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Infomat

A Weekly Review

Friday, January 9, 2004

INSIDE

- ***SPOTLIGHT*: Household spending**

  Today's *Spotlight* is on household spending. New estimates from the 2002 Survey of Household Spending show that new technology and shifting priorities are changing the way Canadian households spend their money. On average, households spent $60,090 in 2002, up 2.2% from the previous year after adjusting for inflation.

- **Inflation remains steady as energy prices fall**

  Falling energy prices helped hold the line on inflation in November, as measured by the Consumer Price Index. The year-over-year increase in consumer prices held steady at 1.6%, the smallest gain since the 1.3% increase in June 2002.

- **Retail sales remain weak in several sectors**

  Consumer spending remained weak in several sectors in October as retail sales advanced a marginal 0.2% to $26.4 billion, after declining 1.0% in September.

Economy relies on consumer confidence for boost

The Canadian economy edged up in October, bolstered by confident Canadian consumers and a hot housing market.

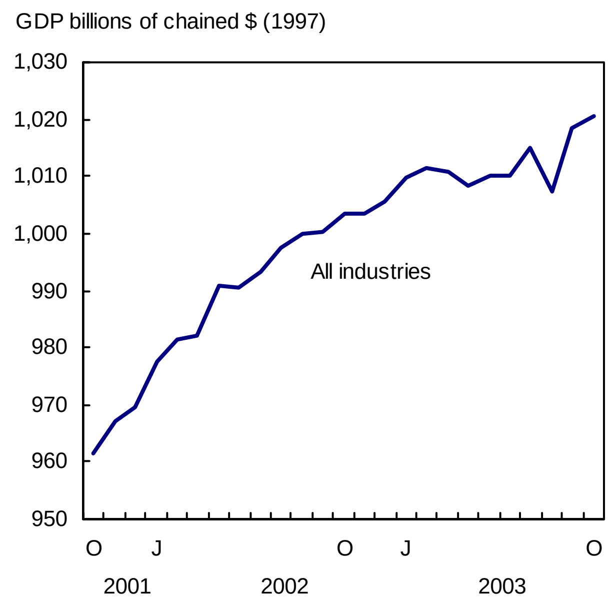
Gross domestic product by industry inched up 0.2%, following a surge of 1.1% in September and a decline of 0.7% in August.

Retailers and wholesalers alike benefited from increased customer traffic. New home builders and real estate agents and brokers profited from the continuing housing boom. Increased consumer spending on travel-related services boosted the industries in the travel and tourism sector.

Improved consumer confidence translated into higher retailing activity after a couple of weak months. Retailers registered a 0.6% gain in October, with strong sales at grocery stores.

(continued on page 2)

GDP up slightly



Economy relies on... *(continued from page 1)*

Strong consumer confidence and historically low mortgage rates continued to fuel the housing boom. New-home construction advanced a further 0.8% in October, and production is now up nearly 9% since January. The strength was attributable to a burst in multiple-unit construction in Ontario.

Manufacturers reported a slight gain of 0.1%. Increased production of primary and fabricated metal products, food and wood products was offset by a significant drop in the production of motor vehicles, computers and clothing.

Industrial production inched up 0.1%, following a surge in September. Higher mining output more than offset lower utilities.

An improved grain harvest resulted in a better year not only for farmers, but also for those industries involved in the storage and distribution of grains.

Wholesaling of computers was up strongly, reflecting recent increases in office machines and equipment imports. Automotive wholesalers benefited from higher motor vehicle parts production, as well as from significantly higher imports of motor vehicles, as retailers attempted to replenish low inventory levels.

Higher consumer spending had a positive impact on production in travel-related industries. The travel and tourism sector benefited from a stronger domestic economy as well as a 2.6% increase in the number of international tourists.

The hotel and accommodations industry surged 4.5%, as occupancy rates continued to improve from lows in April. However, output remained 3.8% below levels a year ago. Restaurant business increased for the fourth consecutive month.

The gambling industry grew 4.3% on strong sales of lottery tickets. Output in air transportation was 7.9% higher than lows in May, but still 13% below levels of August 2001.

For more information, contact Jo Ann MacMillan (613-951-7248), Industry Measures and Analysis Division.

Wholesale sales stay flat as only four sectors increase

Wholesalers sold $36.6 billion worth of goods and services in October, essentially unchanged from the previous month when sales had rebounded 6.4%.

On a year-to-date basis, wholesale sales have increased 3.1% during the first 10 months of 2003, compared with the same period in 2002.

Only four of the 11 wholesale trade sectors reported an increase in sales in October. The largest gain, 3.4%, was registered by the computer and electronic equipment sector, while the largest declines were in lumber and building materials and industrial machinery.

Inventory levels declined for the fifth time in seven months to their lowest level since February. This was largely due to substantial reductions in the industrial machinery and lumber and building materials sectors.

For more information, contact Jean Lebreux (613-951-4907), Distributive Trades Division.

Prices continue to weaken for manufacturers

Prices received by manufacturers for their products have declined for eight consecutive months on a year-over-year basis.

The latest decline occurred in November when industrial product prices fell 4.0% compared with the same month a year earlier. This was largely the result of the impact of a strong Canadian dollar against its American counterpart.

Without the influence of the exchange rate, the Industrial Product Price Index would have increased 1.0%.

Manufacturers paid 3.2% less for their raw materials than they did in November 2002, following a year-over-year decline of 7.5% in October.

Lower prices for vegetable products, animals and animal products and wood products were the major contributors to the drop in the Raw Materials Price Index.

For more information, contact Danielle Gouin (613-951-3375), Prices Division.

SPOTLIGHT: Household spending

Taxes still take biggest bite from household budget

Personal income taxes ate up less of the average family's budget in 2002, but remained the single largest expense, according to estimates from the 2002 Survey of Household Spending.

The proportion of the average household budget allocated to food and shelter remained largely unchanged from 2001. However, spending on transportation and communications increased, while the portion claimed by personal taxes fell for the second consecutive year.

Personal taxes accounted for an estimated 20% of the average household budget, down from 21% in 2001. Transportation claimed 14%, up slightly from 13%, while food represented 11% and shelter 19%, about the same as in 2001.

On average, households spent $60,090 in 2002, up 2.2% from 2001 after adjusting for inflation. This included an estimated $6,680 on food, $11,200 on shelter, $8,430 on transportation and $12,030 on personal taxes.

Two provinces reported average levels of household spending above the national average: Alberta at $67,730 and Ontario at $67,540. Newfoundland and Labrador continued to have the lowest average ($47,970).

Household spending on transportation rose to an estimated average of $8,430, up 11% from 2001. This was due largely to a 14% increase in spending on the purchase of cars and trucks, which includes vans and SUVs.

Average spending on gasoline, parts and other operating expenses rose 11% to $3,950. Spending on private and public automotive insurance premiums went up 16% to an average of $1,070. Eight out of 10 households reported owning or leasing at least one car or truck.

Average spending on public transportation, which includes airline fares as well as city and interurban transit, increased 7% to $690.

Household spending: Quick glance

Canadian households spent an average of $310 each on games of chance in 2002, an increase of nearly 18% from the previous year.

Spending on tobacco products rose 19% to an average of $730 in 2002. However, this largely reflected a 32% rise in the price of tobacco products. Between 1992 and 2002, the proportion of households reporting spending on tobacco fell from 47% to 37%.

Nearly one-half of Canadian households used natural gas as their primary heating fuel; 32% used electricity, and 13% depended on oil heating. This varied from province to province, depending on availability.

The primary heating fuel also varied with household tenure. Of the estimated 4.1 million households that rent, over 46% use electricity for heating, compared with only 24% among owners. More than 54% of the 7.6 million households that owned their dwelling reported natural gas as their primary heating fuel.

Households reported spending an average of $1,590 on health care, up 12%. This was due to an 11% increase in spending on prescription drugs, and a 13% increase in public and private health insurance premiums.

Households in Alberta reported the highest average spending on health care, at $1,990, followed by British Columbia at $1,850. Households in Newfoundland and Labrador reported the lowest average spending, while Ontario was second lowest.

The one-fifth of households with the lowest incomes spent over 51% of their budget on food, shelter and clothing in 2002. Personal income taxes claimed 4% of their budget. In contrast, the group of households with the highest incomes allocated 28% of their budget to food, shelter and clothing, while 28% also went to personal income taxes.

For more information, contact Client Services, (613-951-7355), Income Statistics Division.

Spending on high-tech: Majority of households had cell phones

For the first time, more than half of all Canadian households, about 52%, reported having a cell phone in 2002. The average household reported spending $260 on cellular services in 2002, up 25% from 2001.

DVD players and CD writers continued to soar in popularity. About 36% of households reported having a DVD player and 28% a CD writer. This compares with about 20% each in 2001.

Satellite television receivers were reported by 21% of households, up from 18% the previous year. Cable television use held steady at 67% of households.

Satellite TV was more widespread in rural areas. It was reported by over half of rural households, compared with only 16% of urban households. Average spending for satellite service rental jumped 31% to about $100 in 2002, while average cablevision service rental remained steady at $330.

Spending on new computer hardware was down 10% in 2002 to an average of $230. This was 17% below the peak of $280 reached in 2000. This decline was mainly due to a steady decrease in price. According to the Consumer Price Index, computer prices in 2002 were down 18% from 2001.

Inflation remains steady as energy prices fall

Falling energy prices helped hold the line on inflation in November, as measured by the Consumer Price Index. The year-over-year increase in consumer prices held steady at 1.6%, the smallest gain since the 1.3% increase in June 2002.

If energy had been excluded from the CPI, the 12-month change in November would have been 1.8%, a slight slowdown from the 1.9% registered in September and October.

The all-items index excluding the eight most volatile components, as defined by the Bank of Canada, rose 1.8% from November 2002 to November 2003, unchanged from October. This marks the fifth consecutive month of increases below the 2.0% mark.

On a month-over-month basis, the CPI advanced 0.2%, after declining 0.2% in October. Higher prices for automotive vehicles exerted the strongest upward pressure on the index.

Significant factors contributing to the 1.6% year-over-year increase included automotive vehicle insurance premiums, natural gas prices, tuition fees, homeowners' replacement cost and homeowners' insurance premiums.

Lower prices for gasoline, automotive vehicles, electricity and traveller accommodation exerted some downward pressure.

Energy prices fell 0.6% between November 2002 and November 2003. Lower prices for gasoline and electricity accounted for most of the decrease, helped by falling fuel oil prices. The downward pressure was partially offset by a 20.9% jump in natural gas prices.

Automotive vehicle insurance premiums increased on average 15.4%. This was the smallest 12-month increase since July 2002.

Tuition fees, represented by university fees, rose 8.1%, while premiums for homeowners' insurance were up 13.6%.

A large part of the 0.2% month-over-month increase was attributable to higher prices for automotive vehicles. Fresh vegetables, beef and natural gas prices also exerted upward pressure.

Downward pressure came from price decreases for gasoline, traveller accommodation, air transportation, electricity and women's clothing.

Consumer Price Index and major components (1992=100)

	November 2003	October 2003	November 2002	October to November 2003	November 2002 to November 2003
					% change
	Unadjusted				
All-items	**122.7**	**122.4**	**120.8**	**0.2**	**1.6**
Food	122.3	121.1	120.4	1	1.6
Shelter	118.3	118.2	115.7	0.1	2.2
Household operations and furnishings	114.9	115.1	114	-0.2	0.8
Clothing and footwear	104.2	105	105.2	-0.8	-1
Transportation	140.9	139.7	139.2	0.9	1.2
Health and personal care	118	117.7	116.2	0.3	1.5
Recreation, education and reading	127.5	128.3	126.7	-0.6	0.6
Alcoholic beverages and tobacco products	137.6	137	131.9	0.4	4.3
All-items (1986=100)	157.2				
Purchasing power of the consumer dollar expressed in cents, compared to 1992	81.5	81.7	82.8		

Excluding the impact of energy prices, the month-over-month index increased 0.4%.

Automotive vehicle prices rose 4.0% in November, as prices for the 2004 models were reflected in the index. Only pure price changes are incorporated in the index, as the CPI compares goods and services of equivalent quality. Therefore, price increases that are a consequence of an improvement in the quality of the product are factored out of the index.

This was the largest monthly increase since November 2000, when the automotive vehicle index rose 4.6%.

The price of fresh vegetables jumped 11.1% in November. Increases in fall are typical as availability of local produce begins to diminish. Cold, wet weather in California also put upward pressure on prices for broccoli, cauliflower, celery and lettuce.

Beef prices jumped 6.7% from October to November 2003, the strongest monthly advance since May 1982.

For more information, contact Ron Morency (613-951-3103), Prices Division.

Retail sales remain weak in several sectors

Consumer spending remained weak in several sectors in October as retail sales advanced a marginal 0.2% to $26.4 billion, after declining 1.0% in September.

Lower gasoline prices at the pump depressed overall retail sales growth. Retailers of big ticket items, such as auto dealers and household furniture and appliance stores, as well as general merchandisers, clothing stores and drug stores posted essentially flat sales.

Food retailers were the exception, with a sizable 1.9% sales increase in October. This helped offset a 1.1% decline in September.

Although retail sales have generally been increasing since the fall of 2001, year-over-year growth has decelerated so far in 2003.

Cumulative retail sales for the first 10 months this year were up 3.5%, a much weaker performance than the 6.4% growth in the same period of 2002.

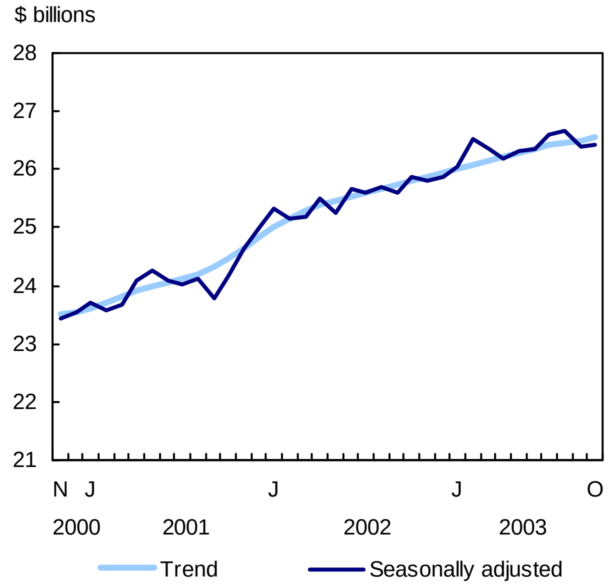
The sales growth so far this year has been the weakest since 1996, when cumulative retail sales for the first 10 months rose only 2.7%.

Food stores have faced several challenges in 2003, such as the August electrical blackout in Ontario, the mad cow scare and the SARS outbreak. Despite these challenges, cumulative sales in food stores for the first 10 months of 2003 were 5.5% above those in the same period in 2002.

Sales by household furniture and appliance stores, which account for 80% of all sales in the furniture sector, remained essentially flat in October.

For the first 10 months of 2003, sales in furniture stores were up 5.7% from the same period of 2002. This compares with annual sales gains of at least 8.0% from 1997 to 2002.

Retail sales up marginally in October



Sales in the automotive sector declined 0.8% in October, after falling 2.2% in September. Consumer spending edged down in the clothing sector.

Unisex clothing stores experienced a cumulative sales gain of 4.6% in the first 10 months of 2003. They attract slightly more than 50 cents of every dollar spent in the clothing sector.

In contrast, year-to-date sales have fallen for men’s clothing stores, shoe stores and women’s clothing stores.

Retail sales declined in only four provinces: Newfoundland and Labrador, Ontario, Manitoba and Saskatchewan.

For more information, contact Paul Gratton (613-951-3541), Distributive Trades Division.

“Rurality” an independent constraint on Internet use

Living in rural parts of Canada itself appears to be an independent constraint on household Internet use.

A new study, which uses data from the Household Internet Use Survey, shows that use is lower among households outside the 15 most populous census metropolitan areas, even after three main factors are taken into account: age, education and income.

Previous research has shown that members of rural households were less likely to use the Internet within each age group, each level of educational attainment and each income group.

This study, the first to hold these three factors constant, found that the concept of “rurality” itself was an independent constraint on Internet use. In other words, young age, high income and high education did not overcome the negative influence of living outside these 15 urban centres.

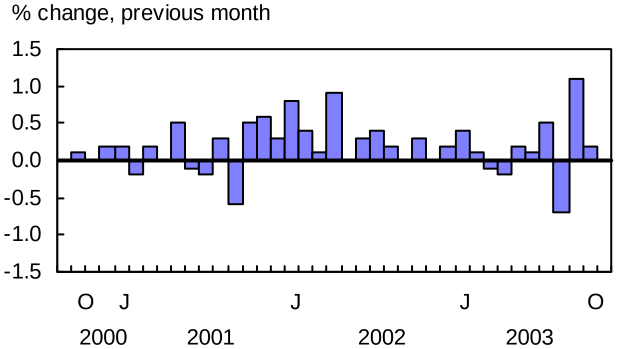
Internet use has been perceived as a crucial medium for residents in rural and remote Canada, since they may face isolation because of their geographic location.

You can read *Factors associated with household Internet use* on Statistics Canada’s website (www.statcan.ca).

For more information, contact Vik Singh (613-951-5666), Centre for Education Statistics.

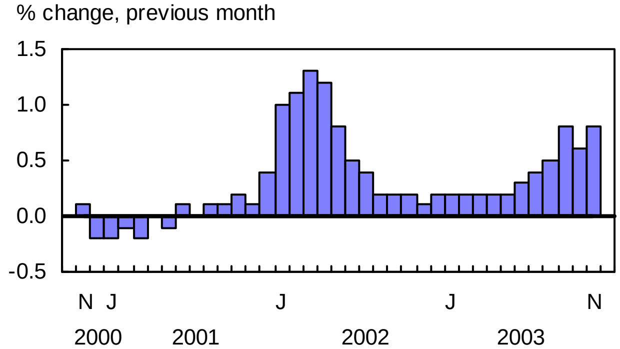
Current trends

Gross domestic product



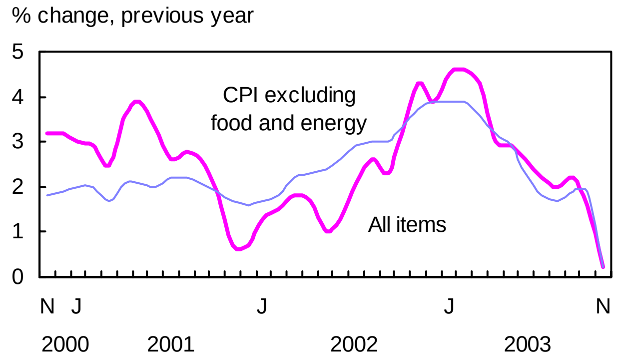
Total economic activity increased 0.2% in October, after a 1.1% increase in September.

Composite Index



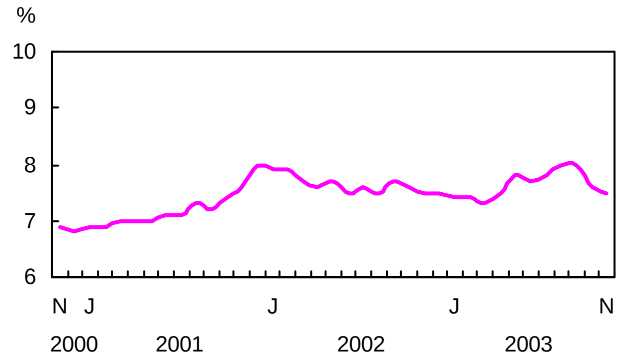
The leading indicator grew 0.8% in November after rising 0.7% in October.

Consumer Price Index



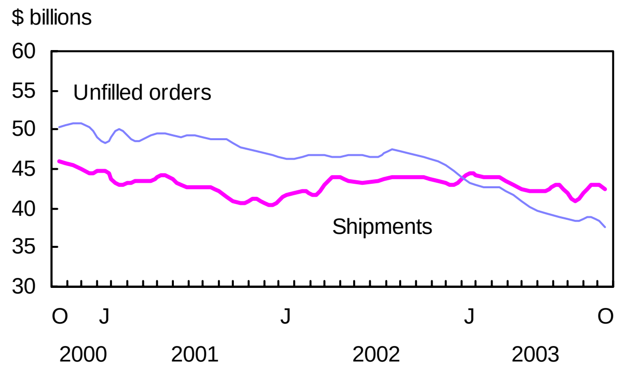
Consumer prices for goods and services were 0.2% higher in November than they were a year earlier. Excluding food and energy, prices rose 0.2%.

Unemployment rate



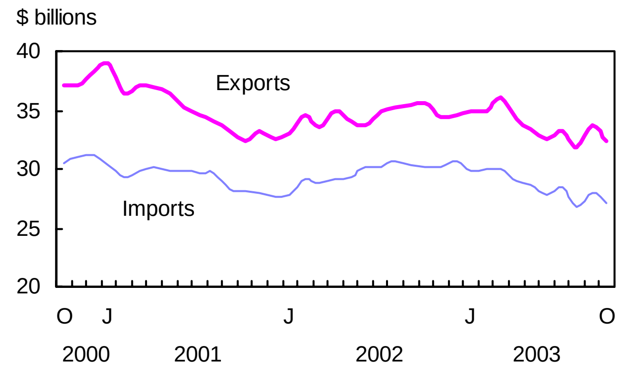
In November, the unemployment rate fell to 7.5%.

Manufacturing



Manufacturers' shipments fell 1.1% in October to $42.5 billion. The backlog of unfilled orders decreased 2.0% to $37.7 billion.

Merchandise trade



In October, exports fell 4.2% to $32.3 billion. Imports dropped 1.7% to $27.2 billion.

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

Latest statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product ($ billions, 1997)[1]	October*	1,020.7	0.2%	1.8%
Composite Index (1992=100)	November	186.9	0.8%	4.2%
Operating profits of enterprises ($ billions)	Q3 2003	41.6	3.7%	11.3%
Capacity utilization rate (%)[2]	Q2 2003	82.5	-1.2†	-1.1†
DOMESTIC DEMAND				
Retail trade ($ billions)	October*	26.4	0.2%	2.1%
New motor vehicle sales (thousands of units)	October	136.2	-2.3%	-7.5%
Wholesale trade ($ billions)	October*	36.6	-0.1%	2.4%
LABOUR				
Employment (millions)	November	15.9	0.3%	1.7%
Unemployment rate (%)	November	7.5	-0.1†	0.0†
Participation rate (%)	November	67.6	0.1†	0.3†
Average weekly earnings ($)	October*	694.14	0.3%	1.2%
Regular Employment Insurance beneficiaries (in thousands)	September	579.90	-1.2%	4.6%
INTERNATIONAL TRADE				
Merchandise exports ($ billions)	October	32.3	-4.2%	-9.2%
Merchandise imports ($ billions)	October	27.2	-1.7%	-9.9%
Merchandise trade balance (all figures in $ billions)	October	7.3	2.3	2.0
MANUFACTURING				
Shipments ($ billions)	October	42.5	-1.1%	-3.7%
New orders ($ billions)	October	41.7	-3.2%	-4.4%
Unfilled orders ($ billions)	October	37.7	-2.0%	-19.0%
Inventory/shipments ratio	October	1.41	0.01	-0.01
PRICES				
Consumer Price Index (1992=100)	November*	122.7	0.2%	1.6%
Industrial Product Price Index (1997=100)	November*	104.4	-0.4%	-4.0%
Raw Materials Price Index (1997=100)	November*	110.3	1.5%	-3.2%
New Housing Price Index (1992=100)	October	118.4	0.4%	5.0%

Note: *All series are seasonally adjusted with the exception of the price indexes.*
* *new this week*
† *percentage point*
[1] *1997 replaces 1992 as the base year used in determining prices for gross domestic product by industry. Also, valuation has been changed from factor cost to basic prices.*
[2] *Calculation of the rates of capacity use is now based on the 1997 North American Industry Classification System (NAICS), which has replaced the 1980 Standard Industrial Classification.*

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Products released from December 18, 2003 to January 7, 2004

SUBJECT AREA Title of product	Period	Catalogue number	Price ($) (issue/subscription)
AGRICULTURE			
Agriculture and rural working paper series : Factors associated with household Internet use in Canada	1998-2000	21-601-MIE2004066	Free
Cereals and oilseeds review	October 2003	22-007-XIB	12/120
Cereals and oilseeds review	October 2003	22-007-XPB	17/160
Farm product price index	October 2003	21-007-XIB	Free
Rural and small town Canada analysis bulletin : Factors associated with household Internet use	1998-2000	21-006-XIE	Free
Stocks of frozen and chilled meats	December 2003	23-009-XIE	Free
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's balance of international payments	Q2 2003	67-001-XPB	41/133
Canada's International Investment Position	Q3 2003	67-202-XIE	23/51
Canada's International Transactions in Securities	October 2003	67-002-XIE	15/142
CANADIAN CENTRE FOR JUSTICE STATISTICS			
Police resources in Canada	2003	85-225-XIE	28
CENSUS OPERATIONS			
Dwellings, Households and Shelter Costs, 2001 Census Technical Report	2001	92-382-XIE	Free
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
Education, Skills and Learning Research Papers: A New Understanding of Postsecondary Education in Canada: A Discussion Paper	No. 11	81-595-MIE2003011	Free
Government Expenditures on Culture: Data Tables		87F0001XIE	Free
International Travel	2001	66-201-XIE	34
CURRENT ECONOMIC ANALYSIS			
Canadian economic observer	December 2003	11-010-XIB	19/182
Canadian economic observer	December 2003	11-010-XPB	25/243
DEMOGRAPHY			
Report on the demographic situation in Canada	2001-2002	91-209-XPE	35
DISTRIBUTIVE TRADES			
Retail Trade	October 2003	63-005-XIB	18/166
Wholesale trade	October 2003	63-008-XIB	15/150
HEALTH STATISTICS			
Induced Abortion Statistics	2000	82-223-XIE	Free
HOUSING, FAMILY AND SOCIAL STATISTICS			
Aboriginal Peoples Survey 2001: initial release – Supporting tables 2	2001	89-595-XIE	Free
Aboriginal Peoples Survey 2001 - Internet community profiles (update)	2001	89-590-XIE	Free
A profile of disability in Canada	2001	89-577-XPB	Free
The Longitudinal Administrative Databank (LAD) and the Longitudinal Immigration Database (IMDB): Building the LAD_IMDB – a technical paper	1980-1999	89-612-XIE2003001	Free
INCOME AND EXPENDITURE ACCOUNTS			
Income and Expenditure Accounts technical series : International price and quantity comparisons: purchasing power parities and real expenditures, Canada and the United States	No. 25	13-604-MIB1993025	Free
Income and Expenditure Accounts technical series: National Income and Expenditure Accounts: revised estimates for the period from 1989 to 1992	1989-1992	13-604-MIB1993024	Free
Income and Expenditure Accounts technical series: The distribution of GDP at factor cost by sector	No. 26	13-604-MIB1993026	Free
Income and Expenditure Accounts Technical Series: The Provincial and Territorial Tourism Satellite Accounts for Canada	1996	13-604-MIE2002038	Free
Income and Expenditure Accounts technical series: The tourism satellite account	No. 31	13-604-MIB1994031	Free
Income and Expenditure Accounts technical series: The value of household work in Canada	1992	13-604-MIB1994027	Free
National income and expenditure accounts, quarterly estimates	Q3 2003	13-001-XIB	36/117
National income and expenditure accounts, quarterly estimates	Q3 2003	13-001-XPB	48/156
INCOME STATISTICS			
Income trends in Canada	1980-2001	13F0022XIE	195
Survey of Labour and Income Dynamics - Survey overview		75F0011XIE	Free
INDUSTRY MEASURES AND ANALYSIS			
Gross domestic product by industry	October 2003	15-001-XIE	12/118

Products released from December 18 2003 to January 7, 2004 – Concluded

SUBJECT AREA Title of product	Period	Catalogue number	Price ($) (issue/subscription)
INTERNATIONAL TRADE			
Exports by commodity	October 2003	65-004-XMB	40/387
Exports by commodity	October 2003	65-004-XPB	84/828
LABOUR STATISTICS			
Employment, earnings and hours	October 2003	72-002-XIB	26/257
MANUFACTURING, CONSTRUCTION AND ENERGY			
Construction type plywood	October 2003	35-001-XIB	6/51
Industrial chemicals and synthetic resins	October 2003	46-002-XIE	6/51
Mineral wool including fibrous glass insulation	November 2003	44-004-XIB	6/51
Particleboard, oriented strandboard and fibreboard	October 2003	36-003-XIB	6/51
Primary iron and steel	October 2003	41-001-XIB	6/51
Production and Disposition of Tobacco Products	November 2003	32-022-XIB	6/51
Production and shipments of steel pipe and tubing	October 2003	41-011-XIB	6/51
PRICES			
Canadian Foreign Post Indexes	January 2004	62-013-XIE	Free
The Consumer Price Index	November 2003	62-001-XIB	9/83
The Consumer Price Index	November 2003	62-001-XPB	12/111
PUBLIC INSTITUTIONS			
Financial Management System	2003	68F0023XIB	Free
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
Broadcasting and telecommunications	Vol. 33, no. 4	56-001-XIE	11/35
SERVICE INDUSTRIES			
Analytical paper series – Service Industries Division: Research and development in Canada's service sector	No. 46	63F0002XIE2003046	Free
Analytical paper series - Service Industries Division: Profile of campgrounds and outfitters	No. 47	63F0002XIE2003047	Free
Services indicators	Q3 2003	63-016-XIB	28/94
Services indicators	Q3 2003	63-016-XPB	38/125
SMALL AREA AND ADMINISTRATION DATA DIVISION			
Longitudinal administrative data dictionary	1982-2001	12-585-XIE	Free
Neighbourhood insights – Your guide to the statistical information packages available from Small Area and Administrative Data Division	2003	17-507-XIE	Free
TRANSPORTATION			
Aviation: Service Bulletin	Vol. 35, no. 6	51-004-XIB	9
Canadian Vehicle Survey: Quarterly	Q2 2003	53F0004XIE	Free
Rail in Canada	2001	52-216-XIE	39
Service Bulletin: Surface and Marine Transport	Vol. 19, no. 3	50-002-XIB	11

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