



Infommat

A Weekly Review

Friday, April 4, 2003

INSIDE

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◆ **Slump in tourism spending as air travel takes brunt**

Spending on tourism slumped in Canada last year as passenger air travel continued to take a beating long after the terrorist events in New York and Washington. Foreign and domestic tourists spent a seasonally adjusted total of almost \$47.3 billion last year, down 1.1% from 2001.

◆ **Below-average gain in Canadian investment abroad**

Direct investments of Canadians abroad rose to \$431.8 billion, up 10.8% from 2001 but down from the 14.6% average over the past 10 years. This generally faster growth observed over the past 30 years was mainly due to the dynamism of Canadian businesses in foreign markets.

◆ **University enrolment soaring in technology fields**

University enrolment in fields related to technology, such as engineering and mathematics, has soared during the past three years, and the gains have been particularly prominent among women.

Autos, Mother Nature propel strong economic gain

Canada's economy started 2003 on strong footing in January, thanks to a surge in automobile manufacturing and a boost from Mother Nature. Gross domestic product (GDP) by industry, a broad measure of economic activity, grew 0.4% with a strong rebound in car production and the coldest January in nearly a decade.

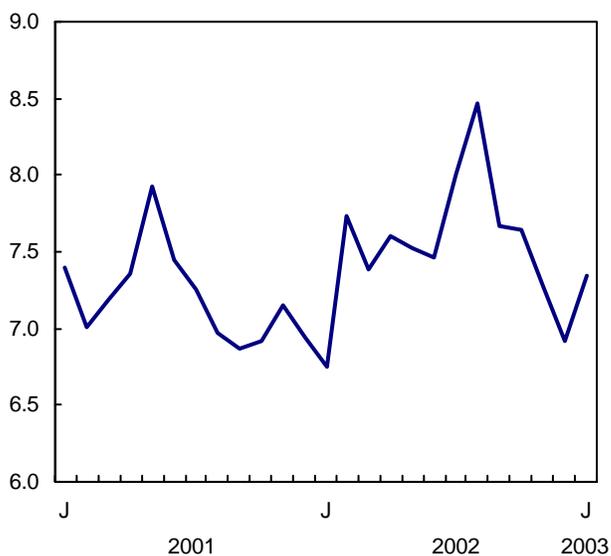
It was the strongest growth rate in GDP in six months. The surge followed no gain in December 2002 and a 0.1% increase in November.

Motor vehicle manufacturers boosted output 6.2% after a four-month retrenchment when manufacturers cut back production to cope with ballooning inventories. At the same time, production levels among parts manufacturers rose 2.8%, fuelled by the increased motor vehicle production, mostly cars.

(continued on page 2)

Motor vehicle manufacturing

GDP billions \$ chained 1997



Autos, Mother Nature... (continued from page 1)

Exports of motor vehicle parts jumped 7.1% in January. Wholesalers of motor vehicles and parts enjoyed a spectacular month as the impact of vehicle and parts production made its way through the system. Imports of vehicles and parts also surged.

Mother Nature also played a significant role in January's economic growth. The unseasonable cold boosted demand for energy products. Concerns over availability sent energy prices soaring and increased demand for drilling and rigging services.

Generation of electricity increased 2.5% in January, surpassing the peak reached during last summer's heat wave. Production of oil and gas increased 0.3%, the third consecutive monthly rise. Drilling and rigging activity continued its recent upward trend, surging a further 8.6%.

However, the cold temperatures stalled the housing boom, and kept consumers out of furniture stores and new car showrooms. New car sales plunged 14% after a 7.1% increase in December.

Activity levels at restaurants and hotels fell 0.6%. However, the entertainment sector reported a gain of 0.9%, and clothing retailers saw sales increase 4.1%. Both rail and truck transportation industries posted lower production levels.

New home construction tumbled 2.2% in January after 19 months of stunning growth during which output in the residential construction industry rose 24.8%, providing a major stimulus to the economy.

Housing starts fell 8.7% in January, the third consecutive monthly decline.

Industrial production — that is, in the mining, utilities and manufacturing sectors — rose a substantial 0.9%, after declining in the previous two months. All three components reported significant jumps in output.

Comparable US statistics on industrial production showed a 0.8% increase south of the border. However, higher output in manufacturing and utilities in the United States was offset somewhat by lower output in the mining sector.

*The January 2003 issue of **Gross domestic product by industry** (15-001-XIE, \$11/\$110) is now available. A print-on-demand version is available at a different price. For more information, contact Jo Ann MacMillan (613-951-7248; joann.macmillan@statcan.ca), Industry Measures and Analysis Division. (See also "Current trends" on page 6.)*

Number of exporters and value of exports drop in 2001

A total of 41,267 establishments exported commodities in 2001, 2% less than in 2000, but 35% more than in 1993, according to the fourth issue of the *Canadian Exporter Registry*.

The value of merchandise exports from these establishments totalled \$367 billion in 2001, down from a high of \$378 billion in 2000. Despite this decrease, total merchandise exports in 2001 were more than double the level in 1993.

Establishments exporting more than \$25 million annually continued to account for the majority of merchandise exports. In 2001, 4% of all exporting establishments accounted for 82% of the total value of merchandise exports. The 50 largest exporting enterprises accounted for almost 50% of the total.

Establishments exporting less than \$1 million annually represented 71% of all exporting establishments, yet they accounted for only 1.6% of the value of merchandise exports.

In 2001, the number of exporters in the smallest size classes (under \$1 million in annual exports) accounted for most of the drop from 2000 in the number of exporters. Conversely, the drop in the value of exports was a result of lower activity of exporters in the largest size class (over \$25 million in annual exports).

The decline in the number of exporters was concentrated in two industries: manufacturing and wholesale trade.

The decline in the value of exports was due primarily to two industries: the computer and electronic product manufacturing industry, where exports fell \$10.3 billion, and the transportation equipment manufacturing industry, where they fell \$5.3 billion. These declines were partly offset by increases in wholesale trade and transportation and warehousing.

From 1993 to 2001, manufacturing accounted for an average of 69% of merchandise exports. These exports were led by transportation equipment manufacturing, followed by wood products and paper manufacturing. The wholesale trade industry was also prominent, with 22% of all exporters accounting for 12% of merchandise exports in 2001.

For more information, contact Phil Armstrong (613-951-6755), International Trade Division.

Slump in tourism spending as air travel takes brunt

Spending on tourism slumped in Canada last year as passenger air travel continued to take a beating long after the terrorist events in New York and Washington.

Foreign and domestic tourists spent a seasonally adjusted total of almost \$47.3 billion last year, down 1.1% from 2001. The decline follows a marginal 0.2% gain in spending the year before.

Last year's decline came despite a rally in the fourth quarter in which spending increased 0.9% from the previous three months.

Passenger air transportation took the brunt of the decline in demand last year, as spending dropped 5.6% on the heels of a 2.9% decline in 2001. Travellers were apparently switching from airplane to automobile travel, as spending on fuel for vehicles was up 5.2% last year.

Canadians accounted for \$66.50 of every \$100 spent on tourism in Canada last year, up from \$66.00 in 2001. This proportion, which had been slowly declining through the 1990s, has remained stable over the last five years.

Canadians spent more than \$31.4 billion on tourism last year, down 0.4%, while foreign tourists spent just under \$15.9 billion, a 2.6% decline.

The only substantial gain occurred in the accommodation industry, where spending last year rebounded 2.2% from a 1.7% decline in 2001. A 4.3% increase in demand for accommodation among foreign travellers accounted for this reversal.

Tourism employment slowed substantially last year, advancing only 0.5% after growing 2.2% in 2001. The chief reason for the slowdown was a sharp 9.4% decline in employment in the passenger air transportation industry.

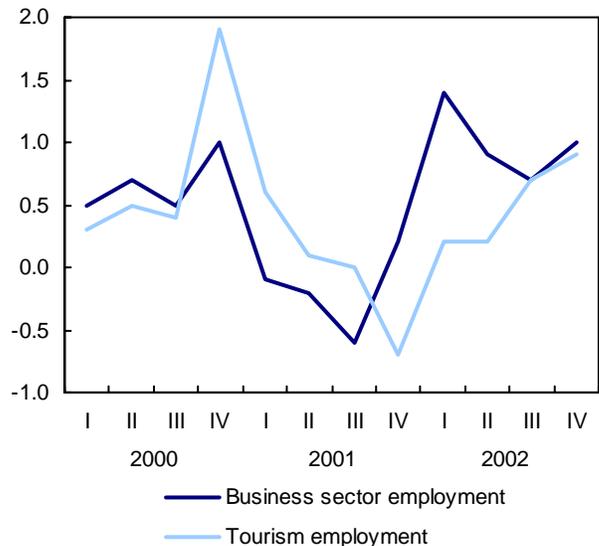
On a quarterly basis, tourism activity ended 2002 on a high note, as real spending in Canada by foreign and Canadian travellers reached almost \$11.9 billion. However, this was still 3.5% below the peak in the first quarter of 2001.

In total, foreign visitors spent just over \$4.0 billion in Canada during the last three months of the year, up 2.6%. Canadians spent about \$7.9 billion, unchanged from the previous quarter.

A strong gain in air passenger transportation was the major factor behind the growth in tourism spending in the fourth quarter.

Tourism employment

% change, previous quarter, seasonally adjusted



Domestic spending on air travel rose 1.9%, while foreign spending increased 4.5%.

International visitors flooded into Canada, with total trips advancing 5.0% (seasonally adjusted) in the fourth quarter. The number of travellers from the United States rose 4.7%, while those from other countries went up 7.9%.

With the rise in spending from abroad, Canada's international travel deficit narrowed to \$317 million in the fourth quarter from \$439 million in the third.

Employment in tourism rose 0.9% in the fourth quarter to 585,900. The air transportation industry was again the main source of growth, rising 3.8%, its third consecutive quarterly increase.

The fourth quarter 2002 issue of National tourism indicators (13-009-XIB, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact the information officer (613-951-3640), Income and Expenditure Accounts Division.

Enrolment down in trade/vocational and preparatory training

Canada's trade/vocational and preparatory training enrolments were at 234,000 in 1999/2000, down 2.5% from 1998/99. This continues a downward trend that totals 22% since 1995/96.

Enrolments in trade/vocational programs, at 149,000, accounted for 64% of overall enrolment. They were down 2.8% from 1998/99. Trade/vocational programs include pre-employment and pre-apprenticeship programs and skill upgrading courses, used to update workers in new technology occupations.

Enrolments in preparatory training programs and courses at community colleges have also decreased, totalling 85,000 in 1999/2000. These programs and courses prepare individuals for further training, rather than direct entry into the work force.

For more information, contact Karl Skof (613-951-1529; skofkar@statcan.ca), Culture, Tourism and Centre for Education Statistics.

Below-average gain in Canadian investment abroad

Direct investments of Canadians abroad rose to \$431.8 billion, up 10.8% from 2001 although down from the 14.6% average over the past 10 years.

This generally faster growth observed over the past 30 years was mainly due to the dynamism of Canadian businesses in foreign markets, and, more recently, to the depreciation of the Canadian dollar against the American dollar.

The majority of the rise in the position of foreign direct investment abroad is related to the outward movement of funds to affiliated companies for working capital purposes. In 2000 and 2001, Canadian acquisitions of foreign companies had accounted for most of the growth in the foreign direct investment.

Even though the Canadian dollar appreciated in relation to the American dollar in 2002, the depreciation in the Canadian dollar in relation to the euro played a significant part in the increase in the level of direct investment abroad last year. Variations in the Canadian dollar in relation to foreign currencies added \$6.6 billion (or 15.7% of the increase in the position between 2001 and 2002) to the foreign direct investment position of Canadians.

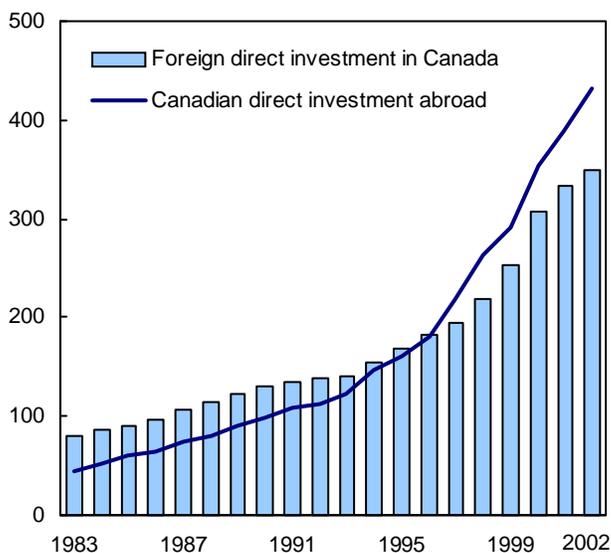
Even though the United States remained Canada's main partner in terms of the level of direct investment, its share continued to fall, reaching 46.7% (or \$201.8 billion) of total Canadian direct investment abroad. This proportion, which was down from 48.5% in 2001, meant that foreign direct investment by Canadians was more evenly distributed across foreign markets.

The level of direct investment by Canadians in European Union countries increased by \$18.5 billion to \$99.8 billion, or 23.1% of the total. The proportion of direct investment directed to all other countries represented 30.2% of the total.

Foreign direct investment in Canada rose 4.7% to \$349.4 billion. This growth was partly due to acquisitions by American interests of Canadian companies, mostly in the energy and mining sectors early in the year. Few acquisitions occurred in the second half of 2002, contributing to the slow growth rate in

Foreign direct investment position

\$ billions

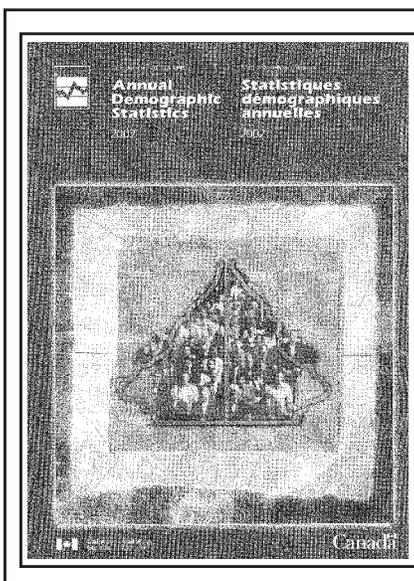


the foreign direct investment position in Canada. At the same time, capital inflows from parent companies located abroad were relatively low as the general strength of Canada's economy generated internal sources of funds.

American investors held a total of \$224.3 billion in direct investments in Canada at the end of 2002. They retained the same 64.2% share of the total foreign direct investment in Canada that they held in 2001.

The European Union saw its share of foreign direct investments change to 26.9% of the total, or \$94.0 billion. Foreign direct investment in Canada by all other countries came to only 8.9%.

For more information, contact Christian Lajule (613-951-2062) or Éric Simard (613-951-7244), Balance of Payments Division.



Annual demographic statistics

The 2002 edition of *Annual demographic statistics* provides the most recent population estimates by age group and sex, plus data on births, deaths and migrations. It groups the information by province and territory, census metropolitan area and census division, and also provides data on census families, population estimates by marital status, and marriages and divorces for the provinces and territories.

A CD-ROM included with the publication contains even more data. The historical time series includes population data back to 1971 for provinces and territories, and to 1986 for census divisions and census metropolitan areas. The CD-ROM also includes animated age pyramids, which illustrate the aging of the population.

These time series can be easily captured and manipulated to create customized demographic analyses in any spreadsheet program. The population figures can be used to calculate per capita rates for market research, quantitative analysis and planning.

Annual demographic statistics, 2002 (Internet: 91-213-XIB, \$56 without the CD-ROM; paper: 91-213-XPB, \$125 including the CD-ROM) is now available. For more information, contact Colette O'Meara (613-951-2320; colette.o'meara@statcan.ca), Demography Division.

University enrolment soaring in technology fields

University enrolment in fields related to technology, such as engineering and mathematics, has soared during the past three years, and the gains have been particularly prominent among women.

These data confirm trends found by the 2001 Census. Census education data were released in *The Daily* on March 11.

In total, 861,700 full-time and part-time students were enrolled at universities in 2000/01, up 2% from the previous academic year and up 5% from 1997/98.

About 70,600 were enrolled in engineering and applied sciences, up 10% from 1997/98, and 56,300 in mathematics and physical sciences, up 19%.

Women accounted for 23% of the enrolment in engineering and applied sciences, and 30% of the enrolment in mathematics and physical sciences.

The most popular field of study among university students, both men and women, was still social sciences, which includes commerce, economics, psychology, sociology, political science and anthropology.

A total of 261,200 students were enrolled in this discipline in 2000/01, up 4% from 1997/98. This field was also the largest single contributor to the increase in the actual number of students on university campuses since 1997/98. Social sciences accounted for 30% of total university enrolment. Six out of every 10 students in the field were women.

The number of students in social sciences was almost triple the number of students enrolled in arts and science, the second most popular field in 2000/01. Enrolment in arts and science increased 3% during the three-year period.

Only three fields of study experienced decreases: agricultural and biological sciences (-4.3%), humanities and related fields (-2.2%), and education (-0.6%).

Despite these decreases within education and humanities, they remain the third and fourth most popular fields of study. In

University enrolment by field of study

	1997/98	2000/01	1997/98 to 2000/01 % change ¹
Total²	822,800	861,700	4.7
Agricultural and biological sciences	50,200	48,000	-4.3
Arts and science	91,600	94,800	3.4
Education	88,700	88,100	-0.6
Engineering and applied sciences	64,300	70,600	9.7
Fine and applied arts	25,000	26,000	4.1
Health professions and occupations	55,600	57,800	3.9
Humanities and related fields	78,000	76,300	-2.2
Mathematics and physical sciences	47,500	56,300	18.7
Social sciences and related fields	252,000	261,200	3.7

¹ Percentages are based on actual, non-rounded figures.

² Enrolment figures may not add up because of the exclusion of the not reported and not applicable categories in the table or because of rounding.

2000/01, education accounted for 10% of total enrolment, and humanities, 9%.

Of total enrolments in 2000/01, 57% were women, their highest proportion ever. They formed the majority in all fields of study except engineering and applied sciences and mathematics and physical sciences.

Between 1997/98 and 2000/01, the number of women in mathematics and physical sciences rose 22%, compared with 17% for men. The number of women in engineering and applied sciences increased 20% during the same time frame, compared with only 7% for men.

Of the total enrolment in 2000/01, about 85%, or 735,300, were undergraduate students, and 126,300, or 15% were graduate students. From 1997/98 to 2000/01, the number of graduate students increased by 8,500, or 7%. At the same time, the number of undergrads rose by 30,300, or 4%.

For more information, contact Todd Robertson (613-951-4711; todd.robertson@statcan.ca) or Sylvie Bonhomme (613-951-5366; sylvie.bonhomme@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

Rural/urban income disparities widen

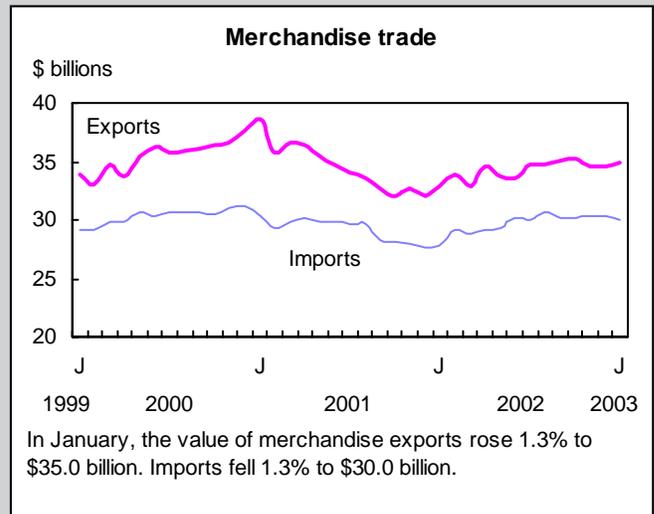
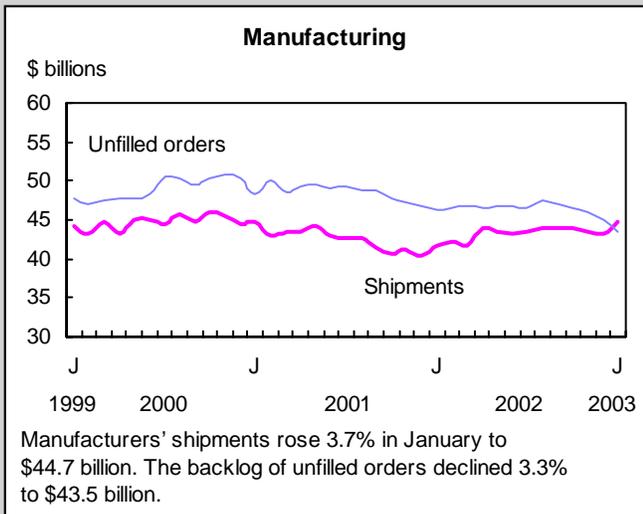
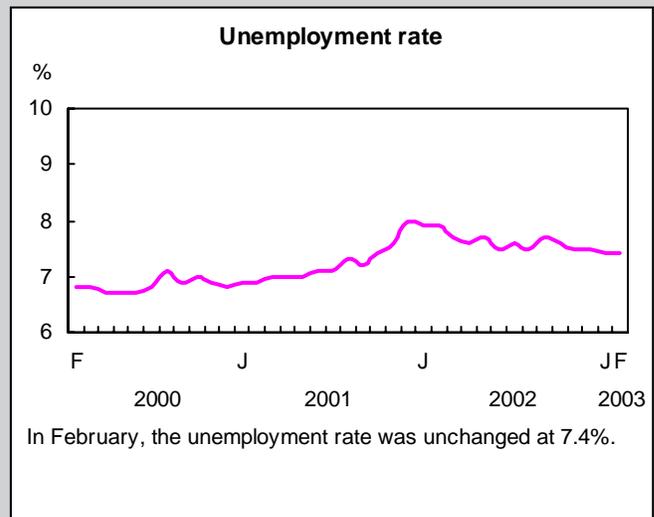
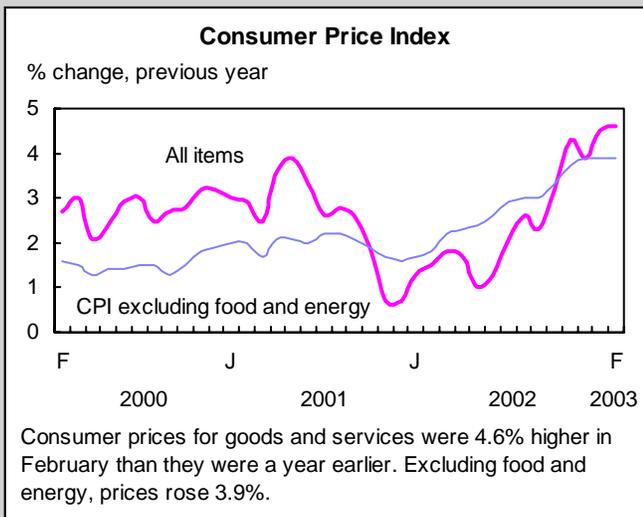
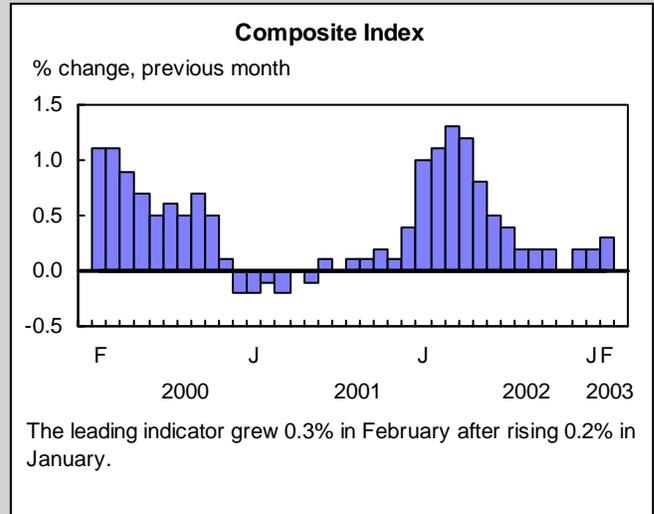
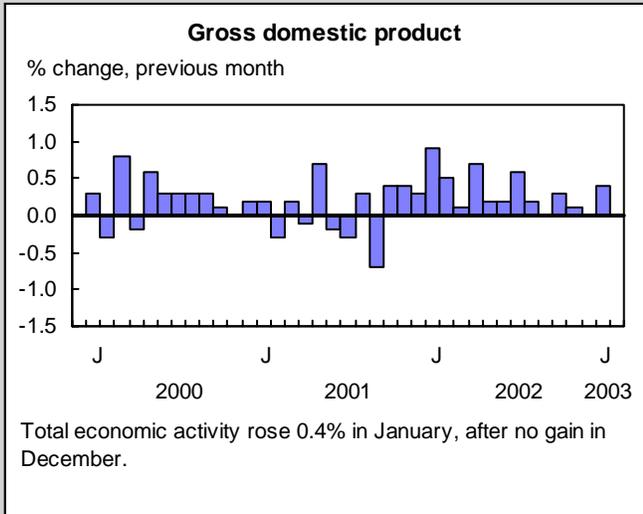
The income gap between many rural and urban areas widened, rather than narrowed, during the 1990s, according to a new study of sub-provincial income disparities in Canada.

By the end of the 1990s, census divisions with a large aggregate income had further increased their share of national aggregate income, the study found. Conversely, areas with a small aggregate income closed the decade with a relatively smaller share. In some cases, the aggregate income of these areas declined in absolute terms. Thus, Canada's total economic activity became more concentrated in large cities.

When the results were mapped, the study found clusters of persistently low-income census divisions in marginal and northern areas whose relative economic position further deteriorated through time. In contrast, clusters of rich census divisions were found in core urban regions whose relative economic position improved still more over the study period.

The rural/urban divide is not closing: Income disparities persist (21-006-XIE, free) is now available on Statistics Canada's website (www.statcan.ca). For more information, contact Alessandro Alasia (613-951-1204; alessandro.alasia@statcan.ca) or Ray D. Bollman (306-379-4431; ray.bollman@statcan.ca), Agriculture Division.

Current trends



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	January*	994.2	0.4%	3.5%
Composite Index (1992=100)	February	180.6	0.3%	5.7%
Operating profits of enterprises (\$ billions)	Q4 2002	41.9	5.1%	32.8%
Capacity utilization rate (%) ²	Q4 2002	82.9	-0.2†	2.5†
DOMESTIC DEMAND				
Retail trade (\$ billions)	January	26.0	0.7%	2.9%
New motor vehicle sales (thousands of units)	January	129.0	-14.1%	-11.8%
Wholesale trade (\$ billions)	January	36.8	1.8%	8.6%
LABOUR				
Employment (millions)	February	15.7	0.4%	3.4%
Unemployment rate (%)	February	7.4	0.0†	-0.4†
Participation rate (%)	February	67.5	0.2†	1.1†
Average weekly earnings (\$)	January	687.44	-0.08%	1.83%
Help-wanted Index (1996=100)	February	111.4	-0.2%	-11.5%
Regular Employment Insurance beneficiaries (in thousands)	January	529.7	-3.3%	-5.6%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	January	35.0	1.3%	6.3%
Merchandise imports (\$ billions)	January	30.0	-1.3%	8.0%
Merchandise trade balance (all figures in \$ billions)	January	4.9	0.8	-0.2
MANUFACTURING				
Shipments (\$ billions)	January	44.7	3.7%	6.9%
New orders (\$ billions)	January	43.2	2.9%	4.8%
Unfilled orders (\$ billions)	January	43.5	-3.3%	-5.8%
Inventory/shipments ratio	January	1.41	-0.06	-0.08
PRICES				
Consumer Price Index (1992=100)	February	122.3	0.7%	4.6%
Industrial Product Price Index (1997=100)	February	109.2	0.6%	2.3%
Raw Materials Price Index (1997=100)	February	128.9	3.1%	22.6%
New Housing Price Index (1992=100)	January	113.1	0.3%	5.1%

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

A weekly review

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Products released from March 27 to April 2, 2003

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Farm Product Price Index	January 2003	21-007-XIB	free
Rural and small town Canada analysis bulletin	1992 to 1999	21-006-XIE	free
Stocks of frozen and chilled meat products	March 2003	23-009-XIE	free
VISTA on the agri-food industry and the farm community	March 2003	21-004-XPB	free
ANALYTICAL STUDIES			
A frontier approach to Canada-US multifactor productivity performance		11F0027MIE2003010	free
Plant turnover and productivity growth in Canadian manufacturing		11F0019MIE2003193	free
DEMOGRAPHY			
Annual demographic statistics	2002	91-213-XIB	56
Annual demographic statistics	2002	91-213-XPB	125
GEOGRAPHY			
Interim list of changes to municipal boundaries, status, and names	Jan. 2001-Jan. 2003	92F0009XPB	25
Reviewing census metropolitan areas (CMA) and census agglomerations (CA) in Canada according to metropolitan functionality	2001	92F0138MIE2003001	free
Reviewing census metropolitan areas (CMA) and census agglomerations (CA) in Canada according to metropolitan functionality	2001	92F0138MPE2003001	10
HEALTH STATISTICS			
Canadian Community Health Survey profiles	2000-2001	82-576-XIE	free
Deaths — Shelf tables	2000	84F0211XPB	20
INCOME AND EXPENDITURE ACCOUNTS			
National tourism indicators, quarterly estimates	Q4 2002	13-009-XIB	free
National tourism indicators, quarterly estimates	Q4 2002	13-009-XPB	free
INTERNATIONAL TRADE			
Imports by commodity	January 2003	65-007-XMB	37/361
Imports by commodity	January 2003	65-007-XPB	78/773
MANUFACTURING, CONSTRUCTION AND ENERGY			
Asphalt roofing	February 2003	45-001-XIB	5/47
Electric power statistics	January 2003	57-001-XIB	9/85
Natural gas transportation and distribution	2001	57-205-XIB	23
Production and disposition of tobacco products	February 2003	32-022-XIB	5/47
PRICES			
Canadian International Development Agency post indexes	April 2003	62F0084XIE	free
Foreign service directives post indexes	April 2003	62F0082XIE	free
Military post indexes	April 2003	62F0085XIE	free
Post indexes for non-government organizations	April 2003	62F0083XIE	free
SCIENCE, INNOVATION AND ELECTRONIC INFORMATION			
Features of Canadian biotech innovative firms: results from the Biotechnology Use and Development Survey	2001	88F0006XIE2003005	free
Innovation is a social process	2002	88F0006XIE2003006	free
Knowledge management in practice in Canada	2001	88F0006XIE2003007	free
SERVICE INDUSTRIES			
Restaurant, caterer and tavern statistics	January 2003	63-011-XIE	6/55
TRANSPORTATION			
Aircraft movements statistics — annual	2002	51F0010PIE	free

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