



Infommat

A Weekly Review

Friday, December 19, 2003

INSIDE

◆ SPOTLIGHT: Gambling

Today's *Spotlight* is on gambling. Statistics Canada's first-ever study on compulsive gambling shows that 1.2 million adult Canadians – just over one in 20 – were, or had the potential to become, problem gamblers last year. Constant gambling and excessive spending can take its toll in many facets of life, particularly personal and family finances, as well as an individual's health.

◆ \$1-billion plunge in merchandise trade surplus

Canada's merchandise trade surplus with the rest of the world plunged by nearly \$1 billion in October, as weak exports, particularly to the United States, stalled trade growth.

◆ E-commerce still a tiny fraction of total spending

Internet shopping remained a tiny fraction of total personal spending last year, but Canadians increasingly used the Internet as a method of buying everything from airplane tickets to books. In total, Canadian households spent just over \$2.4 billion shopping on the Internet in 2002.



Happy Holidays!

Publication will resume on
January 9, 2004.

Factory shipments decline after big rebound

Manufacturers' shipments continued their roller-coaster ride in October, falling for the sixth time in 10 months as the Canadian dollar reached a 10-year high against its American counterpart.

Factories shipped \$42.5 billion in goods in October, down 1.1% from the previous month. This followed a 5.4% gain in September when manufacturers rebounded from the mid-August power blackout.

The decline in shipments was accompanied by an across-the-board drop in inventories, unfilled orders and new orders.

October marked the return to more normal shipment levels in some industries following quarter-end boosts to production in September and the rebound after the blackout. Lower industrial prices also contributed, as did the soaring Canadian dollar.

(continued on page 2)

Manufacturers report fewer shipments in October



Factory shipments fall... (continued from page 1)

The economic recovery continued in the United States, where factory shipments rose 0.7%, the fifth increase in the last six months. For the first 10 months of 2003, US shipments were 2.1% higher than in the same period last year, compared with a 0.9% decline in Canada.

In Canada, October's decline spanned 15 of 21 industries, accounting for 71% of total shipments. It was led by decreases in shipments of computer and electronic products and motor vehicles. Lower industrial prices resulted in fewer shipments of chemical products and petroleum and coal products.

On the other hand, food manufacturers benefited from the re-opening of the US border to selected exports of Canadian beef products. Shipments of boneless beef contributed to a 2.7% gain in food shipments in October, the first full month since the ban on Canadian beef was partly lifted.

Factory shipments fell in eight provinces. The biggest decline in dollar terms occurred in Ontario where shipments slipped 1.0% to \$22.7 billion, following a 9.0% blackout-related recovery in

September. Decreases in Ontario's computer and chemical industries offset a strong boost in food manufacturing.

Lower prices for paper and wood products contributed to 3.7% decrease in shipments by manufacturers in British Columbia. Quebec's shipments fell 1.0%, mainly in the computer and paper industries.

Inventories fell for the sixth month in a row. Three industries were primary contributors: aerospace, fabricated metal products and wood products.

The finished-product inventory-to-shipment ratio remained unchanged at 0.44 for the second consecutive month. This ratio is a measure of the time that would be required to exhaust finished products if shipments were to remain at their current level.

Unfilled orders hit a six-year low, while new orders fell 3.2% following a 7.6% gain in September. Widespread decreases were reported in new orders, led by the computer and plastics and rubber products industries.

For more information, contact Russell Kowaluk (613-951-0600), Manufacturing, Construction and Energy Division.

Composite leading index rises again

The composite leading index — a key gauge of future economic growth — rose 0.8% in November after gains of 0.7% in October and 0.8% in September. These were the best three months of growth since early 2002.

Overall, only one of the 10 components, the housing index, declined. Business spending, which led November's gains, posted its largest and most widespread increase in several months. Led by investment goods, new orders rose for the second time in three months, and the 2% advance allowed them to recoup a large part of the ground lost earlier this year.

The ratio of shipments to finished goods inventories rose for the first time in 14 months. With demand rising, manufacturers ended five months of trimming the workweek, while employment turned up. Business services drove the upturn in services employment over the last three months.

Furniture and appliance sales spearheaded household spending with a third straight gain of over 1%. Sales of other durable goods posted a sixth straight increase.

The US leading indicator grew steadily at 0.4%, with nine out of 10 components rising. Manufacturing picked up after widespread gains in final demand.

For more information, contact Francine Roy (613-951-3627), Current Economic Analysis Group.

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SPOTLIGHT: Gambling

One in 20 adults may be 'problem' gamblers

Just over one in 20 adult Canadians were, or had the potential to become, problem gamblers last year, according to Statistics Canada's first-ever study on compulsive gambling.

The study estimates that 1.2 million adult Canadians were at risk of experiencing a problem with gambling, or were problem gamblers.

Of these, an estimated 700,000 were at low risk, another 370,000 at moderate risk, and 120,000 were already problem gamblers. That is, they had suffered adverse effects from their gambling behaviour, such as financial or social problems, anxiety or depression, or dependence on alcohol.

These 1.2 million individuals represented 5% of the total adult population, and 6% of all gamblers.

Those most likely to be in the at-risk or problem categories were men, Aboriginal persons, those with less education, individuals who played video lottery terminals (VLTs), and people who gambled frequently.

An estimated three-quarters of adult Canadians spent money on some form of gambling in 2002, the majority doing so without problems.

In 2002, an estimated 18.9 million adult Canadians wagered \$11.3 billion on everything from VLTs, lottery tickets and bingos to blackjack and slot machines in casinos. This amount was more than a four-fold increase from \$2.7 billion a decade earlier.

The surge in the gambling industry began during the 1990s when provincial governments began legalizing permanent casinos and VLTs. In 2002, 76% of Canadians reported that they had spent money gambling in the previous year, four in 10 on a weekly basis.

One out of every four people whose gambling included VLTs were at-risk or problem gamblers, confirming the much-reported notion that VLTs are the "crack cocaine" of gambling. Those who

Quick glance: Gambling in Canada

Revenues (net of prizes) from government-run lotteries, video lottery terminals and casinos reached \$11.3 billion in 2002, four times higher than a decade earlier.

Governments realized profits from gambling of \$6.0 billion, three and a half times the profit in 1992.

Lotteries accounted for 27% of all non-charity gambling net revenues; casinos, 34%; video lottery terminals, 23%; and slot machines outside casinos, 17%.

Women occupied 55% of the 42,000 jobs in gambling in 2002, compared with 46% of jobs in non-gambling industries.

On average, Canadians aged 18 and over each spent \$447 on gambling in 2001, compared with \$130 in 1992. The average varied from a low of \$105 in the three territories to a high of \$604 in Alberta.

bought only lottery tickets had the lowest chance of becoming problem gamblers.

About 8% of adult men were at-risk or problem gamblers, compared with 5% of women. This may be because men and women tend to gamble for different reasons and in different ways. Men were more likely to play VLTs and bet on horse racing, while twice as many women played bingo.

Manitoba and Saskatchewan had considerably higher proportions of at-risk gamblers than other provinces. This may be because they have the highest VLT participation rates in the country, above-average Aboriginal populations, and, along with Ontario, the highest attendance rates at casinos.

You can read the article *Fighting the odds* in the December 2003 online edition of *Perspectives on Labour and Income* (75-001-XIE) on Statistics Canada's website (www.statcan.ca).

For more information, contact Katherine Marshall (613-951-6890), Labour and Household Surveys Analysis Division.

Compulsive gambling takes toll on health, relationships

Constant gambling and excessive spending can take its toll in many facets of life, particularly personal and family finances, as well as an individual's health.

Half of all problem gamblers reported that their gambling caused difficulties in relationships with family or friends. Four in 10 obsessive gamblers reported a high level of stress in their life, compared with 23% of gamblers who reported no problems.

About 18% of problem gamblers reported that they had contemplated suicide in the year prior to the survey, six times the proportion (3%) of non-problem gamblers.

The insidiousness of excess gambling is revealed by the one-quarter of moderate-risk gamblers and two-thirds of problem gamblers who wanted to stop gambling in the year prior to the survey, but believed they could not. About 56% of problem gamblers had tried to quit, but couldn't.

Frequent gambling quickly lightens the wallet. About 62% of problem gamblers spent more than \$1,000 a year on gambling, compared with only 4% of people who gambled with no problem.

\$1-billion plunge in merchandise trade surplus

Canada's merchandise trade surplus with the rest of the world plunged by nearly \$1 billion in October, as weak exports, particularly to the United States, stalled trade growth.

Canadian companies exported \$32.3 billion in merchandise in October, a 4.2% decline, which erased most of September's recovery. Exports were higher than in August, but otherwise at their lowest level since October 1999. Imports fell 1.7% to \$27.2 billion.

As a result, the nation's trade surplus with the rest of the world fell from \$6.04 billion to \$5.09 billion.

The United States was the major factor in most of these movements because of its high trade concentration with Canada. Exports south of the border declined 3.8% to \$26.6 billion, partly as a result of the continued appreciation of the Canadian dollar against the US dollar. Imports from the United States fell 1.6% to \$19.2 billion.

Exports to regions other than the United States declined 6.0% to \$5.7 billion, while imports were down 1.9% to about \$8 billion. The difference, Canada's non-US trade deficit, widened to \$2.3 billion.

Merchandise exports decreased for all trade sectors, except for a 1.4% gain in industrial goods and materials.

Exports of automotive products dipped, as did machinery and equipment exports, which halted two months of gains. The largest declines were in the areas of agricultural machinery and other equipment and tools.

Exports of natural gas fell by more than \$300 million, a 12.8% decline, as a result of lower prices and volumes. Prices fell 5%, as consumers got a breather before the arrival of the peak winter demand season.

Electricity exports represent only a fraction of Canada's total energy trade. However, October's export level, \$66 million, was the lowest in over 10 years.

Merchandise trade

	September 2003 ¹	October 2003	September to October 2003	October 2002 to October 2003
	\$ millions		% change	
	seasonally adjusted, \$ current			
Principal trading partners				
Exports				
United States	27,666	26,606	-3.8	-10.4
Japan	815	710	-12.9	-27.2
European Union	1,923	2,004	4.2	8.5
Other OECD countries ¹	1,120	1,173	4.7	-0.6
All other countries	2,237	1,841	-17.7	-4.5
Total	33,761	32,334	-4.2	-9.2
Imports				
United States	19,556	19,238	-1.6	-10.6
Japan	790	800	1.3	-15.1
European Union	2,815	2,547	-9.5	-17.6
Other OECD countries ¹	1,552	1,601	3.2	-4.6
All other countries	3,009	3,062	1.8	1.4
Total	27,722	27,247	-1.7	-9.9

¹ revised

Most provinces reported declines, for a variety of reasons, including unfavourable international prices, strong provincial demand from industrial activity and dry conditions, decreasing hydro-generation surpluses.

Only one import sector – the automotive – showed any improvement in October, despite the higher Canadian dollar. Automotive imports edged up 1.8% to \$6.2 billion.

The machinery and equipment sector accounted for over 90% of the overall decline in imports.

For more information, contact Matthew MacDonald (613-951-8551), International Trade Division.

New motor vehicle sales fall for third consecutive month

New motor vehicle sales fell for the third consecutive month in October, and the outlook is for another decline in November.

Dealers sold 136,193 new motor vehicles in October, down 2.3%. This follows declines of 2.4% in September and 1.7% in August.

Based on preliminary figures from the automobile industry, sales will be down another 2% in November, because of poor truck sales.

Sales between January and October this year are 4.2% below the level for the same period of 2002, which was a record year.

Dealers sold 70,221 new passenger cars in October, down 1.5% from September, as well as 65,972 new trucks, a 3.2% decrease.

Sales of new motor vehicles declined in most provinces, except for Nova Scotia where they rose 13.5%, and Prince Edward Island and Newfoundland and Labrador.

For more information, contact Clérance Kimanyi (613-951-6363), Distributive Trades Division.

E-commerce still a tiny fraction of total spending

Internet shopping remained a tiny fraction of total personal spending last year, but Canadians increasingly used the Internet as a method of buying everything from airplane tickets to books.

In total, Canadian households spent just over \$2.4 billion shopping on the Internet, up 35% from \$1.8 billion spent online in 2001. Total personal spending amounted to \$656 billion in 2002.

The growth rate far exceeded the 4% increase in the number of households that accessed the Internet from any location in 2002.

An estimated 2.8 million Canadian households actively participated in e-commerce, up from 2.2 million. These households represented 19% of the total, up from 15% in 2001. In total, they placed 16.6 million orders.

About 1.7 million households reported that they used the Internet only to window-shop, virtually unchanged from 2001. This group browsed online catalogues to narrow their purchasing decisions, but did not place orders or make purchases online. They represented 14% of all Canadian households.

For every \$10 spent by households on Internet purchases in 2002, \$6.36 was spent on Canadian websites. In 2002, Canadians spent \$884 million of their e-commerce dollars at non-Canadian websites.

Of these window-shoppers, almost one-half indicated that they later made purchases directly from vendors, indicating that online catalogues are an effective means of obtaining walk-in or telephone orders.

Many households still had reservations about buying online. More than three-quarters of the 2.3 million households that paid online indicated that they were concerned, or very concerned, about financial transactions conducted over the Internet.

Reading materials such as books, magazines and newspapers were still the most popular online purchases in 2002. However, consumers are increasingly using the Internet to make travel arrangements, as well as clothing, jewelry and accessories.

On average, e-commerce households spent \$876 annually online, with an average value per order of \$146 in 2002. The average expenditure per household and the average dollar value per order were above the national average for all provinces west of Quebec.

Households in Ontario accounted for the lion's share of the increase in e-commerce spending in 2002. They represented nearly one-half (49%) of the \$2.4 billion total in e-commerce spending in 2002, up from 47% in 2001. They also placed nearly one-half of all orders made online.

Households in British Columbia were Canada's second largest market for electronic commerce. They spent about \$424 million on Internet purchases, almost 18% of the national total.

For more information, contact Jonathan Ellison (613-951-5882), Science, Innovation, and Electronic Information Division.

Strongest gain in labour productivity in over a year

Labour productivity in Canada's business sector increased 0.7% in the third quarter compared with the second, the strongest quarterly gain in more than a year.

This increase put an end to a lacklustre performance during the last five quarters, when productivity ranged between a gain of 0.3% and a decline of 0.5%.

In the United States, labour productivity rose 2.1%, three times Canada's pace. However, this figure is still subject to revision. The bigger gain in the United States was due to its exceptional increase in economic output.

In returning to stronger productivity growth, Canadian businesses experienced a slight increase in economic activity, despite the mid-August power outage in Ontario. They were able to increase output slightly without hiring more workers.

So far this year, economic activity in Canada has been affected by an exceptional combination of negative shocks. These include SARS, mad cow disease, the blackout, forest fires in British Columbia and the rising value of the Canadian dollar.

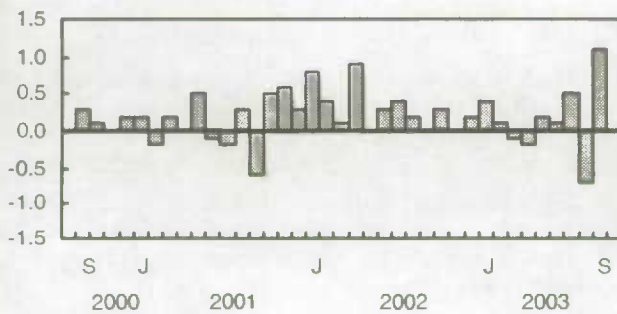
American businesses also held a significant advantage over Canadian businesses with respect to changes in labour costs. In Canada, unit labour costs rose 2.8% from the third quarter last year, compared with a 2.1% decline south of the border.

For more information, contact Jean-Pierre Maynard (613-951-3654), Micro-Economic Analysis Division.

Current trends

Gross domestic product

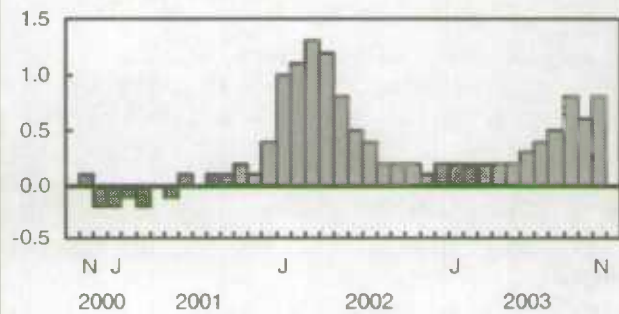
% change, previous month



Total economic activity increased 1.1% in September, after a 0.7% decrease in August.

Composite Index

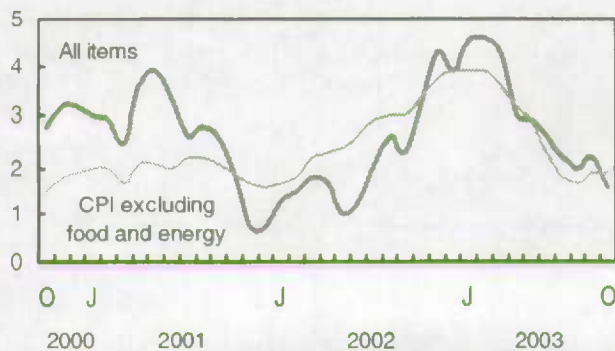
% change, previous month



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

Consumer Price Index

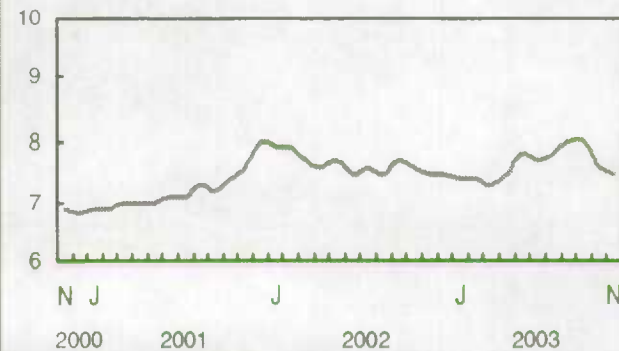
% change, previous year



Consumer prices for goods and services were 1.6% higher in October than they were a year earlier. Excluding food and energy, prices rose 1.9%.

Unemployment rate

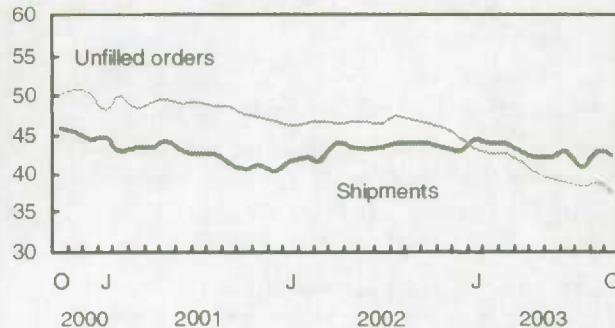
%



In November, the unemployment rate fell to 7.5%.

Manufacturing

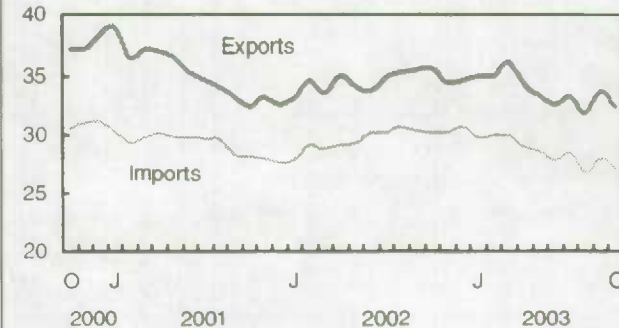
\$ billions



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

\$ billions



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	September	1,018.1	1.1%	1.9%
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)	September	26.4	-0.8%	3.3%
New motor vehicle sales (thousands of units)	October*	136.2	-2.3%	-7.5%
Wholesale trade (\$ billions)	September	36.6	6.1%	3.2%
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 (\$)	September	692.75	1.08%	1.33%
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%	-3.07%
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)	October	122.4	-0.2%	1.6%
Industrial Product Price Index (1997=100)	October	104.9	-0.9%	-3.8%
Raw Materials Price Index (1997=100)	October	108.3	1.1%	-7.8%
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.

Infomat

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Q3 2003	13-214-XDB	65/257
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INCOME STATISTICS

Detailed average household expenditure for Canada, provinces/territories and selected metropolitan areas
 Detailed average household expenditure by household income quintile for Canada and provinces
 Detailed average household expenditure by housing tenure for Canada
 Detailed average household expenditure by household type for Canada
 Detailed average household expenditure by size of area of residence for Canada
 Dwelling characteristics and household equipment for Canada, provinces/territories and selected metropolitan areas
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 Household expenditures research papers series: User guide for the Survey of Household Spending

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INTERNATIONAL TRADE

Canadian international merchandise trade
 Imports by commodity
 Imports by commodity

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LABOUR AND HOUSEHOLD SURVEYS ANALYSIS

Perspectives on Labour and Income

December 2003	75-001-XIE	6/52
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MANUFACTURING, CONSTRUCTION AND ENERGY

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 Monthly Survey of Manufacturing
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SCIENCE, INNOVATION AND ELECTRONIC INFORMATION

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TRANSPORTATION

Monthly Railway Carloadings

October 2003	52-001-XIE	9/83
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