



Infomat

A Weekly Review

Friday, June 27, 2003

INSIDE

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◆ Surge in consumption taxes lifts government surplus

Driven by increased consumer demand in 2002/03, revenues from consumption taxes helped to lift the consolidated government surplus to \$8.3 billion. Overall revenues rose \$7.4 billion to \$473.8 billion, and expenditures increased by \$5.8 billion to \$465.5 billion.

◆ Canada's net liability to foreigners has increased substantially

The value of Canada's assets abroad, as well as its foreign liabilities, plunged dramatically during the first three months of 2003 in the wake of a surging Canadian dollar. Since the decline in international assets was four times the decrease in liabilities, Canada's net liability to foreigners increased substantially.

◆ School computers reduce rural-urban "digital divide"

High school students who live in rural areas are less likely to have a home computer than their counterparts in urban areas. In contrast, a higher percentage of students living in rural villages reported the daily use of a school computer (29% compared with 19% of students in cities).

Inflation keeps slowing down

Canadian consumers paid 2.9% more in May than they did in May 2002 for the goods and services included in the Consumer Price Index (CPI) basket. The 12-month increase continued to slow for the third consecutive month, as energy prices kept on falling from their recent highs. Excluding energy prices, the 12-month increase in the CPI was 2.7% for the second month in a row, after rising 3.2% in March.

On an annual basis, energy prices were 4.7% higher than in May 2002. This smaller increase primarily reflects falling gasoline prices and narrows the gap between the All-items CPI and the CPI excluding energy. Natural gas prices fell on a monthly basis, lowering the 12-month increase in this index from 49.6% in April to 35.3% in May. April's electricity index was 11.0% lower than in April 2002, as a majority of Ontario consumers received refunds. In May, the impact of those refunds was reduced. However, a small number of companies refunded their consumers during the month, keeping electricity prices 1.3% lower than in May 2002. This rebound in the electricity index, along with higher food prices, contributed to keeping the increase in the All-items CPI comparable to that of April (+3.0%).

(continued on page 2)

Consumer Price Index, May 2003
% change, previous year, not seasonally adjusted

	All items	Food	Shelter	Transportation	Energy
Canada	2.9	2.0	3.5	4.3	4.7
Newfoundland and Labrador	2.3	-0.2	3.1	5.6	2.3
Prince Edward Island	3.3	0.8	4.0	6.3	8.1
Nova Scotia	2.9	2.4	4.4	1.5	1.8
New Brunswick	3.2	2.5	2.2	5.1	1.5
Quebec	3.0	2.6	3.3	4.5	1.4
Ontario	2.7	1.6	3.0	4.5	5.1
Manitoba	1.5	1.8	1.3	0.8	-1.0
Saskatchewan	2.2	2.8	3.7	1.9	4.3
Alberta	4.8	2.4	9.5	8.2	20.3
British Columbia	1.9	2.0	2.0	2.1	3.0
Whitehorse	2.1	1.0	1.5	3.5	0.1
Yellowknife	2.5	2.5	2.4	2.9	9.0



Inflation keeps... (continued from page 1)

The monthly CPI edged up 0.1% from April to May, after falling from March to April. The rise in the electricity index (+10.9%) was the main factor behind this increase, as the refunds received by Ontario consumers tapered off.

Traveller accommodation prices were up 6.2%, as hotel operators introduced their summer rates. This increase contrasts with the average of 10.7% over the last five years. The slowdown in the economy continued to have a major impact on the Canadian hotel industry, while the Ontario market felt the additional effect of the outbreak of Severe Acute Respiratory Syndrome (SARS).

Cigarette prices increased 1.6%, mainly because of a manufacturer price increase in response to higher tobacco prices. Provincial sales taxes increased in Prince Edward Island and Manitoba.

From April to May, energy prices fell 2.2%, with all the components recording decreases except electricity. Gasoline prices once again decreased across Canada (-6.9%), with drops ranging from 4.1% in Newfoundland and Labrador to 10.4% in Nova Scotia. Natural gas prices fell 8.7% from April to May, the first drop in six months and the biggest in more than a year.

The seasonally adjusted CPI fell 0.1% in May from May 2002, following a 0.7% decrease in April. The transportation index (-1.4%) was the major contributor to this decline, largely because of lower gasoline prices. A drop in the seasonally adjusted index for recreation, education and reading also contributed to the monthly decrease. Increases for shelter, food, clothing and footwear, and alcoholic beverages and tobacco products partly offset the decreases.

The All-items index excluding the eight most volatile components as defined by the Bank of Canada increased 2.3% in May from May 2002. The main contributors to this increase were automotive vehicle insurance premiums (+23.1%) and homeowners' replacement cost (+6.4%). This index increased 0.5% from April to May.

*The May 2003 issue of **The Consumer Price Index** (Internet: 62-001-XIB, \$8/\$77; paper: 62-001-XPB, \$11/\$103) is now available. For more information, contact Louise Châiné (1-866-230-2248; 613-951-9606; infounit@statcan.ca) or Joanne Moreau (613-951-7130), Prices Division. (See also "Current trends" on page 7.)*



Quarterly Bulletin from the Culture Statistics Program
Summer no. 27 (vol. 14)
May 2003

Facing the challenge: Performing arts in the 1990s
By Marie Lavallée-Faruch

At home and around the world, Canada's not-for-profit professional performing arts companies maintain their audience with a wide range of theatre, music, dance and opera. On stage are innovative local works, which reflect historical and contemporary Canadian experiences, and new productions based on international repertoires. If, as it is argued, performing arts bring prestige, tourism and cultural, economic and social benefits to our cities and the nation, these benefits provide a rationale, in turn, for public and private investment in the performing arts.

The performing arts infrastructure in Canada is bolstered by a number of federal, provincial and municipal support programs, business associations, volunteer workers, and audience arts. The growth in the number of not-for-profit (NFP) professional performing arts companies in Canada has been tremendous over the last two decades. Since 1991-92 alone there has been a 20% increase in the number of companies active across the country. In the 1996-99 fiscal year, there were 105 NFP professional performing arts companies in Canada in the fields of theatre, music, dance and opera.

Focus on culture

Focus on culture, Statistics Canada's quarterly publication about culture statistics, presents analysis of important cultural issues and trends. The latest release features the article "Hitting a high note: Canadian recording artists in 1998," which examines the sound recording sector.

This issue also contains an article on the donating of time and money by Canadians to culture and arts organizations that compares 2000 and 1997, as well as provincial data on movie attendance.

Focus on culture, Vol. 14, no. 2 (Internet: 87-004-XIE, \$7/\$20; paper: 87-004-XPB, \$9/\$27) is now available. For more information, contact Client Services (1-800-307-3382; cult.tourstats@statcan.ca) or Mary Cromie (613-951-6864; mary.cromie@statcan.ca), *Culture, Tourism and the Centre for Education Statistics*.

Retail sales suffer another setback

Retail sales suffered a second consecutive monthly decline in April. Sales fell 0.9% in April and 0.8% in March, cancelling out the 1.8% gain in February. These declines left consumer spending in retail stores at \$26.1 billion in April, virtually the same as in January. Previously, retail sales had generally been increasing since the September 2001 slump.

A sizable, price-induced sales decline by gasoline service stations and the impact of the outbreak of SARS on some Ontario retailers contributed to lower national retail sales in April.

Lower sales by gasoline service stations (-10.9%), automotive parts, accessories and services stores (-0.7%) and motor and recreational vehicle dealers (-0.3%) led to the sales decrease in the automotive sector in April. According to the Consumer Price Index, prices of gasoline declined 9.0% on average from March to April.

The reduced consumer spending in clothing stores in April came from lower purchases in men's clothing stores (-3.1%), shoe stores (-2.8%) and women's clothing stores (-2.0%). Retailers in the "other clothing" category posted the only sales gain in April (+0.5%).

In April, consumers spent 0.4% less in furniture stores, after increasing their purchases by 1.0% in March. Sales gains in furniture stores have been relatively modest since early 2002, compared to the strong growth observed from October 2001 to January 2002 (+10.0%).

Sales in the general merchandise sector remained essentially unchanged in April (-0.1%), after falling 1.3% in March. Within this sector, increased consumer spending in stores classified in the "other general merchandise" category (+1.8%) was offset by a 1.4% sales decline in department stores.

Retailers in Ontario experienced weaker sales (-2.6%) in April. Part of this decline can be attributed to the SARS outbreak in Toronto. However, lower gasoline prices at the pump also

Retail sales, April 2003 Seasonally adjusted

	\$ millions	% change, previous month	% change, previous year
Canada	26,073	-0.9	2.2
Newfoundland and Labrador	444	0.4	4.1
Prince Edward Island	112	1.4	-1.0
Nova Scotia	778	0.7	2.5
New Brunswick	621	1.8	2.9
Quebec	6,029	-0.6	3.4
Ontario	9,667	-2.6	0.7
Manitoba	897	-0.5	-1.1
Saskatchewan	787	-1.3	5.8
Alberta	3,240	0.4	4.5
British Columbia	3,405	1.1	2.3
Yukon	33	-4.1	11.9
Northwest Territories	41	-8.9	-2.4
Nunavut	18	0.3	9.1

contributed to push down the dollar value of retail sales. April's decline in Ontario brought retail sales back to their summer 2002 levels. The reduction in consumer spending reported by retailers in the Toronto metropolitan area (-3.8%) was more than twice the decline observed in the rest of the province (-1.8%).

Saskatchewan (-1.3%), Quebec (-0.6%) and Manitoba (-0.5%) also posted lower retail sales in April. Most of the decline in Saskatchewan came from the auto sector, where sales of new motor vehicles dropped 11.5% in April. In Quebec, April's sales decline primarily originated from clothing stores and stores classified in the "other retail" category. Most retailers in Manitoba experienced lower sales in April, with the exception of food stores.

The April 2003 issue of Retail trade (Internet: 63-005-XIB, \$16/\$155) is now available. For more information, contact Paul Gratton (613-951-3541; paul.gratton@statcan.ca), Distributive Trades Division.

Perspectives on labour and income

The June 2003 online edition of *Perspectives on labour and income* features two articles. "Sources of workplace stress" looks at what triggers stress for various people in the workplace. For some, it is the demands of the job; for others, it is fear of accident or injury. A second article, "Productivity and prosperity in the information age," describes productivity trends since 1981, the role of different industries and information technology in the recent acceleration, and the implications for Canada's prosperity.

The June 2003 online edition of Perspectives on labour and income (75-001-XIE, \$5/\$48) is now available. For more information, contact Henry Pold (613-951-4608; henry.pold@statcan.ca), Labour and Household Surveys Analysis Division.

Surge in consumption taxes lifts government surplus

Driven by increased consumer demand in 2002/03, revenues from consumption taxes helped to lift the consolidated government surplus to \$8.3 billion from \$6.7 billion in 2001/02 (in current dollars).

A surge of \$8.2 billion in consumption taxes, plus an extra \$4.0 billion in property taxes and contributions to the Canada and Quebec pension plans, offset a \$7.5 billion reduction in income tax collections. Overall revenues rose \$7.4 billion to \$473.8 billion.

On the expenditure side, debt charges declined by \$4.0 billion, whereas health expenditures climbed \$3.4 billion and social services rose \$4.7 billion. Overall expenditures increased by \$5.8 billion to \$465.5 billion.

The combined federal government and Canada and Quebec pension plans had a surplus of \$13.9 billion. However, this contrasted sharply with the combined \$5.6 billion deficit of the provincial and local governments.

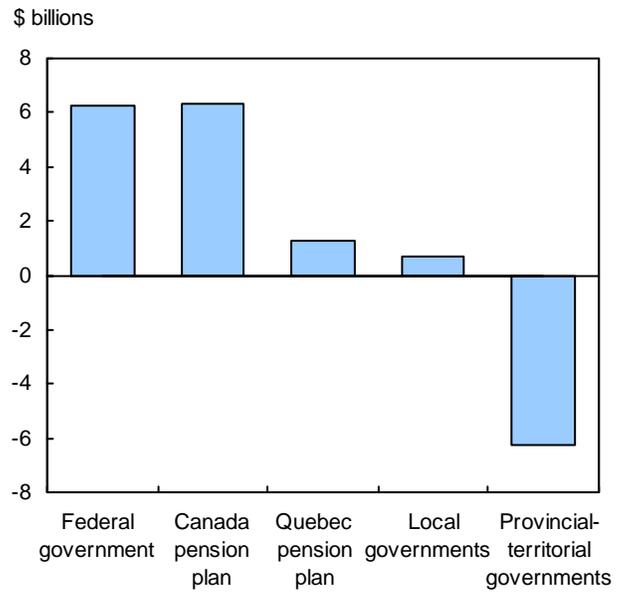
Consolidated government personal income tax collections fell for the first time since 1993/94, dropping \$3.8 billion to \$140.5 billion. This was mainly due to the weakness in the stock markets and to federal tax reductions. Corporate income tax collections dropped for a second consecutive year, down \$8.7 billion to \$34.7 billion, largely reflecting weak profit performance the previous year.

Federal personal and corporate income taxes declined by \$6.4 billion, causing total revenues to go down for a second consecutive year. At the provincial level, personal income tax collections remained flat, whereas corporate taxes fell \$1.5 billion in 2002/03.

British Columbia experienced a severe drop of \$1.7 billion in combined personal and corporate income tax revenues. The largest growth rates in income tax receipts were in Saskatchewan, Newfoundland and Labrador and Prince Edward Island. Personal income taxes in Ontario continued to decline, but corporate taxes in Ontario increased by \$0.3 billion in 2002/03. Alberta saw a \$0.4 billion increase in personal income taxes, whereas corporate taxes there decreased by \$0.2 billion.

The federal government collected \$44.4 billion in consumption taxes, up \$4.7 billion from 2001/02. This is in line with strong new housing construction and durable goods purchases. The goods and services tax accounted for almost three-quarters of the collections (\$31.3 billion) and custom duties, tobacco, gasoline

Government surpluses and deficits



and other taxes accounted for the rest. The new Federal Air Travellers Security Charge generated revenues of \$0.4 billion.

At the provincial level, consumption taxes increased by \$3.6 billion, reaching \$52.4 billion in 2002/03. Quebec (+\$1.3 billion) and Ontario (+\$1.1 billion) recorded the largest increases. Among consumption taxes, the alcoholic beverages and tobacco category grew 36.2% or \$1.3 billion, with Ontario contributing the most to this increase (+\$0.5 billion) and Alberta recording the highest growth rate, at 66%.

Local general governments (which exclude school boards) have seen revenue growth lag behind expenditures for the last three years, resulting in a deficit of \$41 million — the first in five years. In 2002, municipal revenue increased by \$666 million or 1.4%. An \$815 million increase in property and related taxes, municipalities' primary own source of revenue, helped prevent the deficit from being larger by compensating for a reduction of \$302 million in provincial transfers.

*The 2002/03 issue of **Public sector statistics — Supplement** (68-213-SIE, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Jean-François Carboneau (613-951-8561), Public Institutions Division.*

Canada's net liability to foreigners has increased substantially

The value of Canada's assets abroad, as well as its foreign liabilities, plunged dramatically during the first three months of 2003 in the wake of a surging Canadian dollar. Since the decline in international assets was four times the decrease in liabilities, Canada's net liability to foreigners — the difference between its external assets and foreign liabilities — increased substantially.

The value of international assets fell to \$949.2 billion, a drop of \$34.1 billion from their 2002 year-end level. The dollar, which gained 7% in value in relation to the US dollar from January to March, removed \$60.4 billion from the value of these assets, most of which are in US dollars. This more than offset any gains resulting from new acquisitions.

At the same time, the nation's international liabilities declined \$7.9 billion to \$1,159.4 billion. This impact of the strengthening dollar was partly offset by increased activity in international borrowing.

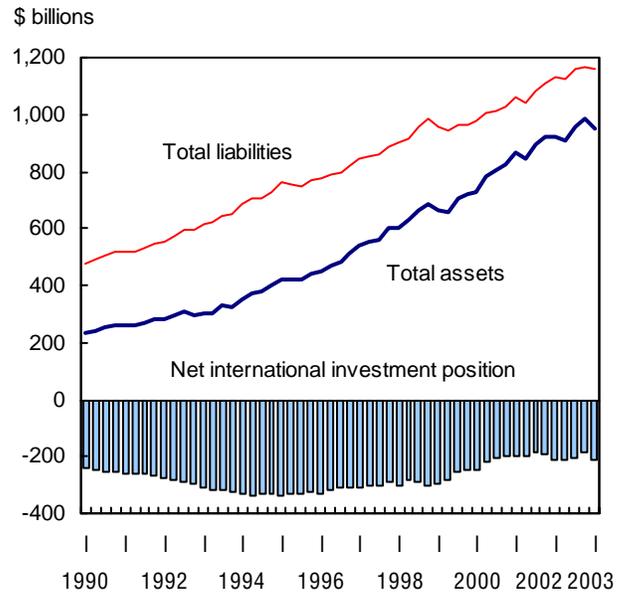
As a result, Canada's net foreign liability rose from a record low of \$184.0 billion at the end of 2002 to \$210.3 billion at the end of March 2003. This leaves the ratio of external debt to gross domestic product at 17%, within the range observed during the past 11 quarters and well below the peak of 44% in 1994.

The stronger loonie had its largest impact on the value of Canadian direct investment abroad, which fell by \$24.9 billion to \$406.9 billion. The pace of acquisitions of foreign enterprises has slowed to virtually nothing in recent quarters, as most of the foreign direct investment in the first quarter went to existing affiliates.

As well, a weak equity market in the first quarter and the rise of the Canadian dollar translated into an 8% decrease in the value of foreign stock held by Canadians. Canadians' foreign stock investments declined by \$17.0 billion to \$202.2 billion. A large share of the decline, about \$9.7 billion, occurred in the United States. Canadians' bond liabilities were also down, by \$11.6 billion to \$432.1 billion, despite first quarter acquisitions.

With four consecutive quarters of slow investment, foreign direct investors added less than 1% to their foreign direct investment position in Canada. This type of investment, always denominated in Canadian dollars, reached \$352.5 billion at the end of March.

Canada's international investment position



Canada's net foreign liability position has been on a downward trend for the past nine years. At the end of 2002, it had hit a record low of \$184.0 billion. This was down from \$189.4 billion at the end of 2001, and well below the net liability of \$243.7 billion in 1999.

American investors hold an increasing proportion of Canada's net liabilities. Since 2001, however, Canada has been in a net asset position with all other countries as a group.

Canada has decreased its net liability with the European Union over the past five years, reducing it by more than one-third, to \$52.4 billion. Japan, which has also steadily decreased its position of net creditor to Canada, holds \$19.3 billion of Canada's international liabilities, down from \$42.3 billion five years ago.

*The first quarter 2003 issue of **Canada's international investment position** (Internet: 67-202-XIE, \$21/\$47) will be available soon. For more information, contact Christian Lajule (613-951-2062) or Éric Simard (613-951-7244), Balance of Payments Division.*

School computers reduce rural–urban “digital divide”

Schools appear to play a vital role in bridging a “digital divide” between rural and urban high school students in terms of access to, and use of, computers. This study examined the rural–urban gap in Information and Communication Technology (ICT) resources in Canadian schools, as well as gaps in the use of, and access to, ICT among Canadian high school students, based on sex and socio-economic status.

The vast majority of urban and rural youth (around 96%) reported using a computer during the year prior to the 2000 General Social Survey (GSS). However, the study showed that high school students who live in rural areas are less likely to have a home computer than their counterparts in urban areas. In contrast, a higher percentage of students living in rural villages reported the daily use of a school computer (29% compared with 19% of students in cities).

Rural schools appear to face various disadvantages when compared with urban schools. They reported less access to educational software, as well as less use of specialized and subject-specific software. Their teachers were also less likely to have different types of technical training. In contrast, there were more computers per student reported in the rural schools.

However, there are two other forms of digital divide that subsists: the gap between male and female students, and the gap between students whose parents have low levels of education and those whose parents are highly educated.

Although there was but a slight digital divide between the sexes in computer access, and both reported similar levels of use, males tended to use computers in more diverse ways, such as programming and desktop publishing.

Data revealed that students with less-educated parents were not as likely to have access to home computers. Students who reported that they had not used a computer in the year prior to the GSS also tended to have at least one parent with a lower level of education. However, these students generally accessed school and community computers as much as students whose parents had higher levels of education. This suggests that those from households of lower socio-economic status were not disadvantaged in schools.

*The research paper **The digital divide in Canadian schools: Factors affecting student access to and use of information technology** (81-597-XIE, free) is now available on Statistics Canada’s website (www.statcan.ca). For more information, contact E. Dianne Looker (902-585-1257), Acadia University, or Victor Thiessen (902-494-6757), Dalhousie University.*

Canada’s international transactions in securities

Foreign investors added \$4.8 billion to their holdings of Canadian securities in April, their third consecutive month of large investments. At the same time, Canadian investors continued to buy large amounts of foreign bonds, while reducing their holdings of foreign equities.

Foreign investors continued to invest heavily in Canadian bonds in April, adding \$3.7 billion to the \$13.0 billion they invested in the previous two months. In addition, they increased holdings of Canadian money market instruments by \$0.7 billion in April, reducing their year-to-date divestment to \$0.5 billion. In April, foreign investors purchased \$0.4 billion worth of Canadian stocks, reversing a similar divestment in March.

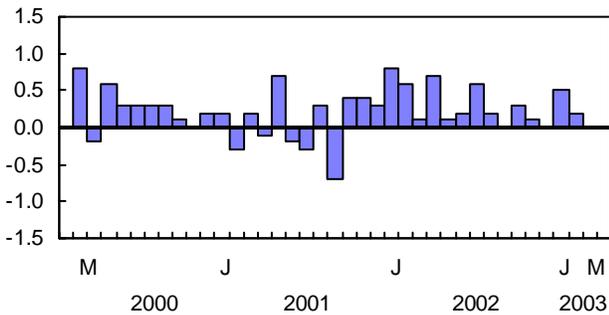
Canadian investors bought foreign bonds for the fourth consecutive month, adding a large \$1.7 billion in April and bringing their investment so far in 2003 to \$5.3 billion. In contrast, after selling off a record \$2.2 billion in foreign equities in March, Canadian investors continued to reduce their holdings by a smaller \$0.6 billion in April. Reductions in foreign equity portfolios of the Canadian mutual fund industry continued to be the impetus behind this selling of foreign equities.

*The April 2003 issue of **Canada’s international transactions in securities** (Internet: 67-002-XIE, \$14/\$132) is now available. For more information, contact Donald Granger (613-951-1864), Balance of Payments Division.*

Current trends

Gross domestic product

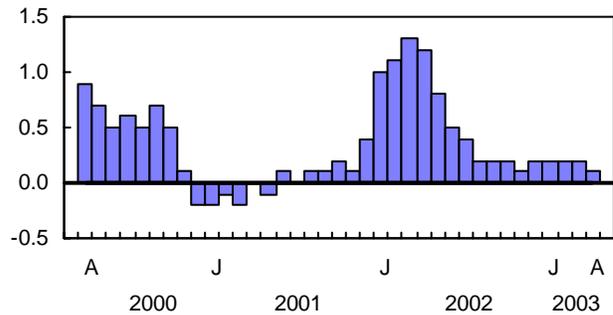
% change, previous month



Total economic activity was unchanged in March, after a gain of 0.2% in February.

Composite Index

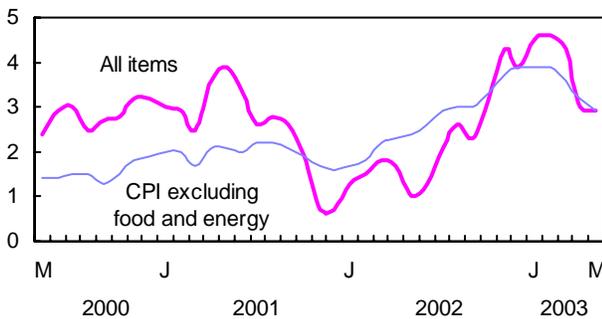
% change, previous month



The leading indicator grew 0.1% in April after rising 0.2% in March.

Consumer Price Index

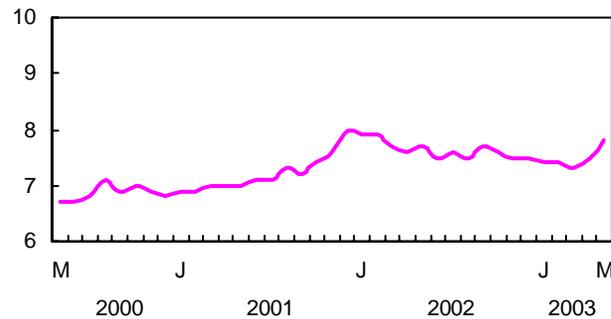
% change, previous year



Consumer prices for goods and services were 2.9% higher in May than they were a year earlier. Excluding food and energy, prices also rose 2.9%.

Unemployment rate

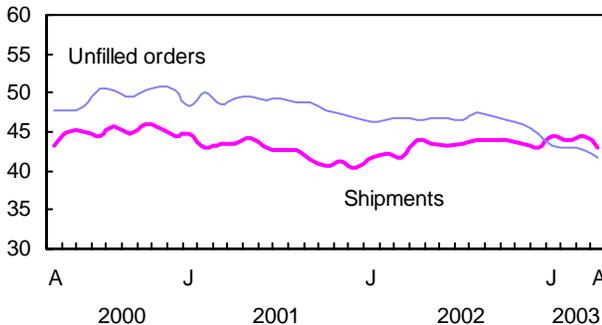
%



In May, the unemployment rate rose 0.3 percentage points to 7.8%.

Manufacturing

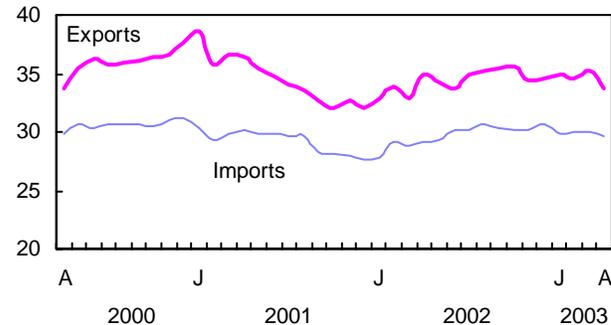
\$ billions



Manufacturers' shipments fell 3.4% in April to \$43.0 billion. The backlog of unfilled orders declined 1.9% to \$41.8 billion.

Merchandise trade

\$ billions



In April, the value of merchandise exports dropped 4.5% to \$33.7 billion. Imports fell 1.3% to \$29.6 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	March	995.7	0.0%	3.2%
Composite Index (1992=100)	May*	181.5	0.2%	2.8%
Operating profits of enterprises (\$ billions)	Q1 2003	42.9	10.6%	26.6%
Capacity utilization rate (%) ²	Q1 2003	82.8	0.3†	1.2†
DOMESTIC DEMAND				
Retail trade (\$ billions)	April*	26.1	-0.9%	2.2%
New motor vehicle sales (thousands of units)	April	132.5	-3.8%	-7.4%
Wholesale trade (\$ billions)	April*	35.9	-1.1%	3.2%
LABOUR				
Employment (millions)	May	15.7	-0.1%	2.3%
Unemployment rate (%)	May	7.8	0.3†	0.1†
Participation rate (%)	May	67.5	0.1†	0.7†
Average weekly earnings (\$)	April*	687.17	0.1%	1.3%
Regular Employment Insurance beneficiaries (in thousands)	March	535.2	0.7%	-2.8%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	April	33.7	-4.5%	-3.3%
Merchandise imports (\$ billions)	April	29.6	-1.3%	1.7%
Merchandise trade balance (all figures in \$ billions)	April	4.1	-1.2	-1.7
MANUFACTURING				
Shipments (\$ billions)	April	43.0	-3.4%	-2.3%
New orders (\$ billions)	April	42.2	-4.5%	-3.5%
Unfilled orders (\$ billions)	April	41.8	-1.9%	-10.4%
Inventory/shipments ratio	April	1.49	0.06	0.08
PRICES				
Consumer Price Index (1992=100)	May*	122.0	0.1%	2.9%
Industrial Product Price Index (1997=100)	April	107.6	-1.4%	-0.1%
Raw Materials Price Index (1997=100)	April	116.2	-6.5%	3.4%
New Housing Price Index (1992=100)	April	114.3	0.4%	4.5%

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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A weekly review

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Products released from June 19 to 25, 2003

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Cereals and oilseeds review	April 2003	22-007-XIB	11/112
Cereals and oilseeds review	April 2003	22-007-XPB	15/149
ANALYTICAL STUDIES			
The rise in low-income rates among immigrants in Canada		11F0019MIE2003198	free
BALANCE OF PAYMENTS AND FINANCIAL FLOWS			
Canada's international transactions in securities	April 2003	67-002-XIE	14/132
CANADIAN CENTRE FOR JUSTICE STATISTICS			
Crime and justice research paper series: An examination of sex differences in delinquency	1994-1999	85-561-MIE2003001	free
Crime and Justice research paper series: Childhood aggression and exposure to violence in the home		85-561-MIE2003002	free
Family violence in Canada: A statistical profile	2003	85-224-XIE	free
Juristat: Canada's shelters for abused women	2001-2002	85-002-XIE2003004	8/70
Juristat: Canada's shelters for abused women	2001-2002	85-002-XPE2003004	10/93
Juristat: Youth court statistics	2001/02	85-002-XIE2003003	8/70
Juristat: Youth court statistics	2001/02	85-002-XPE2003003	10/93
Transition home fact sheets	2001/02	85-404-XIE	free
CENSUS OPERATIONS			
2001 Census results teacher's kit, Lesson 12		92F0192XIE	free
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