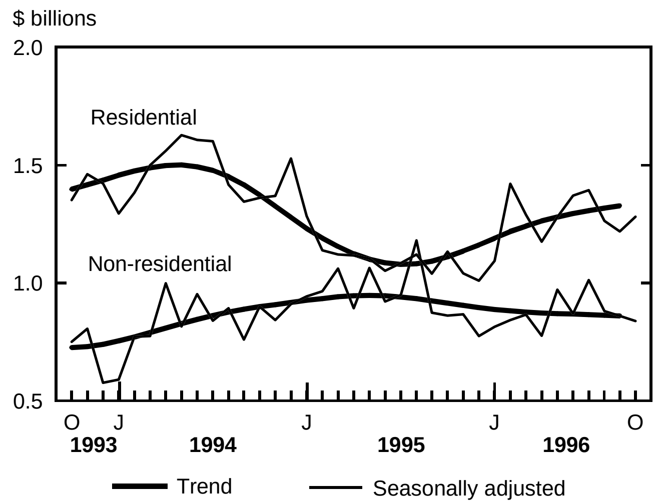
Residential sector behind rise in building permits

Exceptionally low mortgage rates and an upbeat housing resale market boosted applications for residential building permits in October, fueling a 2.1% increase in the overall value of permits issued by municipalities. Non-residential permit applications dropped for the third consecutive month (-2.4%) to their third-lowest level this year.

Residential building intentions jumped 5.2% to $1.3 billion in October, following two consecutive monthly drops. Multi-family dwelling permits led the surge, up 14.3%, while single-family dwelling intentions climbed 2.1%. The value of planned residential building construction over the first 10 months of 1996 was 14.2% higher than in the same period in 1995.

A sharp decline in commercial intentions (-14.3%) in October accounted entirely for the slump in the non-residential sector. Intentions increased in the industrial (+28.2%) and institutional (+5.3%) components. Non-residential intentions have shown signs of weakness since mid-1995 and over the first 10 months of 1996,

Value of building permits



(continued on page 3)

... Residential sector behind rise in building permits

they have slipped 10.1% compared with the same period last year. Slumping non-residential intentions were consistent with the low level of business sector confidence, as expressed in the quarterly Conference Board of Canada survey. Government spending cutbacks may also be affecting this sector.

British Columbia led all regions in housing intentions, up 6.8% in October. Alberta (+7.7%) and Ontario (+4.3%) were also among the six provinces reporting increases. Prince Edward Island, the Yukon and the Northwest Territories suffered the largest declines in the value of residential permits.

Alberta (+83.0%) and Nova Scotia (+36.2%) posted the country's only increases in non-residential permit issuances. The steepest declines in dollar terms were registered in British Columbia and Quebec. Also notable was a 42.3% drop in Saskatchewan in October, caused by a sharp decline in industrial and commercial intentions. That province's industrial intentions had risen significantly the previous month.

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

*The October 1996 issue of **Building permits** (paper version: 64-001-XPB, $24/$240; microfiche version: 64-001-XMB, $25/$135) will be available shortly. For further information, contact Joanne Bureau (613-951-9689; Internet: burejoa@statcan.ca), Investment and Capital Stock Division.*

Building permits, October 1996
Seasonally adjusted

	Total		Residential		Non-residential	
	$ millions	% change, previous month	$ millions	% change, previous month	$ millions	% change, previous month
Canada	**2,120**	**2.1**	**1,281**	**5.2**	**839**	**-2.4**
Newfoundland	21	9.7	15	15.9	7	-1.4
Prince Edward Island	7	-64.6	4	-51.1	3	-74.8
Nova Scotia	57	20.8	36	13.5	21	36.2
New Brunswick	36	6.4	21	15.8	16	-3.9
Quebec	392	-3.7	209	2.7	183	-10.2
Ontario	760	2.1	477	4.3	283	-1.5
Manitoba	42	0.2	23	21.5	19	-17.5
Saskatchewan	42	-28.9	19	0.3	24	-42.3
Alberta	279	32.7	152	7.7	127	83.0
British Columbia	477	-0.9	322	6.8	155	-13.7
Yukon	4	-49.6	3	-14.7	2	-70.1
Northwest Territories	1	-58.7	0	-96.8	1	-18.1

Industrial capacity use rises

In the third quarter of 1996, industries increased their use of production capacity for a second consecutive quarter. They operated at 83.8%, a marked increase from 82.5% in the previous quarter. However, there is still a gap of three percentage points between the current level and the 1988 peak of 86.8%.

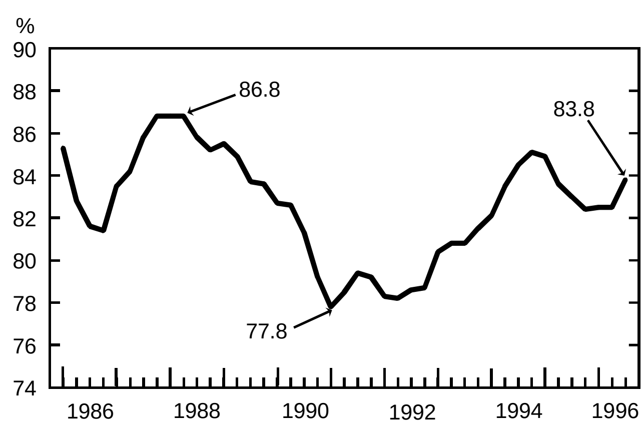
Manufacturers were among the major contributors to this increase in capacity use and, according to the latest Business Conditions Survey, they appear likely to continue stepping up production during the next three months. However, this increase in economic activity should not cause inflation to rise. The annual rate of increase in the consumer price index for October (excluding food and energy) was 1.3%, close to its lowest level for the year. Industrial product prices fell in October, the seventh decrease in 1996, and the price of raw materials (excluding mineral fuels) also fell.

Furthermore, increased business spending on plant and equipment was one of the factors leading to the rise in manufacturing production and, in view of the upswing in profits recorded in the third quarter, companies will probably be encouraged to continue investing. This increased capacity will allow for further expansion of output without risk of inflationary pressures.

Note to readers

An industry's capacity use is the ratio of its actual output to its estimated potential output. Statistics Canada derives estimates of an industry's potential output from measures of its capital stock.

Industrial capacity utilization rate



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... Industrial capacity use rises

Manufacturers' use of capacity advanced for a second straight quarter, bringing the third-quarter level to 84.3%. Seventeen of the 22 industry groups in manufacturing raised their level of capacity use. Benefitting from increased residential construction activity during the third quarter, producers of non-metallic mineral products—materials such as concrete and glass—recorded one of the most notable increases (+4.9 percentage points), bringing their rate of capacity use to 82.7%. Wood industries, sawmills in particular, also benefitted from the upturn in home building as well as from strong exports. Exports were a significant factor in increased production and rising rates of capacity use in the rubber, plastics, and paper and allied products industries.

Other notable increases in the third quarter occurred in the furniture and fixture industries, where the 2.6 percentage point increase in capacity use brought the rate to 91.6%—a new historical peak for the series—and in the primary metal industries, where capacity use rose 2.1 percentage points to 95.8%.

Among industries showing a decline in capacity use were the transportation equipment industries and the refined petroleum and coal products industries.

Capacity use in the mining, quarrying and oil wells sector increased 2.9 percentage points to 87.0%, due mainly to the mining and quarrying industries, where increased drilling activity led to a rise of 7.3 percentage points in the rate of capacity use, bringing the level to 90.8%.

For the third consecutive quarter, the construction industries increased their use of capacity. The continued improvement in residential construction, combined with a slight contraction of capacity, raised the rate of capacity use to 79.0% (+1.6 percentage points).

In electric power and gas distribution systems, a decrease in capacity use in gas distribution systems (-0.3 percentage points to 77.3%) was more than offset by an increase in electric power systems (+0.9 percentage points to 87.5%), bringing the rate for the sector as a whole up 0.7 percentage points to 86.0%.

Available on CANSIM: matrix 3140.

For further information, contact Susanna Wood (613-951-0655), Investment and Capital Stock Division.

Industrial capacity utilization rates

Industry	3rd quarter 1995	2nd quarter 1996	3rd quarter 1996	Change* previous year	Change* previous quarter
Non-farm goods-producing	**83.0**	**82.5**	**83.8**	**0.8**	**1.3**
Logging and forestry	88.1	76.6	75.9	-12.2	-0.7
Mining, quarrying & oil wells	84.8	84.1	87.0	2.2	2.9
Manufacturing	83.9	83.3	84.3	0.4	1.0
Durable goods	83.9	83.3	83.9	0.0	0.6
Non-durable goods	84.0	83.3	84.8	0.8	1.5
Construction	76.4	77.4	79.0	2.6	1.6
Electric power and gas distribution systems	86.0	85.3	86.0	0.0	0.7

* *Change expressed in percentage points.*

Information technology sector undergoes rapid growth

Information technology is a dynamic, multi-faceted sector of the Canadian economy. It is at the leading edge of technology, exhibiting rapid and, at times, radical change.

By international standards, Canada is a relatively small, but specialized producer of information technologies. Although Canada accounts for only about 1% of world exports of information technology products, it has earned a reputation as a world leader in telecommunications and a significant producer of software and computer services.

Over the past five years, as a result of rapid growth, the information technology sector has become a more significant part of the Canadian economy. By 1995, this sector's share of Canada's gross domestic product had risen to 7.6%, from 5.5% in 1990. It supported a workforce of 308,000, almost 3% of total employment in Canada.

Between 1990 and 1995, operating revenues in the electronic equipment and computer services industry rose 61%, hitting a record $47.6 million. Over the same period, revenues for telecommunications carriers increased 34.2% to $16.5 million.

Note to readers

This article is based on the second of a new series of publications called Industry profile, *which provides a composite picture of Canada's key economic sectors. The data included in this profile are those available as of May 1996.*

Information technology, which covers a broad spectrum, includes three essential elements: hardware, software and infrastructure. For this profile, hardware is defined as hardware manufacturing industries, software includes software and service companies, and infrastructure consists of telecommunications carriers.

Canadian hardware manufacturers are highly export-oriented; in recent years, foreign shipments have represented approximately 73% of total shipments. At the same time, imports of information technology products are substantially greater than domestic production: in 1995, Canada incurred a trade deficit of $18.6 billion in these products.

(continued on page 5)

... Information technology sector undergoes rapid growth

Research and development (R&D) expenditures in the information technology sector are greater than in any other industry. In recent years, the information technology sector has spent more than $2.5 billion annually and employed almost 25,000 highly skilled professionals and technicians on R&D. In 1995, its expenditures represented almost 60% of R&D expenditures in the manufacturing sector and 37% of R&D in all industry.

Canada's information technology sector recorded total gross output of almost $64 billion in 1995, a 65.4% increase from 1990. Growth was concentrated most heavily in software and services, whose revenues expanded by 114%, compared with and 84% increase for hardware manufacturers.

In contrast to the growth in output, employment in the information technology sector has weakened. It peaked at about 316,500 in 1990, but due to the recession and corporate downsizing, fell to a low of 295,000 in 1994. Employment recovered somewhat in 1995, rising 4.7% to 308,000.

The telephone industry remained the largest employer, with about 84,000 employees in 1995, or 27% of the workforce. It has, however, been downsizing. On the other hand, the dynamic software industry recorded job gains of 21% (19,000) between 1990 and 1995, while the equally dynamic communications equipment and electronic component industry showed a 14% (7,000) increase. Telecommunications carriers lost 25,000 jobs over the five-year period, falling 21.3%.

Average weekly earnings in information technology have tended to be well above those in the manufacturing sector as a whole.

***Industry profile: Canada's information technology sector** (15-516-MPE, $18) is now available. To order, contact the Statistics Canada Regional Reference Centre nearest you, or order via the Internet: order@statcanca. For further information, contact Roger Purdue (613-951-3425; Internet: purdrge@statcan.ca) or Fred Wong (613-951-2994; Internet: frewong@statcan.ca), Business and Trade Statistics Field.*

Housing prices fall slower than before

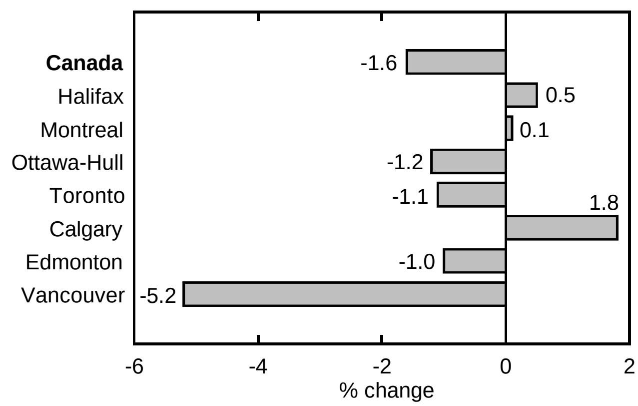
The rate of decline in housing prices reported over the last two years continued to slow in October, as the housing price index decreased 1.6% from 12 month before. This compares with a year-over-year drop of 2.0% in September.

October's decline is attributed mainly to decreases on the West Coast: Vancouver house prices dropped 5.2%, while those in Victoria fell 4.7%.

Between September and October, the index declined 0.1%. In 7 of the 21 cities surveyed, contractors reported either no change in new home selling prices or offsetting changes resulting in no monthly movement in their total city indexes. Of the six cities showing monthly price increases, the largest were recorded for Charlottetown (+0.9%) and Ottawa-Hull (+0.6%). Of the eight cities registering monthly decreases, the largest were for Kitchener-Waterloo (-0.7%) and Vancouver (-0.6%).

Builders reported that some price increases were attributed to increased construction costs, lumber in particular, but these were more than offset by declines that builders felt were due to competitive market conditions in many of the surveyed cities.

New housing price indexes
October 1995 to October 1996



Available on CANSIM: matrix 2032.

*The fourth quarter 1996 issue of **Construction price statistics** (62-007-XPB, $23/$76) will be available in March. For further information, contact Paul-Roméo Danis (613-951-3350; fax: 613-951-2848; Internet: danipau@statcan.ca), Prices Division.*

Number of help-wanted ads increases again

In November, the help-wanted index, which measures the number of help-wanted advertisements in newspapers, rose for a second consecutive month, this time by 2% to 90 (1991=100). Nine of the provinces recorded increases, led by Ontario and Alberta. The index remained relatively flat between February and October 1996, reflecting the weak employment growth since January.

Note to readers

The help-wanted index is compiled from the number of help-wanted ads published in 22 newspapers in 20 major metropolitan areas. The index is a measure of companies' intentions to hire new workers. These indexes have been seasonally adjusted and smoothed to ease month-to-month comparisons.

(continued on page 6)

... Number of help-wanted ads increases again

In Ontario, the index grew 2% to 95, returning to its January level. Quebec increased 1% to 86, remaining relatively flat over the last three months. British Columbia recorded its third straight increase, to stand at 68. This was the first time since May 1989 that this province has recorded three consecutive months of growth.

The Prairies index jumped 3% to 97, bringing the growth since January to 13%. The number of help-wanted advertisements rose in Alberta and Manitoba, while Saskatchewan recorded its first decline in seven months.

The Atlantic provinces index gained 3% to reach 101, its first increase since May. All provinces contributed to the gain.

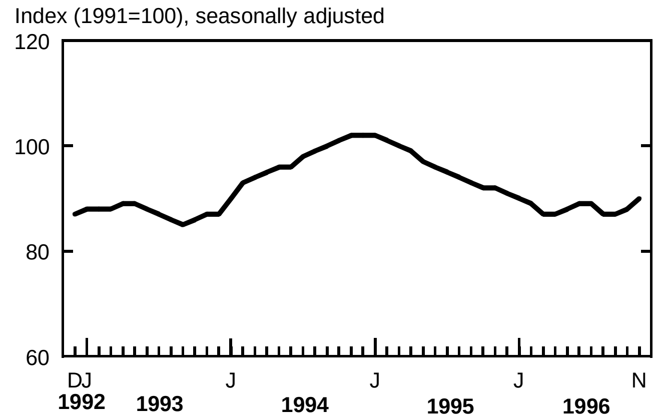
Available on CANSIM: matrix 105 (levels 8-10).

For further information, contact Michael Scrim (613-951-4090), Labour Division (fax: 613-951-4087; Internet: labour@statcan.ca).

Help-wanted index, November 1996
(1991=100)
Seasonally adjusted

	Level	% change, previous year	% change, previous month
Canada	**90**	**-1**	**2**
Atlantic provinces	101	-2	3
Newfoundland	78	-4	1
Prince Edward Island	152	-3	8
Nova Scotia	103	8	1
New Brunswick	102	-13	2
Quebec	86	-9	1
Ontario	95	-1	2
Prairie provinces	97	10	3
Manitoba	107	2	1
Saskatchewan	104	13	-1
Alberta	90	14	2
British Columbia	68	-3	1

Help-wanted index



New from Statistics Canada

StatCan: CANSIM time series directory

December 1996

The *CANSIM time series directory* serves as a guide to the data contained in the *CANSIM time series database*. On-line access to this database is available world-wide through a number of distributors.

The *StatCan: CANSIM directory disc* makes finding data easy. You can search by keyword or by topic. The disc also contains the Statistical Data Documentation System (SDDS), a database of information about the surveys and statistical programs used at Statistics Canada. There is a thesaurus of terms used by Statistics Canada and an instructional module called "About Statistics Canada data", which contains additional information on the data and services available from Statistics Canada.

The December 1996 edition of the ***CANSIM time series directory*** *is now available on compact disc. An annual subscription, which includes four quarterly issues, is priced at $100 in Canada, US$120 in the United States and US$140 in other countries. For further information, contact your nearest Statistics Canada Regional Reference Centre.*

RRSP contribution limit (room)

1996

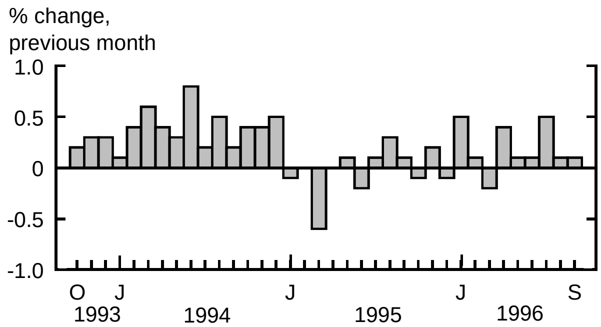
The 1996 edition of the RRSP contribution limits (room) databank is now available. Today's release of financial data will be of particular interest to researchers, policy planners, financial institutions and marketers.

Small area data on RRSP room are produced annually for many levels of postal geography, including cities, towns and areas as small as letter-carrier routes.

For further information, contact Client Services (613-951-9720; fax 613-951-4745; Internet saadinfo@statcan.ca), Small Area and Administrative Data Division.

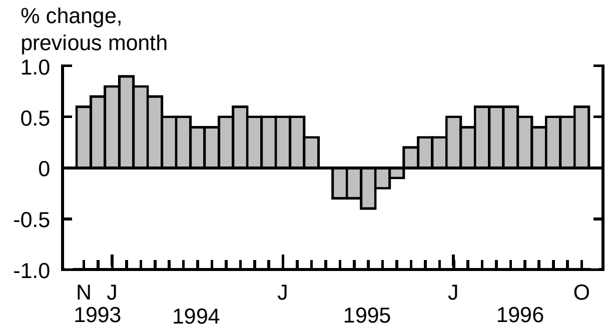
Current trends

Gross domestic product



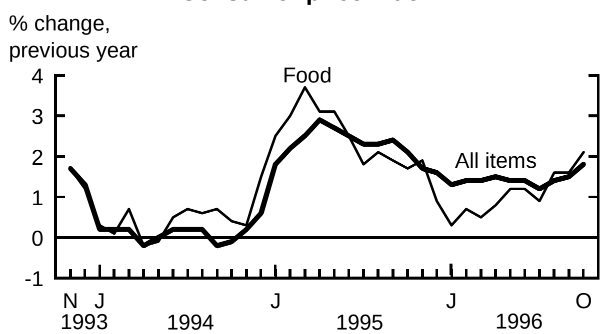
Real gross domestic product at factor cost increased 0.1% between August and September.

Composite index



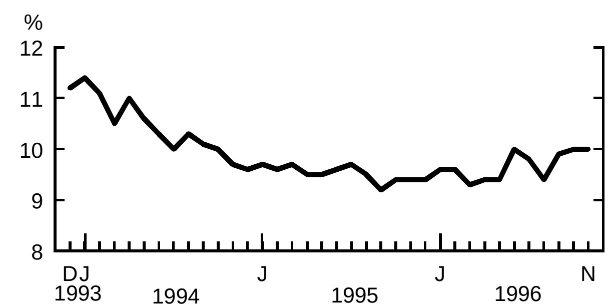
The composite index grew by 0.6% between September and October.

Consumer price index



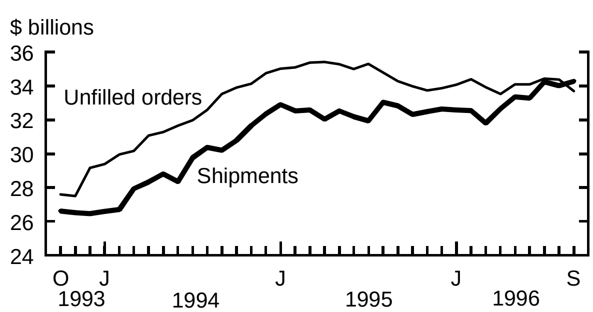
Consumers paid 1.8% more for goods and services in October 1996 than the year before. Food prices rose by 2.1%.

Unemployment rate



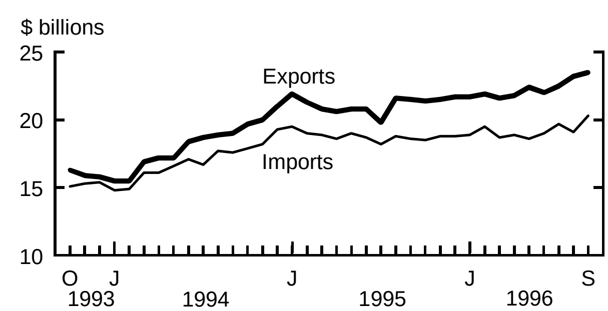
In November, the unemployment rate remained unchanged at 10.0%.

Manufacturing



Manufacturers' shipments bounced back 0.8% in September to $34.3 billion. The level of unfilled orders fell 1.2% to $33.7 billion.

Merchandise trade



In September, the value of merchandise exports rose 1.7% from August to $23.5 billion. Imports surged 4.6% to $20.3 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)	September	552.6	0.1%	1.8%
Composite index (1981=100)	October	181.7	0.6%	5.8%
Operating profits of enterprises ($ billion)	Q3 1996	24.4	7.5%	3.8%
Capacity utilization (%)	Q3 1996*	83.8	1.3†	0.8†
DOMESTIC DEMAND				
Retail trade ($ billion)	September	17.9	0.2%	0.8%
New motor vehicle sales ('000 units)	September	98.8	1.1%	-5.3%
LABOUR				
Employment (millions)	November*	13.7	0.1%	1.5%
Unemployment rate (%)	November*	10.0	0.0†	0.6†
Participation rate (%)	November*	65.0	0.0†	0.5†
Labour income ($ billion)	September	35.9	0.3%	2.1%
Average weekly earnings ($)	September	585.90	-0.5%	1.8%
INTERNATIONAL TRADE				
Merchandise exports ($ billion)	September	23.5	1.7%	9.4%
Merchandise imports ($ billion)	September	20.3	4.6%	9.3%
Merchandise trade balance (all figures in $ billion)	September	3.2	-0.5	0.3
MANUFACTURING				
Shipments ($ billion)	September	34.3	0.8%	4.4%
New orders ($ billion)	September	33.9	0.1%	4.8%
Unfilled orders ($ billion)	September	33.7	-1.2%	-1.7%
Inventory/shipments ratio	September	1.31	0.00	-0.06
PRICES				
Consumer price index (1986=100)	October	136.2	0.2%	1.8%
Industrial product price index (1986=100)	October	129.1	-0.5%	-0.3%
Raw materials price index (1986=100)	October	140.9	0.5%	12.9%
New housing price index (1986=100)	October*	131.4	-0.1%	-1.6%

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

Infomat
A weekly review

Published by the Communications Division, Statistics Canada, 10-N, R.H. Coats Bldg., Ottawa, Ontario, K1A 0T6.

Editor: Anna Kemeny (613) 951-1197
Head of Official Release: Jacques Lefebvre (613) 951-1088

Catalogue: 11-002E. Price: Canada: $4.00 per issue, $140.00 per year; United States: US$5.00 per issue, US$168.00 per year; Other countries: US$5.00 per issue, US$196.00. Canadian customers please add 7% GST.

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Publications released from December 6 to 12, 1996

Division/title of publication	Period	Catalogue number	Price: Issue/Subscription Canada (Cdn.$)	United States US$	Other countries US$
HOUSEHOLD SURVEYS					
Labour force information	Week ended Nov. 16, 1996	71-001-PPB	10/100	12/120	14/140
INDUSTRY					
Asphalt roofing	October 1996	45-001-XPB	6/60	8/72	9/84
Chemical and chemical products industries	1994	46-250-XPB	38	46	54
Production and shipments of steel pipe and tubing	October 1996	41-011-XPB	6/60	8/72	9/84
INTERNATIONAL TRADE					
Exports by commodity					
Microfiche version	September 1996	65-004-XMB	35/350	42/420	49/490
Paper version	September 1996	65-004-XPB	75/750	90/900	105/1,050
SERVICES, SCIENCE AND TECHNOLOGY					
Telephone Statistics	September 1996	56-002-XPB	9/90	11/108	13/126
TRANSPORTATION					
Trucking in Canada	1994	53-222-XPB	50	60	70

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