



# Infommat

## A Weekly Review

Friday, August 15, 2003

### INSIDE

#### ◆ Biggest jump in tuition in 4 years

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#### ◆ Fertility rate recovers slightly from year 2000 record low

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#### ◆ Non-store retailers post modest growth in sales

Non-store retailers saw a moderate increase in the value of goods and services provided in the Canadian retailing market in 2001. Although growth was modest, eight of the 11 non-store retail major commodity groups posted increases in sales.

#### ◆ Large cities a magnet for high-tech industries

Canada's high-tech revolution is disproportionately a "big city" phenomenon. In 2000, Canada's largest cities accounted for almost 70% of employment in information and communications technology (ICT) industries.

## Loss in part-time jobs pushes up unemployment rate

Employment edged down 13,000 and the unemployment rate rose slightly from 7.7% to 7.8% in July, according to the Labour Force Survey. The employment decline was all in part-time jobs.

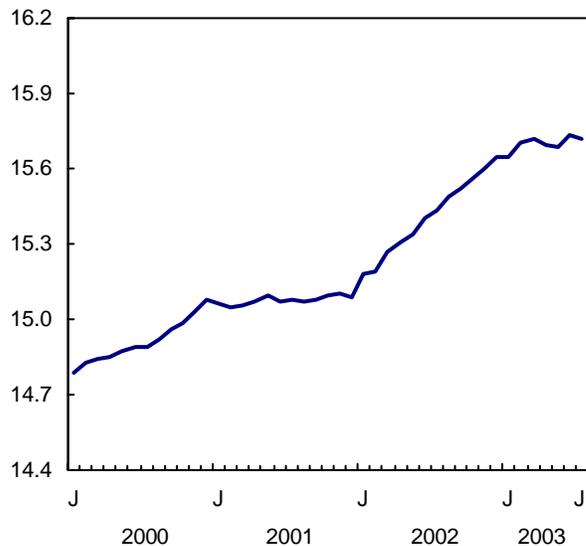
Since the start of 2003, employment has increased only 0.5%, much slower than the 2.3% growth in the first seven months of 2002. In the United States, employment continued to decline in July and is down 0.3% so far in 2003.

Employment fell by 15,000 among youths, as a decline of 31,000 part-time jobs was only partly offset by a gain in full-time. With this decrease, youth employment is down 0.4% from the start of the year. The youth unemployment rate edged up from 13.9% to 14.1% in July.

*(continued on page 2)*

### Employment

Millions, seasonally adjusted



### Loss in part-time jobs... (continued from page 1)

Among individuals aged 20- to 24, the summer job market for students improved from the previous year, in contrast to the one for 15- to 19-year-old students. Compared with July 2002, the employment rate for 20- to 24-year-old students was up from 73.8% to 75.1%. In contrast, about 51.6% of students aged 15 to 19 were employed in July, down from 52.3% in July 2002.

In July, employment among adult men edged down by 9,000 as a slight gain in part-time failed to offset a decline of 16,000 full-time jobs. Their unemployment rate rose from 6.6% to 6.8%. Since the start of 2003, overall employment among adult men has risen only 37,000, or 0.5%.

There was a slight increase of 10,000 in employment among adult women in July, bringing gains so far in 2003 to 43,000 (+0.7%). Their unemployment rate dropped from 6.3% to 6.2%.

Despite a small gain in the number of private sector employees in July (+15,000), employment for this group has shown little change over the first seven months of the year.

The number of public sector employees fell by an estimated 25,000, with most of the decline in education services. Despite this decline in July, the number of public sector employees has increased 19,000, or 0.6%, since the start of 2003.

In July, employment fell by an estimated 24,000 in education nationwide, 17,000 of which were at the primary and secondary level in Ontario. Likewise, employment decreased by 7,000 in agriculture, with half of the decline in Saskatchewan. So far in 2003, farm employment has fallen 21,000 (-5.9%), continuing a long-term downward trend.

There was also a slight employment decline of 10,000 in accommodation and food services in July, with most of the decrease in Ontario.

Employment increased by 10,000 in construction as well as in finance, insurance, real estate and leasing. Since the start of 2003, job gains total 22,000 (+2.4%) in construction and 27,000 (+3.0%) in finance, insurance, real estate and leasing.

In the provinces, employment fell in Quebec, Prince Edward Island, Nova Scotia and Ontario. In contrast, employment rose slightly in British Columbia and New Brunswick. There was little employment change in the other provinces in July.

*For more information, contact Geoff Bowlby (613-951-3325) or Vincent Ferrao (613-951-4750), Labour Statistics Division. (See also "Current Trends" on page 7.)*

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## Paths to post-secondary education among 20-year-olds

Four in 10 high school graduates delay post-secondary studies by at least one year, according to a new study. By age 20, two in 10 high school graduates have still not enrolled in a post secondary program.

In 2002, male graduates and graduates with a child were much more likely to discontinue their studies, as were graduates whose parents had not finished post-secondary studies.

Students who chose not to attend post-secondary school were also more likely to work for pay during their last year of high school than those who continued their studies directly. In addition, high school graduates who did not receive scholarships, grants or bursaries to fund their post-secondary education were more likely to delay their studies than those who did receive such funding.

*The report **Who goes to post-secondary education and when: Pathways chosen by 20-year-olds** (81-595-MIE2003006, free) is now available. For more information, contact Client Services (1-800-307-3382; 613-951-7608; educationstats@statcan.ca).*

## Biggest jump in tuition in 4 years

When Canada's undergraduate university students return to school this fall, they can expect to pay on average 7.4% more in tuition fees, the biggest increase in four years.

Undergraduate students will pay an average of \$4,025 in tuition fees for the 2003/04 academic year, up from \$3,749 in 2002/03. This is more than double the average of \$1,464 in 1990/91, the result of substantial increases during the 1990s.

Although the rate of increase has been slower in the last three years than during the 1990s, average tuition fees continue to rise faster than inflation.

From 1990/91 to 1999/2000, undergraduate tuition fees rose by an average of 9.6% per year. However, beginning this decade, the rate of increase of tuition fees has slowed to an annual average of 4.9%.

For the second consecutive year, British Columbia will post the largest increase in average undergraduate fees, up 30.4% on the heels of last year's 25.7% rise. In 2003/04, undergraduate university students in British Columbia will pay an average of \$4,140, surpassing the national average for the first time in eight years.

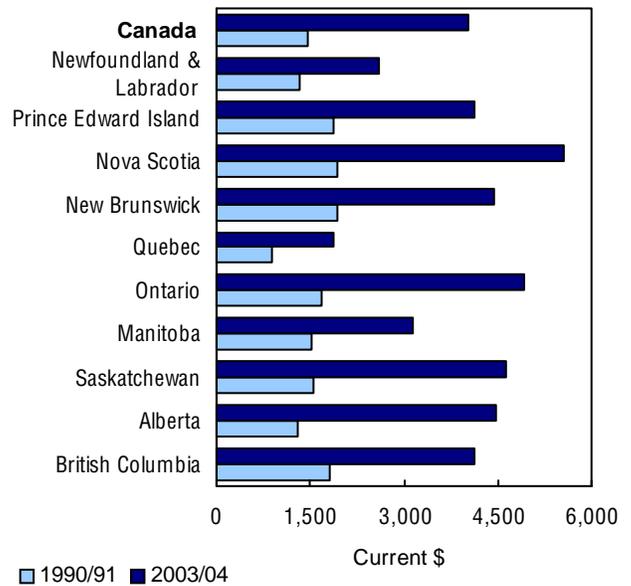
Newfoundland and Labrador is the only province in which tuition fees will decline for 2003/04. Average undergraduate tuition fees in the province will drop 4.5% to \$2,606, following a 10.0% drop during each of the previous two years.

Average undergraduate tuition fees for 2003/04 remain highest in Nova Scotia at \$5,557, followed by Ontario at \$4,923.

Fees will be frozen for the seventh straight year at \$1,675 for residents of Quebec attending universities in Quebec, the lowest level in the country. However, students from other provinces attending universities in Quebec will have to pay \$4,300 on average, up 2.9%.

The biggest increases in tuition fees this fall will occur for students in dentistry, law and medicine. The highest fees will be paid by dentistry students in Saskatchewan (\$30,178) and in Ontario (\$17,087), followed by medical students (\$9,406 on average) and law students (\$5,995 on average). In addition, tuition for engineering will increase 13.1% on average to \$4,371.

Average undergraduate tuition fees by province



Canadian students in graduate programs are facing increases similar to the undergraduate level, with average tuition rising 6.8% to \$5,199, the smallest increase since 1994/95.

Graduate students in Ontario will still pay the highest fees in the country (\$8,376), followed by those in Nova Scotia (\$6,898). Graduate fees remain lowest in Quebec, where they will be frozen for Quebec residents for the sixth consecutive year.

International students also face increases in tuition. At the undergraduate level, average tuition fees for international students will increase 7.5% to \$11,256. Graduate tuition fees will increase 6.3% to \$10,775 on average.

Likewise, additional compulsory fees, which typically include fees for recreation and athletics, student health services and student association fees, will rise 9.0% to an average of \$623 for undergraduate students.

*For more information, contact Holly Shum (613-951-7556; holly.shum@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

## Fertility rate recovers slightly from year 2000 record low

Live births increased for the first time in a decade in 2001. As a result, Canada's fertility rate recovered slightly from the record low set the year before.

In total, 333,744 babies were born in 2001, up 1.8% from 2000. The fertility rate — an estimate of the average number of children women aged 15 to 49 will have in their lifetime — rose to 1.51 in 2001 from the record low of 1.49 set in 2000.

Live births rose in only four provinces: Ontario, Quebec, Saskatchewan and Alberta. Just over 131,700 babies were born in Ontario, up 3.4% from 2000 and the strongest increase. Almost 73,700 were born in Quebec, up 2.3%.

It is impossible to determine from the data source (birth registrations) the reasons behind the increase in births. However, the growth coincides with the extension of parental benefits under Employment Insurance from a maximum of 10 weeks to 35 weeks as of December 31, 2000. The availability of this benefit may have encouraged some Canadians to start or add to their families.

The fertility rate of teenagers set a new low in 2001, with 16.3 births for every 1,000 women aged 15 to 19 in 2001. This continued a trend of annual declines which began in 1992.

In contrast, fertility rates for women aged 25 to 29 rose for the first time in a decade to 97.9 births for every 1,000 women this age.

Additional information on stillbirths has also been released. The number of stillbirths with a gestational age of 28 weeks or more, known as late fetal deaths, rose slightly in 2001 for the third straight year.

Canada registered 1,097 stillbirths at 28 weeks or more in 2001, up 3.5% from 2000.

### Births<sup>1</sup>

	2000	2001	2000 to 2001 % change
<b>Canada<sup>2</sup></b>	<b>327,882</b>	<b>333,744</b>	<b>1.8</b>
Newfoundland and Labrador	4,869	4,716	-3.1
Prince Edward Island	1,441	1,380	-4.2
Nova Scotia	9,116	8,909	-2.3
New Brunswick	7,347	7,195	-2.1
Quebec	72,007	73,695	2.3
Ontario	127,408	131,709	3.4
Manitoba	14,090	14,002	-0.6
Saskatchewan	12,140	12,275	1.1
Alberta	37,006	37,619	1.7
British Columbia	40,672	40,575	-0.2
Yukon	370	344	-7.0
Northwest Territories <sup>3</sup>	673	613	-8.9
Nunavut <sup>3</sup>	727	710	-2.3

<sup>1</sup> Excludes births to non-residents of Canada and stillbirths.

<sup>2</sup> Canada total includes births with unknown province or territory of residence of mother.

<sup>3</sup> Data for Nunavut are excluded from the Northwest Territories.

In 2001, there were 3.3 late fetal deaths for every 1,000 total births (live births plus stillbirths of 28 weeks or longer gestation). This was a slight increase from 2000, when there were 3.2 such deaths for every 1,000 total births.

Late fetal death rates have remained below four deaths for every 1,000 total births since 1990.

*The publication Births — Shelftables, 2001 (84F0210XPB, \$20) is now available. For more information, contact Patricia Tully (613-951-1759; patricia.tully@statcan.ca) or Leslie Geran (613-951-5243; leslie.geran@statcan.ca), Health Statistics Division.*

## Radio listening

Public radio posted steady growth in listeners over the past five years, rising from sixth place to third among Canadians' listening choices in the fall of 2002. At the same time, the gap in listening time continued to widen between teenagers aged 12 to 17 and adults aged 18 and over.

English- and French-language Canadian Broadcasting Corporation stations rose from 9.5% of audience share in 1998 to nearly 11% in 2002, taking third place overall. This spot was the longtime domain of country music, until it was pushed out by talk radio in 2001.

Public radio gained listeners from both younger and older age groups. An aging population and an increasing number of people with a postsecondary education are among the reasons for public radio's gain in listeners. Attraction to public radio appears to increase with level of education.

*For more information, contact Lotfi Chahdi (613-951-3136; lotfi.chahdi@statcan.ca), Culture, Tourism and the Centre for Education Statistics.*

## Non-store retailers post modest growth in sales

In 2001, non-store retailers saw a moderate increase in the value of goods and services provided in the Canadian retailing market. However, their share of the market as a whole remained about the same as the previous year.

Non-store retailers sell their products and services by means other than fixed point-of-sale locations. They reach consumers through a variety of methods, including broadcasting of infomercials, traditional and electronic catalogues, door-to-door sales, in-house demonstration and distribution by vending machines. This sub-sector also includes establishments delivering products such as heating oil or newspapers to homes.

To date, this retail format has made only modest inroads into the Canadian retailing market. In 2001, non-store retailers accounted for 3% of all Canadian retailing and provided \$10.5 billion in goods and services, a 2.9% increase over 2000.

Fuel dealers accounted for nearly half (45%) of total non-store retail operating revenues in 2001. Electronic shopping and mail-order houses held the second largest market share at 33%, followed by direct selling establishments at 15%. Vending machines and coffee service operators had the lowest market share at just 7%.

Operating revenues rose in all provinces and territories in 2001. The Yukon, Northwest Territories and Nunavut combined posted the largest increase of 19.6%, followed by Manitoba at 14.6% and Prince Edward Island at 8.8%. Two provinces posted gains below the national average: Ontario at 0.6% and Newfoundland and Labrador at 2.2%.

Gross margins declined just slightly from 38.8% in 2000 to 38.5% in 2001 for non-store retailers. Vending machine and coffee service operators had the highest gross margin at 52.5%, while fuel dealers recorded the lowest at 25.4%. (Gross margin is measured by subtracting cost of goods sold from total operating revenues.)

Despite the high gross margin, vending machine and coffee

### Non-store retail by industry

	Operating revenues 2001	Gross margin 2001	Operating profit 2001	Operating revenues 2001	Operating revenues 2001
	(\$ 000)			% change	% share
<b>Total</b>	<b>10,456,730</b>	<b>4,030,751</b>	<b>654,965</b>	<b>2.9</b>	<b>100.0</b>
Electronic shopping and mail-order houses	3,490,773	1,664,909	217,660	-0.5	33.4
Vending machine and coffee service operators	706,017	370,787	82	4.0	6.8
Fuel dealers	4,673,949	1,188,585	336,871	5.1	44.7
Direct selling businesses	1,585,991	806,471	100,352	3.8	15.2

service operators recorded virtually no operating profit in 2001, mainly due to the installation of new machines and reprogramming of existing machines to accept the introduction of new coins. In contrast, the other three industry groups registered strong increases in operating profits.

Although growth was modest in 2001, eight of the 11 non-store retail major commodity groups posted increases in sales. Hardware, home renovation and lawn and garden products saw the largest increase in sales (22.0%), followed by food and beverages (18.5%) and revenue from services (16.0%).

On the other hand, clothing, footwear and accessories recorded the largest decline at 10.2%. Home furnishings and electronics were down 6.0%, and those in the "other goods" category dropped 3%.

Household fuels and automotive fuels, oils and additives combined accounted for 41.6% of total commodities sold by non-store retailers in 2001. Within non-store retail, the share held by each of the 11 commodity groups remained virtually unchanged from 2000.

*For more information, contact Serge Gervais (613-951-9218; serge.gervais@statcan.ca), Distributive Trades Division.*

### Book publishers and exclusive agents

The book industry saw substantial growth in 2000/01, with increases in revenues, sales and the number of new titles issued. Book publishers and exclusive agents recorded revenues of more than \$2.4 billion in this period.

The 672 firms active in Canadian book publishing recorded revenues of more than \$2.4 billion in the 2000/01 fiscal year, up 9.4% from the previous survey results in 1998/99 and a 20.0% increase from 1996/97.

Many new titles entered the Canadian marketplace in 2000/01. Book publishers produced 15,744 new titles and reprinted 12,053 existing titles, an increase of over 13% from 1998/99 and over 47% from 1996/97. However, while foreign-controlled firms represented 4% of the 672 companies, they accounted for 46% of total book sales that year.

*For more information, contact Client Services (1-800-307-3382; cult.tourstats@statcan.ca).*

## Large cities a magnet for high-tech industries

Canada's high-tech revolution is disproportionately a "big city" phenomenon, according to a new study. During the 1990s, information and technology industries (ICT) industries accounted for four out of every 10 new jobs in Canada's largest cities.

Employment growth in Canada was fuelled by job gains in the technology sector. One out of every six jobs created during the decade was in the ICT sector.

In 1990, Canada's largest cities (over a million people), were home to about 63% of Canada's ICT workforce. ICT employment growth in these cities was rapid. By 2000, the largest cities accounted for almost 70% of ICT employment.

In contrast, the share of total employment in these largest centres stood at just under 45% in 1990 and 43% in 2000.

Not only were large cities a magnet for firms in the ICT sector, but these companies were an important source of employment creation in large centres. Cities with more diverse economies provided ICT industries with the wide variety of services and specialised labour they required for growth, in turn generating employment for local businesses.

During the 1990s, Ottawa cemented its position as a high-tech city. However, Toronto was the true employment centre for firms in ICT industries.

In 2000, Ottawa led all other Canadian cities in terms of the percentage of its local workforce employed in the ICT sector.

However, Toronto's ICT workforce was four times the size of Ottawa's, and Toronto experienced faster ICT employment growth over the course of the decade.

ICT industries accounted for 9% of Ottawa's employed labour force in 2000, the largest share of all of Canada's urban centres. Yet, in absolute terms Toronto's ICT sector was much larger. Toronto was home to about 200,000 ICT workers, compared to just under 50,000 in Ottawa.

Montréal had the second largest ICT workforce in Canada. However, at just under 90,000 workers, its local ICT sector was less than half the size of Toronto's.

ICT industries were not the only source of industrial innovation. Science-based industries also contributed to economic growth via large investments in research and development and skilled workers.

This science group takes in a diverse range of production environments, from heavy manufacturing industries such as aircraft manufacturing, industrial chemicals and pharmaceuticals, to professional services such as architecture and engineering.

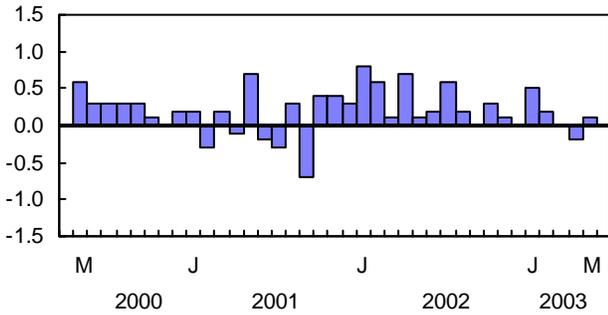
Calgary and Montréal enjoyed the largest employment gains in science industries. Between 1990 and 2000, Calgary increased the size of its science-based workforce by 18,000 workers, while Montréal's science sector grew by about 12,000 workers.

*The research paper **A decade of growth: The emerging geography of new economy industries in the 1990s** (11-622-MIE2003003, free) is now available. For more information, contact Mark Brown (613-951-7292) or Guy Gellatly (613-951-3758), Micro-economic Analysis Division.*

## Current trends

### Gross domestic product

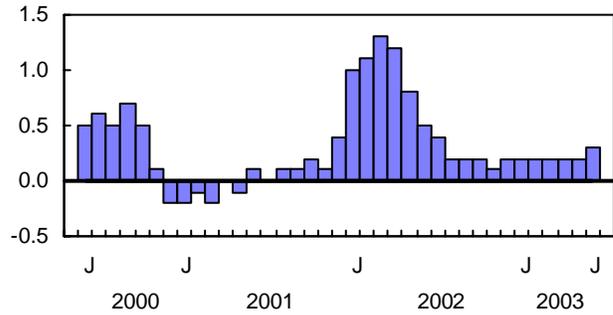
% change, previous month



Total economic activity rose 0.1% in May, after dropping 0.2% in April.

### Composite Index

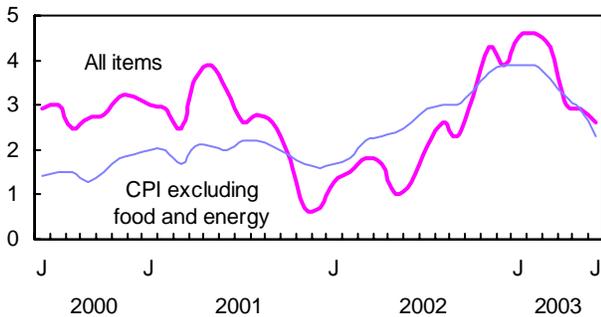
% change, previous month



The leading indicator grew 0.3% in June after rising 0.2% in May.

### Consumer Price Index

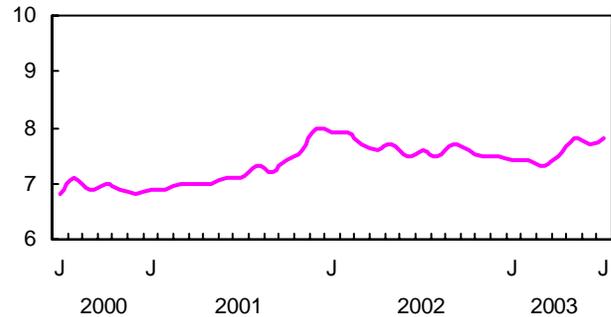
% change, previous year



Consumer prices for goods and services were 2.6% higher in June than they were a year earlier. Excluding food and energy, prices also rose 2.3%.

### Unemployment rate

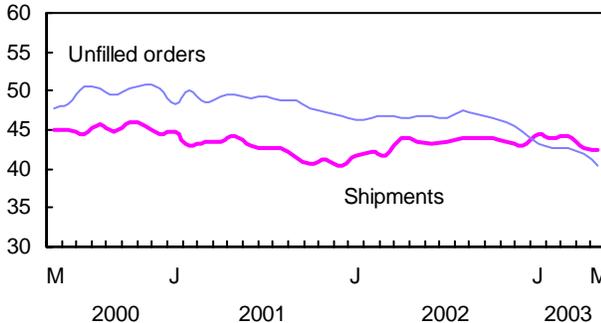
%



In June, the unemployment rate rose 0.1 percentage points to 7.8%.

### Manufacturing

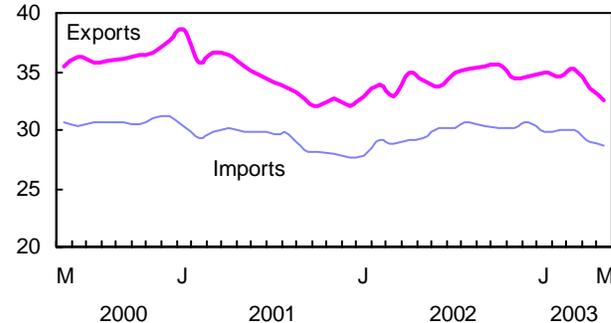
\$ billions



Manufacturers' shipments fell 0.8% in May to \$42.4 billion. The backlog of unfilled orders declined 3.4% to \$40.5 billion.

### Merchandise trade

\$ billions



In May, the value of merchandise exports dropped 2.8% to \$32.6 billion. Imports fell 1.1% to \$28.6 billion.

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

## Latest statistics

	Period	Level	Change, previous period	Change, previous year
<b>GENERAL</b>				
Gross domestic product (\$ billions, 1997) <sup>1</sup>	May	992.5	0.1%	1.8%
Composite Index (1992=100)	June	181.5	0.3%	2.3%
Operating profits of enterprises (\$ billions)	Q1 2003	42.9	10.6%	26.6%
Capacity utilization rate (%) <sup>2</sup>	Q1 2003	82.8	0.3†	1.2†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billions)	May	26.2	0.3%	4.0%
New motor vehicle sales (thousands of units)	June*	130.0	-10.2%	-8.9%
Wholesale trade (\$ billions)	May	35.9	0.2%	3.7%
<b>LABOUR</b>				
Employment (millions)	July*	15.7	-0.1%	1.9%
Unemployment rate (%)	July*	7.8	0.1	0.2†
Participation rate (%)	July*	67.5	0.0†	0.6†
Average weekly earnings (\$)	May	691.38	0.7%	1.8%
Regular Employment Insurance beneficiaries (in thousands)	May	561.4	2.7%	0.3%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billions)	June*	31.6	-3.8%	-6.5%
Merchandise imports (\$ billions)	June*	28.0	-2.2%	-7.0%
Merchandise trade balance (all figures in \$ billions)	June*	3.6	-0.4	-0.1
<b>MANUFACTURING</b>				
Shipments (\$ billions)	May	42.4	-0.8%	-2.2%
New orders (\$ billions)	May	41.0	-2.5%	-5.7%
Unfilled orders (\$ billions)	May	40.5	-3.4%	-13.3%
Inventory/shipments ratio	May	1.49	0.00	0.07
<b>PRICES</b>				
Consumer Price Index (1992=100)	June	122.1	0.1%	2.6%
Industrial Product Price Index (1997=100)	June	103.9	-1.0%	-2.7%
Raw Materials Price Index (1997=100)	June	114.3	1.2%	3.2%
New Housing Price Index (1992=100)	June*	116.3	0.3%	4.5%

*Note:* All series are seasonally adjusted with the exception of the price indexes.

\* new this week

† percentage point

<sup>1</sup> 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.

<sup>2</sup> 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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SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
<b>AGRICULTURE</b>			
Production of eggs	June 2003	23-003-XIB	free
Whole farm database reference manual	2003	21F0005GPE	free
Whole farm database reference manual	2003	21F0005GIE	free
<b>ANALYTICAL STUDIES</b>			
Analytical Studies Branch research paper series: Learning from failure — Organizational mortality and the resource-based view, no. 202		11F0019MIE2003202	free
<b>BALANCE OF PAYMENTS AND FINANCIAL FLOWS</b>			
Canada's balance of international payments	Q1 2003	67-001-XIB	29/93
<b>HEALTH STATISTICS</b>			
Births — Shelf tables	2001	84F0210XPB	20
Health reports	August 2003	82-003-XIE	15/44
Health reports	August 2003	82-003-XPE	20/58
<b>INVESTMENT AND CAPITAL STOCK</b>			
Building permits	June 2003	64-001-XIE	14/145
<b>LABOUR STATISTICS</b>			
Employment, earnings and hours	May 2003	72-002-XIB	24/240
Labour force information	July 12 to 19, 2003	71-001-XIE	8/78
<b>PRICES</b>			
Industry price indexes	June 2003	62-011-XIE	17/163

Catalogue numbers with an -XIB or an -XIE extension are Internet versions (B signifies bilingual, E signifies English); those with -XMB or -XME are microfiche; and -XPB or -XPE denote the paper version. XDB means the electronic version on diskette, while -XCB denotes a compact disc.

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