



The Daily

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Releases

Monthly Survey of Manufacturing

August 2007

The motor vehicle industry pulled manufacturing sales lower in August, after having the opposite impact in July.

Manufacturing sales pulled back 1.7% in August, erasing the 1.3% gain from July. Sales of goods manufactured decreased to \$51.2 billion from \$52.1 billion a month earlier.

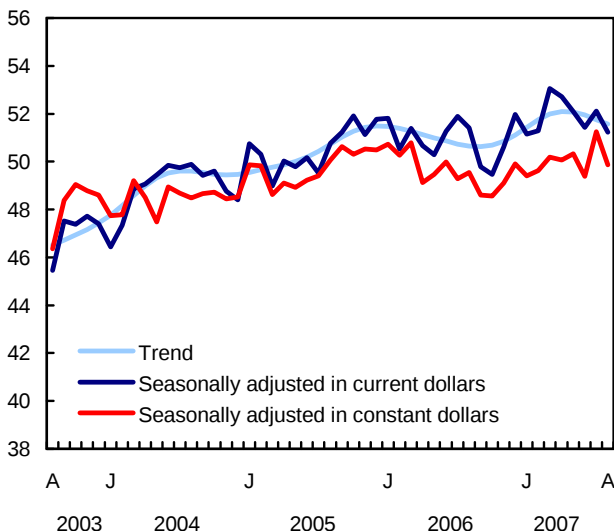
In August, as throughout most of the past 12 months, manufacturing sales continued to be heavily influenced by fluctuations in the transportation equipment industry. Excluding the motor vehicle and parts industries, sales increased 0.2% in August, the eighth increase in the past 12 months.

Using constant dollars, the volume of sales decreased 2.7% to \$49.9 billion, only the second decrease in the past six months. The decrease in constant dollar sales was the largest percentage decrease since a 3.3% drop in April 2006.

On an industry-by-industry basis, 11 of 21 manufacturing industries, representing about 56% of total sales, decreased in August.

Manufacturing sales pull back in August

\$ billions



Sales of durable goods dropped 2.8% in August. This was the fourth decrease in the past five months

Note to readers

Beginning with this release, Statistics Canada is publishing revised estimates for sales of goods manufactured (formerly referred to as "shipments"), inventories and orders obtained from the Monthly Survey of Manufacturing (MSM). Data will be revised back to March 2003 for unadjusted data, and back to January 2001 for seasonally adjusted data.

The revised estimates are based on a new sample of respondents. It is common practice for the sample to be periodically refreshed for many business survey programs, so that the sample and the target population are closely aligned and so that respondent burden is minimized.

For the MSM, the total sample size remained at about 10,500 establishments, but nearly 50% of the establishments were rotated out of the sample in order to avoid long-term respondent fatigue. Estimates derived from the refreshed sample will be linked at a detailed level in order to prevent data breaks and to ensure the continuity of the time series.

and mirrored declines in the transportation sector, which accounts for about one-third of its total. Non-durable good sales were also down in August, decreasing by 0.4% for a third consecutive monthly decline.

New orders dropped 5.0% in August after a strong July, as aerospace product and parts manufacturers reported a sharp decrease. Unfilled factory orders paused for the first time in a year, edging down 0.1% compared with July.

Motor vehicle industry at forefront of weaker sales

The transportation equipment sector as a whole was down 9.7% in August, erasing most of the 10.8% gain from the previous month. The motor vehicle industry in particular was weak as demand in the United States continued to slump.

According to the *Canadian International Merchandise Trade* report, passenger car exports were down 8.5% and motor vehicle parts exports were down 3.5% in August. The United States accounts for about 85% of the market for Canadian manufactured motor vehicles and motor vehicle parts.

Manufacturers' sales of motor vehicles tumbled 12.8% in August, and motor vehicle parts sales dropped 11.6%.

Wood product manufacturers reported a sales drop of 2.3% in August for a second month of declines. Ongoing strikes in Western Canada, in addition to falling lumber prices and slumping demand in the US, are affecting the industry.

Despite the weakness in the transportation industry in August, there were some bright spots during the month. Aerospace products and parts manufacturers reported that production increased 3.8%, recovering some of the 13.4% drop in July.

Primary metal manufacturers also reported some good news, as a two-month-long strike at a major Quebec plant was cleared up by the end of July. Sales advanced 3.5% in August to \$4.6 billion, despite a 5.2% drop in primary metal prices.

Ontario manufacturers slump in August

Manufacturing sales were evenly split at the provincial level in terms of gains and losses in August. However, a sharp decrease in Ontario sales overshadowed some strength amongst the remaining provinces. Excluding Ontario, manufacturing sales were up 1.1% in August.

Ontario reported the sharpest percentage decrease in provincial manufacturing sales, dropping 4.6% or \$1.2 billion. Overall, 15 of 21 industries in Ontario reported a decrease compared with July, led by an 11.7% drop in the transportation industry. Automotive manufacturers reported a particularly soft month, with most of the major players reporting weaker sales compared with a year earlier. Of Canada's top motor vehicle manufacturers, 9 in 10 are located in Ontario.

Saskatchewan had a strong month of sales, surging ahead 15.4% compared with July. Most of the strength in August came from a jump in primary metal manufacturing, due in part to a company takeover and expansion over the summer. Food product sales were also strong, gaining 8.2%. Grain and oilseed milling as well as dairy manufacturers reported higher sales in August.

Newfoundland and Labrador also reported improved results in August, with an increase of 12.7% after a 24.6% slump the previous month. Most of the gains were due to stronger sales of food products and petroleum and coal products compared with July.

Manufacturing sales, provinces and territories

	July 2007 ^r	August 2007 ^p	July to August 2007
Seasonally adjusted			
	\$ millions		% change
Canada	52,104	51,222	-1.7
Newfoundland and Labrador	427	482	12.7
Prince Edward Island	119	116	-2.8
Nova Scotia	825	822	-0.3
New Brunswick	1,430	1,467	2.6
Quebec	12,546	12,511	-0.3
Ontario	25,321	24,150	-4.6
Manitoba	1,402	1,392	-0.7
Saskatchewan	876	1,010	15.4
Alberta	5,552	5,630	1.4
British Columbia	3,603	3,636	0.9
Yukon	2	2	-0.4
Northwest Territories including Nunavut	2	4	99.5

^r revised

^p preliminary

Unfilled orders slow after year of strong growth

For the first time in 12 months, manufacturers' backlog of orders edged down slightly (-0.1%) to \$54.9 billion. However, unfilled orders remained 33% above levels in August 2006. Unfilled orders may be considered an indicator of future sales, assuming orders are not cancelled. The trend for unfilled orders has been steadily improving since last summer.

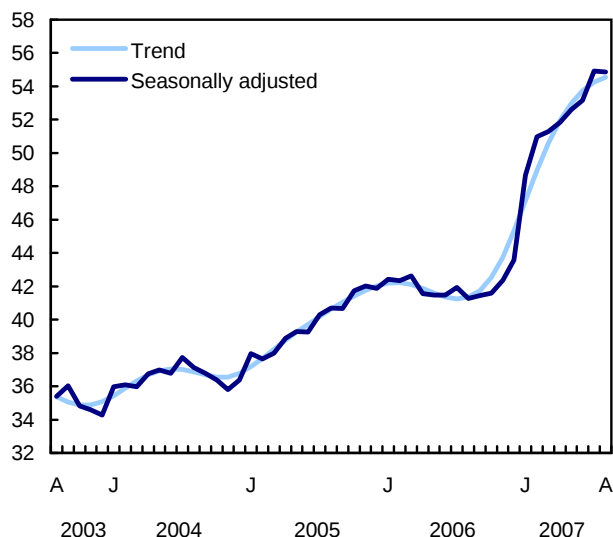
Strong demand for both defense and civilian aircraft and parts had been driving much of the strength in unfilled orders over the past 12 months. Unfilled orders in the aerospace industry have surged almost 64% in the past year. However, in August unfilled orders for aerospace products and parts remained largely unchanged (+0.3%) at \$23.4 billion.

Manufacturers in the miscellaneous group had also reported a swelling of unfilled orders, more than doubling levels in the past 12 months. However, growth of unfilled orders for miscellaneous manufacturers also slowed in August, gaining only 0.4%.

These lower than normal increases were offset by sizeable decreases in two industries. Non-metallic mineral product manufacturers reported a widely based 13.4% decrease in unfilled orders in August. Plastic and rubber product manufacturers also reported lower levels of unfilled orders, down 9.2% compared with July.

Unfilled orders slow after year of strong growth

\$ billions

**New orders fall sharply**

After a sizeable jump in July, new orders slumped in August, pulling back 5.0%. The aerospace product and parts industry, which is highly volatile due to the size and frequency of major orders, was largely responsible for the drop, tumbling 50.2% after having surged 70.3% the previous month.

Other industries reporting sizeable drops in new orders were motor vehicle parts manufacturers (-11.2%) and plastic and rubber product manufacturers (-8.8%).

Electric equipment, appliance and components manufacturers reported the largest increase in new orders, gaining 9.5% compared with July.

Inventory levels decrease slightly

In August, manufacturers' total inventories edged down 0.2% to \$66.7 billion. Inventory levels have remained flat over the past five months after decreasing slightly at the end of 2006 and the first few months of 2007. The decrease in August was largely due to a 1.0% dip in finished product inventories.

The split was fairly even in August, with 11 of 21 industries reporting a decrease to their inventories.

Wood product manufacturers reported one of the sharpest declines in inventories, dropping 3.7%

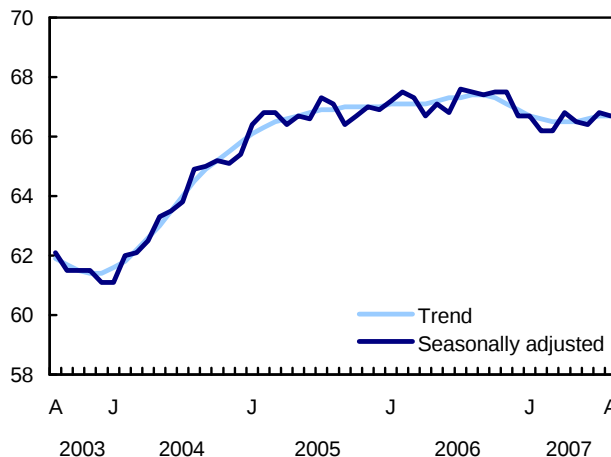
to \$4.2 billion. Inventories are being reduced in light of ongoing strikes and decreased production in the West. Wood product inventories also declined in July.

Inventories held by primary metal manufacturers also decreased in August, declining by 1.6% to \$7.2 billion. The value of inventories has been in step with price drops within the industry, as both industry prices and the reported value of inventories have dropped for four consecutive months.

Aerospace products and parts manufacturers saw one of the larger increases to inventory levels, gaining 2.2% to \$5.0 billion.

Manufacturers' inventory levels decrease slightly

\$ billions

**Inventory-to-sales ratio edges up**

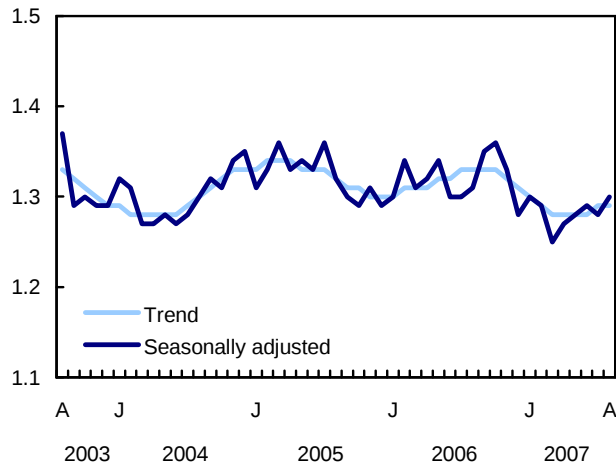
Despite a slight decline in inventory levels, the sharper drop in manufacturing sales resulted in the inventory-to-sales ratio nudging upwards in August. The inventory-to-sales ratio moved up a peg to 1.30, the highest level since January.

After a recent peak of 1.36 in October 2006, there was some tightening of inventories in the subsequent months as the ratio edged down to 1.25 by March. However, inventory levels have remained fairly stable in recent months, while manufacturing sales have trended downwards gradually since April.

The inventory-to-sales ratio is a measure of the time, in months, that would be required to exhaust inventories if sales were to remain at their current level.

Inventory-to-sales ratio widens slightly

Ratio



Available on CANSIM: tables 304-0014, 304-0015 and 377-0008.

Definitions, data sources and methods: survey number 2101.

Data from the September Monthly Survey of Manufacturing will be released on November 15.

For general information or to order data, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; fax: 613-951-9499; manufact@statcan.ca). For more information or to enquire about the concepts, methods or data quality of the release, contact Elton Cryderman (613-951-4317, elton.cryderman@statcan.ca), Manufacturing, Construction and Energy Division.

Sales, inventories and orders in all manufacturing industries

	Sales		Inventories		Unfilled orders		New orders		Inventories-to-sales ratio
	Seasonally adjusted								
	\$ millions	% change	\$ millions	% change	\$ millions	% change	\$ millions	% change	
August 2006	51,418	-0.9	67,496	-0.1	41,279	-1.6	50,752	-3.1	1.31
September 2006	49,789	-3.2	67,407	-0.1	41,439	0.4	49,949	-1.6	1.35
October 2006	49,465	-0.7	67,489	0.1	41,590	0.4	49,616	-0.7	1.36
November 2006	50,611	2.3	67,466	0.0	42,356	1.8	51,378	3.6	1.33
December 2006	51,969	2.7	66,714	-1.1	43,586	2.9	53,199	3.5	1.28
January 2007	51,142	-1.6	66,672	-0.1	48,660	11.6	56,215	5.7	1.30
February 2007	51,290	0.3	66,172	-0.7	50,987	4.8	53,617	-4.6	1.29
March 2007	53,059	3.5	66,154	0.0	51,287	0.6	53,359	-0.5	1.25
April 2007	52,703	-0.7	66,781	0.9	51,848	1.1	53,264	-0.2	1.27
May 2007	52,087	-1.2	66,533	-0.4	52,628	1.5	52,868	-0.7	1.28
June 2007	51,420	-1.3	66,393	-0.2	53,150	1.0	51,943	-1.7	1.29
July 2007	52,104	1.3	66,850	0.7	54,909	3.3	53,863	3.7	1.28
August 2007	51,222	-1.7	66,701	-0.2	54,868	-0.1	51,181	-5.0	1.30

Manufacturing industries excluding motor vehicle, parts and accessories

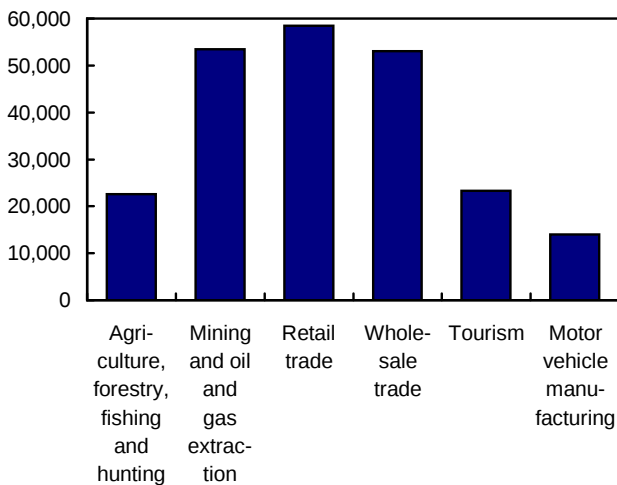
	Sales		Inventories		Unfilled orders		New orders	
	Seasonally adjusted							
	\$millions	% change	\$millions	% change	\$millions	% change	\$millions	% change
August 2006	43,750	-1.0	64,265	0.2	39,092	-1.0	43,346	-3.1
September 2006	42,509	-2.8	64,105	-0.2	39,568	1.2	42,985	-0.8
October 2006	42,511	0.0	64,202	0.2	40,124	1.4	43,067	0.2
November 2006	42,833	0.8	64,221	0.0	41,114	2.5	43,822	1.8
December 2006	43,389	1.3	63,613	-0.9	42,465	3.3	44,740	2.1
January 2007	43,462	0.2	63,565	-0.1	47,528	11.9	48,526	8.5
February 2007	43,471	0.0	63,160	-0.6	49,933	5.1	45,876	-5.5
March 2007	44,529	2.4	63,169	0.0	50,335	0.8	44,931	-2.1
April 2007	45,033	1.1	63,785	1.0	50,835	1.0	45,533	1.3
May 2007	44,658	-0.8	63,574	-0.3	51,579	1.5	45,402	-0.3
June 2007	44,519	-0.3	63,397	-0.3	52,110	1.0	45,051	-0.8
July 2007	44,140	-0.9	63,831	0.7	53,875	3.4	45,905	1.9
August 2007	44,248	0.2	63,661	-0.3	53,930	0.1	44,302	-3.5

Canadian tourism satellite account 2002

Tourism accounted for 2.2% of Canada's gross domestic product (GDP) in 2002. This matched the combined contribution of the agriculture, fishing, forestry and hunting industries, and was considerably more than the 1.3% contribution of the motor vehicle manufacturing industry.

Gross Domestic Product at basic prices, selected industries, Canada, 2002

Millions of current dollars



Tourism GDP at basic prices reached \$23.3 billion, up 4.1% (in nominal terms) from 2000. Tourism expenditures rose to \$56.6 billion in 2002, a 5.3% increase from their level in 2000.

The number of jobs in the Canadian economy increased 3.5% over this period, whereas tourism jobs lagged behind, remaining fairly steady at 611,100.

The number of international visitors to Canada was 7.7% lower in 2002 than in 2000, as a result of fewer same-day visits from the United States, as well as fewer numbers of overseas visitors. However, the number of overnight visitors from the United States was up.

Improvement in tourism trade deficit

Canadians travelling abroad in 2002 spent \$20.6 billion, down 1.6% from 2000. On the other hand, non-residents

Note to readers

The Tourism Satellite Account (TSA) has become the internationally accepted framework by which to measure tourism activity in an economy. The Canadian TSA (CTSA) follows the international guidelines adopted by the United Nations Statistical Commission and is rooted in the Canadian System of National Economic Accounts (CSNEA).

The CTSA provides a coherent framework within which to integrate and analyse economic statistics relevant to tourism, both on the supply (that is, industry) side and on the demand (tourist) side. It provides measures of the economic importance of tourism in terms of expenditures, gross domestic product (GDP) and employment, which are comparable with similar measures for the overall Canadian economy.

The CTSA also serves as the foundation for a variety of related statistical products, including the National Tourism Indicators, the Tourism Human Resource Module and studies on the government revenue that can be attributed to tourism.

The Canadian tourism satellite account is updated every two years. This release incorporates the most recently available final input-output data for the year 2002. All references to GDP are at "basic prices." All growth rates of dollar denominated series are in nominal terms.

The CTSA is funded by the Canadian Tourism Commission.

spent \$18.1 billion on tourism in Canada, a 1.7% increase from two years earlier.

This resulted in a tourism trade deficit of \$2.5 billion, an improvement from a deficit of \$3.1 billion in 2000.

While Canadian spending on tourism outside of Canada slipped between 2000 and 2002, spending on tourism at home rose 7.0% to \$38.4 billion.

As a result, Canadian spending as a share of overall tourism demand in Canada increased from 66.9% in 2000 to 68.0% in 2002.

Canadians spent less of their tourism dollar within Canada on transportation in 2002. Transportation cost them 38 cents for every dollar spent on tourism, compared with 42 cents in 2000.

Spending on air transportation down sharply

Spending on air transportation in 2002 was 7.2% below its 2000 level, while industry profits were sharply lower.

Tourism was already facing increasing demand for low-cost travel and declining demand for business travel. The terrorist attacks of September 11, 2001, further eroded the demand for international air travel and hampered the industry's performance.

Factors affecting the industry's bottom line included the introduction of the Air Travellers' Security Charge

in 2002 as well as increased security and insurance costs in the aftermath of September 11.

Tourism GDP for air transportation amounted to \$3.1 billion, down a sharp 16.1% from its level in 2000.

Travel agency services most reliant on tourism

According to the Canadian tourism satellite account, the travel agency services industry is most reliant on tourism. About 92.2% of the industry's economic activity came from tourism in 2002.

Other industries most dependent on tourism are air transportation and accommodation. Tourism accounted for 78.7% of the air transportation industry's GDP in 2002 and 66.4% of the economic activity of the accommodation industry.

Various non-tourism industries produce goods and services that are purchased by tourists, such as groceries, souvenirs and other retail goods. In 2002, tourists spent \$10.0 billion buying such items, more than was spent on accommodation. This was up 15.6% from 2000.

In 2002, these "other industries" accounted for 23.2% of tourism GDP, up from 22.5% in 2000. Tourism generated 120,800 jobs in these industries.

Canadian tourism satellite account, 2002

	Tourism gross domestic product (GDP)		
	millions of dollars	% change from 2000 to 2002	% share of total GDP
Industries			
Transportation	5,526	-7.2	0.5
Accommodation	5,708	8.8	0.5
Food and beverage services	2,898	7.7	0.3
Other tourism industries ¹	3,786	9.3	0.4
Total tourism industries	17,919	3.2	1.7
Other industries ²	5,400	6.9	0.5
Total tourism gross domestic product	23,319	4.1	2.2
Tourism employment			
	thousands of jobs	% change from 2000 to 2002	% share of total employment
Industries			
Transportation	77.9	-8.9	0.5
Accommodation	160.5	0.7	1.0
Food and beverage services	144.7	1.0	0.9
Other tourism industries ¹	107.3	4.2	0.7
Total tourism industries	490.3	-0.1	3.1
Other industries ²	120.8	1.2	0.8
Total tourism employment	611.1	0.1	3.9

1. Includes recreation and entertainment services and travel agency services.
2. Includes non-tourism industries that produce some commodities bought by tourists, including groceries, alcoholic beverages from stores, motor vehicle parts and repair, motor vehicle fuel and toiletries.

Definitions, data sources and methods: survey number 1910.

The research paper "Canadian Tourism Satellite Account, 2002," part of the *Income and Expenditure Accounts Technical Series* (13-604-MIE2007058, free), is now available from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods or data quality of this release, contact the information officer (613-951-3640; iead-info-dcrrd@statcan.ca), Income and Expenditure Accounts Division. ■

Victim services 2005/2006

About 400,000 victims of crime sought assistance from 589 victim services agencies between April 1, 2005, and March 31, 2006, according to a new report.

These agencies reported having served about 161,000 female and 48,000 male victims. The victim's sex was not provided for the remaining 190,000 victims.

Data came from the Victim Services Survey (VSS), which enumerated a total of 830 victim service agencies and 9 criminal injuries compensation programs identified as providing formal services to victims of crime. While responses were received from 697 of these agencies, some agencies did not respond to certain questions because the information was either not applicable or not available.

The VSS also captured information on the characteristics of direct and indirect victims seeking formal services on a specific snapshot day, April 19, 2006. On this day, just over 8,000 victims were served by 636 agencies.

The majority (72%) were victims of violent crime, such as sexual and physical assaults. Another 24% of clients experienced other types of incidents, such as property crimes, other criminal offences, or non-criminal incidents including suicides, drownings or motor vehicle collisions.

Over two-thirds (68%) of victims who sought assistance on the snapshot day were female, roughly the same as in 2002/2003, when the survey was last conducted.

Among female victims who had experienced a violent crime, 53% had experienced violence by a spouse, ex-spouse or intimate partner. A further 24% had been victimized by a family member other than a spouse. The remaining 23% had experienced violence at the hands of a non-family member, such as a friend, a neighbour or a stranger.

In contrast, 49% of males had been victimized by a non-family member, and 28% were victimized by a family member other than a spouse. The remaining approximate one-quarter had experienced violence at the hands of a spouse, ex-spouse or intimate partner.

A large proportion of the 697 victim service agencies were police-based (42%). Community-based organizations accounted for 19%; sexual assault centres, 17%; court-based agencies, 8%; Ontario's Victim Crisis Assistance and Referral Services, 7%; and system-based agencies, 7%. The remaining 1% comprised criminal injuries compensation programs.

Almost 8 in 10 victim service agencies used the services of nearly 9,000 volunteers between April 1, 2005 and March 31, 2006. These volunteers each worked an average of four hours per week during this period, the equivalent of 912 full-time volunteers.

The estimated cost of providing services to victims of crime, based on responses from 628 agencies, totaled \$152.2 million in 2005/2006, excluding compensation programs.

Available on CANSIM: tables 256-0018 to 256-0020.

Definitions, data sources and methods: survey number 5035.

CANSIM table 256-0021 will soon be available.

The *Juristat*: "Victim Services in Canada, 2005/2006," Vol. 27, no. 7 (85-002-XIE, free) and the publication, *Victim Services in Canada: National, Provincial and Territorial Fact Sheets, 2005/2006* (85-003-XWE, free), are now available from our website. From the *Publications* module, under *Free Internet publications*, choose *Crime and justice*, then *Juristat*. A paper version (85-002-XPE, \$11/\$100) is also available. See *How to order products*.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (toll-free 1-800-387-2231; 613-951-9023), Canadian Centre for Justice Statistics. ■

New products

Income and Expenditure Accounts Technical Series : "Canadian Tourism Satellite Account, 2002",
no. 58
Catalogue number 13-604-MIE2007058
(free).

New Motor Vehicle Sales, August 2007, Vol. 79, no. 8
Catalogue number 63-007-XWE
(free).

Juristat, Vol. 27, no. 7
Catalogue number 85-002-XIE
(free).

Juristat, Vol. 27, no. 7
Catalogue number 85-002-XPE (\$11/\$100).

Victim Services in Canada: National, Provincial and Territorial Fact Sheets, 2005/2006
Catalogue number 85-003-XWE
(free).

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

Catalogue numbers with an -XWE, -XIB or an -XIE extension are Internet versions; those with -XMB or -XME are microfiche; -XPB or -XPE are paper versions; -XDB or -XDE are electronic versions on diskette; -XCB or -XCE are electronic versions on compact disc; -XVB or -XVE are electronic versions on DVD and -XBB or -XBE a database.

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Thursday, June 5, 1997 For release at 9:30 a.m.	
MAJOR RELEASES	
Urban transit, 1995 Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took an average of about 25 trips on some form of urban transit, the lowest level in the past 25 years.	2
Productivity, hourly compensation and unit labour cost, 1995 Growth in productivity among Canadian businesses also noticeably weak again in 1996 accompanied by sluggish gains in employment and slow economic growth during the year.	4
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