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MAJOR RELEASES

Business Conditions Survey: Manufacturing industries
October 2001

Manufacturers were increasingly concerned about the pace of their production and the prospects for employment in the fourth quarter, according to the October Quarterly Business Conditions Survey.

The voluntary survey, to which almost 4,000 responded, showed that more than one-third of manufacturers expected to reduce output during the next three months, and almost one-quarter expected that their work force would decline.

However some respondents said they were finding it extremely difficult to assess their economic prospects for the fourth quarter. Many specifically mentioned the uncertainty caused by the September 11 terrorist attacks on New York and Washington, as well as the current economic slowdown.

The survey questionnaire was mailed in late September, and responses were collected during the first two weeks of October.

Only 8% of manufacturers remained positive about the prospects of increasing production for the coming quarter, the lowest level of positive responses since the survey began in 1981. This proportion is less than half the 17% recorded in July and 19% in October 2000.

Similarly, only 9% of manufacturers said they planned to increase employment levels in the next three months, slightly less than 11% in July and almost one-half of the level of 17% in October 2000.

However, four of five manufacturers considered their level of finished product inventory on hand was just about right. Only about 20% said their inventory was too high, down from 28% in July.

One-third of manufacturers expect to cut production further

About 34% of manufacturers told the survey that they expected to reduce output during the next three months, more than double the proportion of 16% in October 2000.

Producers in the transportation equipment and primary metals industries were the major contributors to these lowered expectations. At the same time, about 58% of manufacturers reported their output would be about the same, compared with about 55% in July and 65% a year ago.

Note to readers

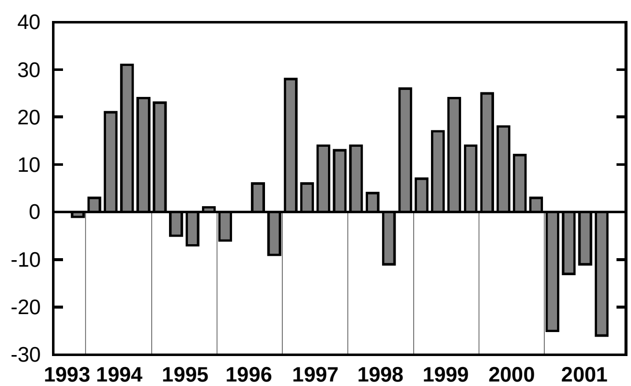
The Business Conditions Survey is conducted in January, April, July and October; most of the responses are recorded in the first two weeks of these months. Results are based on replies from about 4,000 manufacturers, and are weighted by a manufacturer's shipments or employment. Consequently, larger manufacturers have a correspondingly larger impact on the results than smaller manufacturers.

Data in this release are seasonally adjusted, except for the data on production difficulties.

The balance of opinion for production prospects declined sharply to -26 in October, compared with -11 in July and +3 in October 2000.

The balance of opinion is determined by subtracting the proportion of manufacturers that stated their volume of production would likely be lower from the proportion who said their output would likely be higher.

Balance of opinion for expected volume of production next quarter versus last quarter



Employment prospects in manufacturing remain uncertain

Employment prospects in manufacturing remained uncertain for the fourth quarter, according to the survey. About 24% of manufacturers said their work force would drop in the next three months, a substantial increase from 17% in July and double the proportion of 12% in October 2000.

Indications of decreasing employment levels were widespread across the major industry groupings.

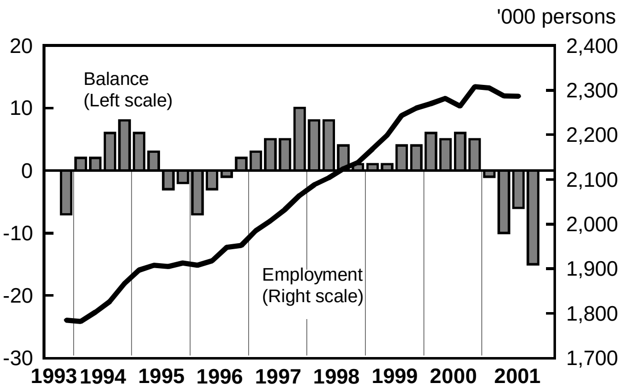
The indications were strongest in four industries: transportation equipment, wood products, fabricated metal products and textiles.

The September Labour Force Survey reported employment in manufacturing fell more than 43,000 in the first nine months of 2001, down from a peak of just over 2.3 million in December 2000.

About two-thirds (67%) of manufacturers said their employment levels would remain constant.

The October balance of opinion for employment prospects for the next three months fell 9 points to -15.

Balance of opinion on employment prospects during the next quarter and manufacturing employment (Labour Force Survey)



Reduced backlog of unfilled orders a concern

Almost one-half (48%) of manufacturers said their backlog of unfilled orders was lower than normal, compared with 40% in July and 21% in October 2000.

As well, only 4% reported that the level was higher than normal, compared with 6% in July and 8% in October 2000. The -44 balance of opinion on unfilled orders was the lowest since the first quarter of 1992 (-51) and 10 points lower than in July 2001.

The greatest level of concern regarding the backlog of unfilled orders came from producers in four industries: transportation equipment, primary metals, paper and electrical and electronic products.

According to the Monthly Survey of Manufacturing, unfilled orders in August eased back 0.5% to $49.3 billion. Unfilled orders have generally been edging down since peaking in November 2000 at $50.9 billion.

Greater worry about orders received

About 46% of manufacturers reported concern about declining orders received in October, compared with 41% in July and more than twice the level of 18% in October 2000.

This was largest proportion showing dissatisfaction with new orders since 48% so reported in March 1991.

Manufacturers in the primary metals, transportation equipment, and paper industries expressed the greatest level of concern about orders received.

The balance of opinion on the current level of orders received dropped to -41, 7 points lower than in the July survey.

Manufacturers less concerned with finished product inventory

About 80% of manufacturers said they were satisfied with their current level of finished product inventory.

According to the Monthly Survey of Manufacturing, finished product inventories were slightly over $20 billion in August, down from a high of more than $20.2 billion in June. The finished products inventory-to-shipments ratio has levelled off after rising strongly during the winter of 2001.

In the October survey, the balance of opinion concerning the current level of finished product inventory improved 7 points to -19.

Few manufacturers report production impediments

About 80% of manufacturers reported little in the way of production impediments in October, unchanged from the July survey. A shortage of skilled labour continued to be a concern for 7% of manufacturers and 2% reported a shortage of unskilled labour.

Available on CANSIM: tables 3020001-3020003.

To order data, or for general information, contact the dissemination officer (1-866-873-8789; 613-951-9497; *manufact@statcan.ca*). For more information, or to enquire about the concepts, methods or data quality of this release, please contact Claude Robillard (613-951-3507; *robilcg@statcan.ca*), Manufacturing, Construction and Energy Division. □

Business Conditions Survey: Manufacturing industries

	October 2000	January 2001	April 2001	July 2001	October 2001
	Seasonally adjusted				
Volume of production during next three months compared with last three months will be:					
About the same	65	43	59	55	58
Higher	19	16	14	17	8
Lower	16	41	27	28	34
Balance	3	-25	-13	-11	-26
Orders received are:					
About the same	70	42	54	52	49
Rising	12	13	12	7	5
Declining	18	45	34	41	46
Balance	-6	-32	-22	-34	-41
Present backlog of unfilled orders is:					
About normal	71	55	55	54	48
Higher than normal	8	10	6	6	4
Lower than normal	21	35	39	40	48
Balance	-13	-25	-33	-34	-44
Finished product inventory on hand is:					
About right	80	66	74	70	79
Too low	3	3	5	2	1
Too high[1]	17	31	21	28	20
Balance	-14	-28	-16	-26	-19
Employment during the next three months will:					
Change little	71	65	72	72	67
Increase	17	17	9	11	9
Decrease	12	18	19	17	24
Balance	5	-1	-10	-6	-15
	unadjusted				
Sources of production difficulties:					
Working capital shortage	2	2	3	2	3
Skilled labour shortage	8	8	8	7	7
Unskilled labour shortage	2	2	2	3	2
Raw material shortage	3	4	2	2	2
Other difficulties	5	6	5	6	6
No difficulties	80	79	82	80	80

[1] *No evident seasonality.*

■

Workplace and Employee Survey: Job vacancies
1999

Virtually one-half of all the long-term job vacancies in profit-oriented firms during 1999 were in the retail trade and consumer services industries, according to a new report based on data from the 1999 Workplace and Employee Survey (WES).

These sectors, which pay relatively low wages and have high rates of labour turnover, accounted for 50% of the job vacancies that went unfilled for at least four months prior to the time the survey was taken.

This suggests that even in periods of strong growth in the high-technology sector a substantial share of job vacancies is found outside high-tech industries. Both employment and gross domestic product recorded strong growth during 1999, while the unemployment rate was relatively low.

Firms in retail trade and consumer services accounted for 30% of jobs in the private sector in 1999. They paid their full-time workers an average of $13.18 per hour, compared with an average of $19.14 for all firms, and they also had a relatively high rate of labour turnover.

Of the 735,900 establishments in Canada, about 13%, or 95,400, reported a total of 286,415 job vacancies in 1999. This put the job vacancy rate at 2.6%. About 1.2% of positions were still vacant after four months or more, which is an indicator of vacant jobs that employers find hard to fill. These figures may overestimate the number of jobs available to unemployed workers because they include some positions available only to people inside the firm. Companies may fill these positions, through promotions or lateral moves, with existing workers, and might not replace them through external recruitment.

The report found two types of establishments with high vacancy rates. The first consisted of firms that employed a highly skilled work force and that innovated and adopted new technologies that require greater skills. The second type consisted of firms that were not unionized, were part of a single-establishment company, and operated in retail trade and consumer services industries.

Despite the growing interest regarding labour shortages that emerged during the economic expansion of the late 1990s, there was no Canadian survey measuring the number of job vacancies in Canada, until recently.

The WES, which covers topics such as technology adoption, innovation, human resource practices and business strategies, also contains information on job vacancies. It is the first nation-wide Statistics Canada survey to measure job vacancy rates since the Job Vacancy Survey during the 1970s. That survey estimated job vacancy rates between 1971 and 1978 at 0.4% to 1.6%.

While the WES measured both vacant positions available to people inside the firm and those available to workers outside the firm, the Job Vacancy Survey measured only vacant positions available to people outside the firm. As a result, the two surveys are not comparable.

Note to readers

This release is based on analysis in a new report titled Quest for workers: A new portrait of job vacancies in Canada, *and an accompanying research paper,* Which firms have high job vacancy rates in Canada?*, both available today.*

Quest for workers *is the second report in the Evolving Workplace Series, a co-operative venture of Human Resources Development Canada and Statistics Canada to promote research on the workplace using data from the 1999 Workplace and Employee Survey (WES).*

This survey collects a broad range of information on a sample of employers and their employees. It aims to shed light on the relationships between competitiveness, innovation, technology use and human resource management on the employer side, and technology use, training, job stability and earnings on the employee side. Future reports in this series will cover such topics as training determinants, gender-based wage differences and the computer technology–education connection.

The WES covers all industries except farming, fishing, hunting, trapping and public administration. Unless otherwise stated, all numbers presented in this release refer to these industries. In these industries, the vast majority of establishments operate for profit.

In this release, the term private sector refers to the establishments that operate for profit in the aforementioned industries. The job vacancy rate equals the number of unfilled positions divided by the total number of positions, both filled and vacant.

Vacancy rates vary markedly by industry and region

A high unemployment rate usually coincides with a low job vacancy rate and, conversely, a high job vacancy rate coincides with a low unemployment rate. As the demand for labour rises, the number of unemployed workers tends to decline, and the number of job vacancies tends to increase.

In 1999, the extent of labour shortages varied substantially by industry. In forestry, mining and oil and gas extraction, where hourly wage rates for full-time workers averaged $26.42, job vacancy rates were 0.9%. In contrast, job vacancy rates were 3.9% in retail trade and consumer service industries.

Ontario, Manitoba and Alberta, three provinces with relatively low unemployment rates in 1999, displayed fairly high job vacancy rates. In Ontario, the job vacancy rate was 3.2%; in Manitoba and Alberta, it was 3.4%.

This was in sharp contrast with the Atlantic provinces, where the job vacancy rate was just 1.6%, likely reflecting the relatively high unemployment rates prevailing in these provinces.

Job vacancy rates and hourly wages, by industry
1999

	Job vacancy rate[1]	Average hourly wage of full-time employees
	%	$
All industries[2]	**2.6**	**19.14**
Forestry, mining oil and gas extraction	0.9	26.42
Labour-intensive tertiary manufacturing	2.5	15.18
Primary product manufacturing	1.2	20.68
Secondary product manufacturing	2.2	18.53
Capital-intensive tertiary manufacturing	2.3	21.92
Construction	2.3	21.22
Transportation, warehousing, wholesale trade	2.4	20.25
Communication and other utilities	2.0	24.28
Retail trade and consumer services	3.9	13.18
Finance and insurance	2.1	19.97
Real estate, rental and leasing operations	--	20.06
Business services	2.5	20.80
Education and health services	1.9	20.77
Information and cultural industries	2.1	23.91

1 *The job vacancy rate equals the number of job vacancies divided by the total number of positions, both filled and vacant.*
2 *Except agriculture, fishing, hunting, trapping and public administration.*
-- *Estimates not shown due to high sampling variability.*

High vacancy rates in establishments with strong skill requirements

Establishments with indicators of strong skill requirements tended to have relatively high job vacancy rates in 1999. For instance, establishments that implemented an innovation in the period from April 1, 1998 to March 31, 1999 had job vacancy rates of 3.0%, compared with 1.8% for other establishments.

Furthermore, profit-oriented establishments that had a greater-than-average proportion of skilled employees (managers, professionals and technical or trades workers), and that innovated and also introduced a skill-increasing technology reported an even higher vacancy rate, 3.9%.

High vacancy rates in small and non-unionized establishments

Job vacancy rates appeared to be lower among large employers. Establishments with fewer than 100 employees had job vacancy rates of roughly 3.0%, but those with more than 500 employees reported only 1.9% of their positions vacant. Similarly, workplaces belonging to a multi-establishment company reported a vacancy rate of 1.9%, much lower than the 3.1% reported by others.

In unionized establishments, only 1.8% of jobs were vacant, compared with 3.0% in non-unionized establishments.

These differences may reflect a number of factors. First, large establishments and those belonging to a multi-establishment firm have an internal labour market that allows workers to change jobs without changing employers. Second, these establishments, along with unionized establishments, tend to pay relatively high wages.

Both factors are likely to reduce workers' rates of quitting, thus decreasing the number of vacancies created as a result of employees' departure. They may also increase the pool of applicants for a given job opening, leading to lower vacancy durations and, thus, lower vacancy rates.

The joint effect of employer size, union status and industry is substantial. Non-unionized workplaces in retail trade and consumer services industries that do not belong to a multi-establishment firm had job vacancy rates of 5.3%. These workplaces accounted for fully one-third of all job vacancies in the private sector.

Lack of experience, too few applicants cited as problems in filling vacancies

After four months or more, 1.2% of positions were still vacant. The explanations employers cited most often for long-term vacancies were the applicants' lack of experience and that there were too few applicants. However, these two reasons varied depending on the occupational group.

Among managerial, sales, marketing and production positions, for instance, the reason most often cited was applicants' lack of experience; for professionals, technical personnel and the clerical and administrative group, too few applicants was the reason most often cited.

Another reason was lack of education, which was reported frequently (46% of respondents) for having long-term vacancies in technical positions.

These findings must be interpreted with caution, because any of these reasons cited may conceal poor compensation offered for some vacant positions. Furthermore, the reasons for being unable to fill vacancies may vary depending upon current economic growth and the associated labour demand.

The quest for workers: A new portrait of job vacancies in Canada is now available electronically (71-584-MIE01002, free) from both Statistics Canada's Web site (*www.statcan.ca*) and Human Resources Development Canada's Applied Research Branch Web site (*www.hrdc-drhc.gc.ca/arb*). A paper version (71-584-MPE, no. 2, $15) is also available. See *How to order products*.

The research paper *Which firms have high job vacancy rates in Canada?* (11F0019MIE01176, free) is now available on Statistics Canada's Web site (*www.statcan.ca*). From the *Our products and services* page, choose *Research papers (free),* then *Social conditions*. A paper version (11F0019MPE, no. 176, $5/$25), can be ordered from Hélène Lamadeleine (613-951-5231).

For more information, or to enquire about the concepts, methods or data quality of this release, contact René Morissette (613-951-3608), Business and Labour Market Analysis Division, or Diane Galarneau (613-951-4626), Labour Statistics Division. To enquire about related statistics or services, contact the Client Services Unit (1-866-873-8788; 613-951-4090; fax: 613-951-2869; *labour@statcan.ca*), Labour Statistics Division. ■

OTHER RELEASES

Help-wanted Index

October 2001

In October, the Help-wanted Index (1996=100) fell 5.4% from September to 140, the sixth consecutive month of decline. Eight of 10 provinces recorded monthly decreases—Ontario (-7.0%), Alberta (-6.8%) and British Columbia (-6.7%) showed the largest declines. Compared with October 2000, the national index was down 20.9%.

Help-wanted Index

(1996=100)

	Oct. 2000	Sept. 2001	Oct. 2001	Oct. 2000 to Oct. 2001	Sept. to Oct. 2001
	Seasonally adjusted and smoothed			% change	
Canada	**177**	**148**	**140**	**-20.9**	**-5.4**
Newfoundland	202	195	196	-3.0	0.5
Prince Edward Island	243	232	224	-7.8	-3.4
Nova Scotia	164	157	150	-8.5	-4.5
New Brunswick	188	163	158	-16.0	-3.1
Quebec	168	138	134	-20.2	-2.9
Ontario	193	157	146	-24.4	-7.0
Manitoba	174	167	165	-5.2	-1.2
Saskatchewan	139	145	145	4.3	0.0
Alberta	175	176	164	-6.3	-6.8
British Columbia	146	120	112	-23.3	-6.7

Note: The Help-wanted Index is compiled from the number of help-wanted ads published in 22 newspapers in 20 major metropolitan areas and is considered an indicator of labour demand measuring companies' intentions to hire new workers. These indices have been seasonally adjusted and smoothed to ease month-to-month comparisons.

Available on CANSIM: table 2770002.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Gilles Groleau or Jean Leduc (1-866-873-8788; 613-951-4090; fax: 613-951-2869; *labour@statcan.ca*), Labour Statistics Division. ■

Crude oil and natural gas

August 2001 (preliminary)

Crude oil production totalled 10 888 500 cubic metres in August, up 2.0% from August 2000. Exports, which accounted for 58.4 % of total production, fell 5.5%.

Marketable natural gas production rose 3.9% from August 2000. The increase was mostly attributable to higher marketable production in British Columbia. Domestic sales fell 9.4%; all three sectors (residential, commercial and industrial) recorded lower sales. Natural gas exports, which accounted for 66.2% of total marketable production, gained 13.9%.

Crude oil and natural gas

	Aug. 2000	Aug. 2001	Aug. 2000 to Aug. 2001
	Thousands of cubic metres		% change
Crude oil and equivalent hydrocarbons[1]			
Production	10 672.3	10 888.5	2.0
Exports	6 723.4	6 353.9	-5.5
Imports[2]	4 855.3	4 378.5	-9.8
Refinery receipts	8 796.7	8 841.7	0.5
	Millions of cubic metres		% change
Natural gas[3]			
Marketable production	13 768.1	14 299.7	3.9
Exports	8 316.7	9 470.2	13.9
Canadian domestic sales[4]	4 125.1	3 737.7	-9.4
	Jan. to Aug. 2000	Jan. to Aug. 2001	Jan.–Aug 2000 to Jan.–Aug 2001
	Thousands of cubic metres		% change
Crude oil and equivalent hydrocarbons[1]			
Production	84 885.9	85 915.0	1.2
Exports	53 721.7	53 389.6	-0.6
Imports[2]	35 837.7	37 087.3	3.5
Refinery receipts	67 026.2	69 804.9	4.1
	Millions of cubic metres		% change
Natural gas[3]			
Marketable production	110 028.8	114 290.6	3.9
Exports	65 714.7	73 293.8	11.5
Canadian domestic sales[4]	47 492.3	44 651.7	-6.0

1. *Disposition may differ from production because of inventory change, industry own-use, etc.*
2. *Crude oil received by Canadian refineries from foreign countries for processing. Data may differ from International Trade Division (ITD) estimates because of timing differences and the inclusion of crude oil landed in Canada for future re-export in the ITD data.*
3. *Disposition may differ from production because of inventory change, usage as pipeline fuel, pipeline losses, line-pack fluctuations, etc.*
4. *Includes direct sales.*

Year-to-date production of crude oil to the end of August grew 1.2% compared with the same period of 2000, but crude oil exports decreased 0.6 %.

Year-to-date marketable production of natural gas was up 3.9% compared with the same period in 2000. Natural gas exports were up 11.5%, and domestic sales fell 6.0%.

Available on CANSIM: tables 1260001 and 1310001.

The August 2001 issue of *Supply and disposition of crude oil and natural gas* (26-006-XPB, $19/$186) will be available in November. See *How to order products*.

To order data, or for general information, contact the dissemination officer (1-866-873-8789; 613-951-9497; *energ@statcan.ca*. For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Gerry Desjardins (613-951-4368; *desjger@statcan.ca*) or Eleonore Harding (613-951-5708; *hardele@statcan.ca*), Manufacturing, Construction and Energy Division. ■

Flows and stocks of fixed residential capital

2000

The annual fixed residential capital flows and stocks series at the provincial level for 2000 are now available.

Available on CANSIM: table 300002.

For more information, or to enquire about the concepts, methods or data quality of these new series, contact Étienne Saint-Pierre (613-951-2025; *saineti@statcan.ca*), Investment and Capital Stock Division. ■

NEW PRODUCTS

Which firms have high job vacancy rates in Canada?, no. 176
Catalogue number 11F0019MIE01176
(free).

Which firms have high job vacancy rates in Canada?, no. 176
Catalogue number 11F0019MPE ($5/$25).

Food consumption in Canada, Part II, 2000
Catalogue number 32-230-XIB ($26).

Food consumption in Canada, Part II, 2000
Catalogue number 32-230-XPB ($35).

Labour force information, week ending October 20, 2001
Catalogue number 71-001-PIB ($8/$78).
Available at 7 am November 2

Labour force information, week ending October 20, 2001
Catalogue number 71-001-PPB ($11/$103).
Available at 7 am November 2

The quest for workers: A new portrait of job vacancies in Canada (The evolving workplace series), no. 2
Catalogue number 71-584-MIE01002
(free).

The quest for workers: A new portrait of job vacancies in Canada (The evolving workplace series), no. 2
Catalogue number 71-584-MPE ($15).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

Catalogue numbers with an -XIB or an -XIE extension are Internet versions; those with -XMB or -XME are microfiche; -XPB or -XPE are paper versions; -XDB are electronic versions on diskette and -XCD are electronic versions on compact disc.

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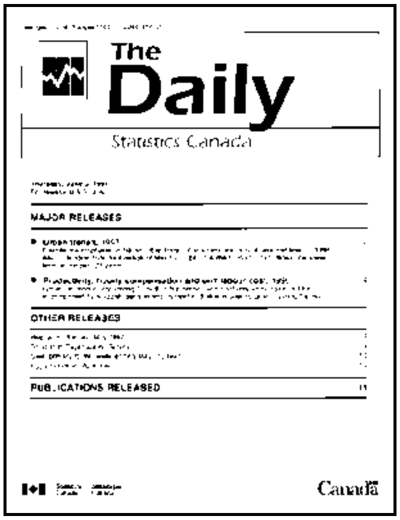

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MAJOR RELEASES

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