



Infomat

A Weekly Review

Friday, November 21, 2003

INSIDE

◆ **Spotlight: Impaired driving**

Today's *Spotlight* is on trends in impaired driving. A new *Juristat* from the Canadian Centre for Justice Statistics shows that the national rate of impaired driving resumed its 20-year downward trend last year after a small increase in 2001. Young drivers aged 19 to 24 continue to have the highest rates for impaired driving.

◆ **Dismal third quarter for manufacturers**

Canadian factories geared up production in September following the power blackout in August in Ontario and the northeastern United States. But despite September's rebound, manufacturers were left with dismal results for the third quarter.

◆ **Trade surplus widens for third consecutive month**

Canada's merchandise trade with the world rebounded in September, recovering most of the declines experienced the month before when the power blackout crippled Ontario and the northeastern United States.

◆ **Homeowners spend record high on renovations, repairs**

Homeowners spent more than ever last year on repairing and renovating their homes, spurred by factors such as low interest rates and higher disposable incomes. On average, homeowners spent \$2,910 repairing or renovating their homes in 2002, about 9% more than they did in 2001.

Tumbling energy prices ease rate of inflation

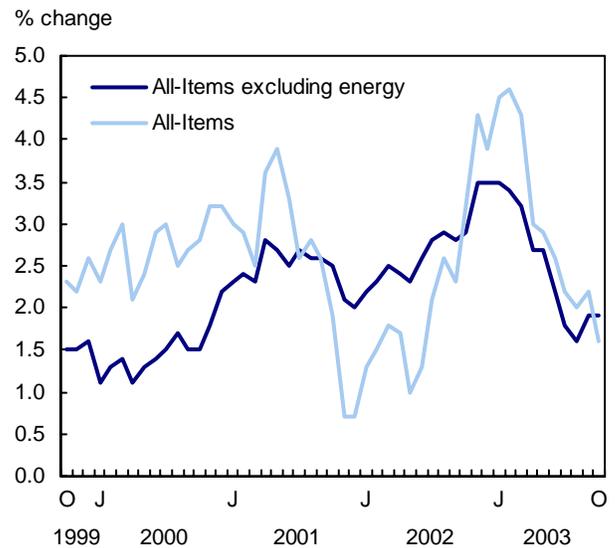
Canada's rate of inflation as measured by the Consumer Price Index fell to 1.6% in October, its lowest level in well over a year. This year-over-year increase was a substantial slowdown from the rate of 2.2% in September, and was the smallest since June 2002 when it was only 1.3%.

The slowdown was due entirely to tumbling energy prices. The cost of energy halted a year of growth in October, when prices were 1.0% below their level in the same month last year.

If energy had been excluded from the CPI, the 12-month change in October would have been 1.9%, which was the same increase as in September.

(continued on page 2)

Smallest 12-month increase in CPI since June 2002



Tumbling energy prices... *(continued from page 1)*

The CPI excluding the eight most volatile components as defined by the Bank of Canada rose 1.8% from October 2002 to October 2003, only a slight increase from the 12-month advance of 1.7% in September. It was the fourth consecutive month in which this "core rate" was below the 2.0% mark.

October's drop in energy prices resulted from a 5.6% decline in electricity prices, a 3.2% decline in gasoline prices and an 8.0% drop in fuel oil prices. Partially offsetting declines these was a 15.6% jump in natural gas prices.

Other contributing factors to the increase in October's CPI included automotive vehicle insurance premiums, natural gas, tuition fees, homeowner replacement costs, homeowner insurance premiums and restaurant meals.

Factors exerting some downward pressure included lower prices for automotive vehicles, electricity, gasoline, clothing and traveller accommodation.

Automotive vehicle insurance premiums increased on average 18.9% from October 2002 to October 2003, while premiums for homeowner insurance were up 13.9%. Tuition fees, represented by university fees, rose 8.1%.

Homeowners' replacement cost was up 6.6%. This is a measure of the depreciation of a house and is estimated by changes in the price of new housing, excluding land.

Automotive vehicle prices were 2.9% lower than in October a year ago. The index for the purchase of automotive vehicles, which reflects only pure price variations and not price variations associated with quality changes, was at its lowest level since October 1996.

On a monthly basis, the CPI fell 0.2% from September, mostly due to substantial price declines for gasoline and natural gas. This halted the slow-moving upward trend of the index during the previous five months.

Energy prices fell 4.5% from September, mostly because of strong price declines for gasoline (-6.6%) and natural gas (-8.3%). Fuel oil prices fell 3.8%, while electricity prices rose slightly.

In addition, lower prices for traveller accommodation and automotive vehicles exerted downward pressure on the monthly all-items CPI. Upward pressure came from price increases for property taxes and beef, as well as homeowners' maintenance and repairs.

Beef prices advanced 4.7% from September, after five consecutive months of declines. Increased demand in July and August, combined with the partial resumption of exports to Mexico and the United States, reduced the oversupply created by the case of mad cow disease in Alberta in May 2003. This oversupply pushed prices up.

For more information, call Rebecca McDougall (1-866-230-2248), Prices Division.

Second consecutive decline in new motor vehicle sales

Despite ongoing incentive programs, car dealers still had problems luring consumers into showrooms in September. The number of new motor vehicles sold fell for a second consecutive month.

In total, dealers sold 140,539 vehicles in September, a 1.9% decline, which was the second smallest monthly change since the beginning of the year. Sales of both passenger cars and trucks fell, but the drop was bigger for cars.

On a year-to-date basis, sales for the first nine months of 2003 were 3.7% below the same nine-month period last year. Sales were more sluggish in the first part of the year, and the gap started to narrow in August.

Dealers sold 72,017 new passenger cars in September, a 3.4% decline, following a rise of 0.3% in August. North American-built cars and overseas-built cars both contributed to the drop.

In the third quarter, new motor vehicle sales rose 5.5% from the second quarter, when they were down 1.1%. However, third-quarter sales slipped 0.5% from the third quarter of 2002.

These third-quarter figures also show that trucks increased their market share, which reached 48.5% in the third quarter, compared with 46.5% in the second quarter and 44.9% in the first.

In September, the number of new motor vehicles sold was down in all provinces except Ontario.

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

SPOTLIGHT: Impaired driving

Impaired driving rate resumes long-term decline

The national rate of impaired driving resumed its 20-year downward trend last year after a small increase in 2001, according to a new police-reported data.

Police reported about 81,000 incidents of impaired driving, or a rate of 321 incidents for every 100,000 people aged 16 and over. This rate was down 4% from 2001, and was 65% below the peak in 1981.

These incidents include road-side suspensions, used in cases where a driver's blood-alcohol content was slightly over the legal limit.

Of these incidents, police charged about 67,000 drivers with impaired driving in 2002. This number was equivalent to a rate of 265 drivers for every 100,000 people aged 16 and over, which was a 5% decline from the year before.

Between 1992 and 2002, the rate of people charged with impaired driving has declined 45%.

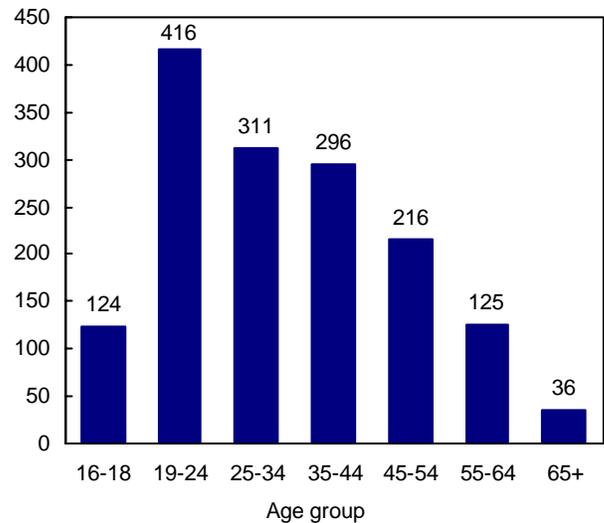
While most indicators point to a real decline in impaired driving incidents, some of the decrease in charges may be due to the increased use of discretionary procedures used by police, such as road-side suspensions.

The decline may also be due to a variety of other factors, including changing attitudes and behaviours with respect to impaired driving, the aging population and the level of police enforcement activity.

Nearly all provinces reported declines in 2002 in both the number and rate of people charged with impaired driving. The single exception was Quebec, where the rate remained relatively stable. Among the provinces, Saskatchewan had the highest rate of impaired driving, while Newfoundland and Labrador had the lowest.

Rates of impaired driving highest among young drivers

Rate per 100,000 population



Of the more than 452,000 cases heard in court in 2001/02, nearly 53,000, or about 12%, involved impaired driving offences. This was the largest offence category and compares to 11% for common assault and 9% for theft.

Just under three-quarters of cases involving impaired driving resulted in a conviction, somewhat higher than 60% for all Criminal Code offences.

You can read *Juristat: Impaired driving and other traffic offences, 2002*, Vol. 23, no. 9 (85-002-XIE2003009) on Statistics Canada's website (www.statcan.ca).

For more information, contact Information and Client Services (613-951-9023), Canadian Centre for Justice Statistics.

Rates peak among 21-year-old males

The typical individual charged with impaired driving in Canada is a 21-year-old male, according to police-reported data.

Data available from 94 police departments in nine provinces, representing 56% of all reported criminal incidents show that young drivers aged 19 to 24 continue to have the highest rates for impaired driving.

Rates peak at age 21, then level off and remain relatively constant among people aged 25 to 44. Seniors aged 65 years and older had the lowest rates.

In 2002, the vast majority (87%) of people charged with impaired driving were men. However, the proportion of women charged has steadily increased from 8% in 1986 to 13% in 2002.

Impaired driving was a factor in almost half (47%) of all incidents causing death in 2002.

Drinking and lifestyle patterns may explain higher rates of impaired driving among young adults. According to the Canadian Community Health Survey, people aged between 20 and 24 report the highest rates of "regular heavy drinking", defined as drinking five or more drinks on one occasion at least 12 times in the previous 12 months.

Dismal third quarter for manufacturers

Canadian factories geared up production in September following the power blackout in August in Ontario and the northeastern United States. But despite September's rebound, manufacturers were left with dismal results for the third quarter.

In September, manufacturers' shipments soared 5.2% to \$43.0 billion, the highest level since March. However, for the third quarter as a whole, shipments fell 0.4%, on the heels of a 3.9% decline between April and June.

Gains in September were broadly based, as 17 of 21 manufacturing industries, representing 84% of total shipments, reported higher production.

Shipments of motor vehicles rose 16.2%, chemicals 9.5%, computers 17.0% and auto parts 7.1%. Manufacturers of motor vehicles recovered only about two-thirds of the shipments they lost in August.

Ontario's rebound of \$1.8 billion from the blackout led the nine provinces that reported gains in September. Even excluding Ontario's significant impact on the national total, manufacturing shipments were still up a healthy 1.8%.

So far in 2003, manufacturing has lost an estimated 77,000 jobs, according to the Labour Force Survey. But Statistics Canada's latest Business Conditions Survey showed manufacturers are more upbeat about employment and production prospects for the last three months of the year. The vast majority (86%) indicated that they would maintain or add to their workforce, while 34% indicated they would increase production.

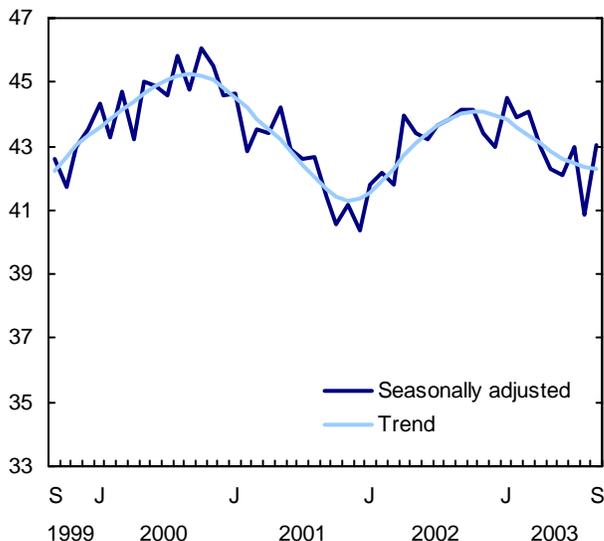
In September, manufacturers trimmed another 0.7% from inventories, the fifth consecutive decline. Inventories were pegged at \$60.9 billion, the lowest level since \$60.8 billion in April 2000.

Finished-product inventories, which have been on a downward trend throughout 2003, edged back to \$19.0 billion in September, a 13-month low.

Although lower levels of finished-product inventories are encouraging, the recent appreciation in the value of the Canadian

Shipments bounce back in September

\$ billions



dollar may be a key obstacle to further advances in demand from the United States, Canada's largest trading partner. This could hinder further reductions in finished-product inventories.

Strong shipment activity coupled with lower inventories contributed to a notable drop in the inventory-to-shipment ratio to 1.42 in September from August's 1.50, the high for the year.

Burdened by lacklustre demand and order cancellations since mid-2002, unfilled orders have weakened substantially in the last year. In September, manufacturers posted the first increase (+1.1%) in unfilled orders in over a year, to \$38.8 billion.

They also reported an 8.0% increase in new orders to \$43.4 billion, the third gain in the last four months.

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

Foreign investors flock to Canadian equities

Foreign investors added to their holdings of Canadian equities in September, but reduced their investment in Canadian debt instruments.

At the same time, Canadian investors turned away from foreign bonds for the first time this year, following eight months of steady accumulation.

Foreign investors acquired another \$2.1 billion of Canadian stock in September to bring the total for the third quarter to \$5.3 billion. This follows purchases of \$2.6 billion worth in the second quarter. Canadian share prices have risen 17.0% over these two quarters.

American investors purchased \$8.5 billion in Canadian equities over the last two quarters, while investors from other countries reduced their holdings by \$0.6 billion.

Nevertheless, the small \$0.7 billion reduction in September took the total decline since June to \$12.9 billion, reversing about three-quarters of the \$17.5 billion in foreign purchases in the first five months of 2003.

For more information, contact Donald Granger (613-951-1864), Balance of Payments Division.

Trade surplus widens for third straight month

Canada's merchandise trade with the world rebounded in September, recovering most of the declines experienced the month before when the power blackout crippled Ontario and the northeastern United States.

Canadian companies exported \$33.7 billion in merchandise in September, up 4.7%. At the same time, imports rose 4.5% to just over \$28.0 billion.

As a result, Canada's trade surplus with the rest of the world increased for the third straight month, surpassing \$5.6 billion.

(South of the border, a U.S. government report showed that the trade deficit for the United States widened in September to \$41.3 billion, as imports climbed to a record high and exports also moved up sharply.)

Canada's trade surplus with the United States also improved, rising from \$7.7 billion to just over \$8.1 billion, thanks to strong movements in the automotive and forestry sectors.

Merchandise trade

	August 2003 ^r	September 2003	August to September 2003
	\$ millions		% change
	seasonally adjusted, \$ current		

Principal trading partners

Exports			
United States	26,566	27,728	4.4
Japan	806	838	4
European Union	2,005	1,787	-10.9
Other OECD countries	841	1,189	41.4
All other countries	1,958	2,142	9.4
Total	32,177	33,684	4.7
Imports			
United States	18,849	19,606	4
Japan	765	804	5.1
European Union	2,778	2,948	6.1
Other OECD countries	1,502	1,545	2.9
All other countries	2,944	3,133	6.4
Total	26,838	28,036	4.5

^r Revised figures.

American companies purchased \$27.7 billion in Canadian merchandise, up 4.4%. These exports accounted for 82% of Canada's total. Importations from the United States were up 4.0% to 19.6 billion, accounting for about 70% of total imports.

On a year-to-date basis, total merchandise exports were 1.4% lower than in the same period of 2002, while imports were down 2.7%.

Almost half of the \$1.5-billion jump in exports stemmed from increased activity in the automotive sector, where exports surpassed \$7.4 billion (+10.4%). This followed an abnormally low August, due in part to the blackout.

All industrial categories increased, pushing exports of industrial goods and materials to \$5.5 billion (+4.4%).

Exports of energy products amounted to \$5.1 billion (+4.6%) and natural gas \$2.5 billion (+7.0%). Electricity exports more than doubled, from \$111 million in August to just under \$250 million.

Offsetting these gains were lower crude petroleum exports, which slid 9.2% to \$1.4 billion, their second consecutive monthly decline. Prices for crude petroleum dipped 3.4%, ending two months of hikes.

Other wood fabricated materials jumped 13.1% to a record level of over \$650 million on higher exports of plywood and of oriented strandboard.

Wheat exports rose 29.2% to \$81 million, rising by almost \$200 million during the third quarter of 2003 as a whole. Shipments from Ontario accounted for the majority of this increase, as recent harvests yielded higher-than-usual production.

Exports of meat and meat preparation surged 46.2% after the United States reopened its borders to selected cuts of Canadian beef. On May 20, 2003, most nations imposed a ban on Canadian beef products after a single breeder cow tested positive for mad cow disease.

In terms of imports, strong automotive activity reversed most of the declines in August. Manufacturers overcame production delays and shutdowns that curtailed output during the summer slowdown, as well as the power outage. Imports in the automotive sector surged 11.4%. Passenger autos accounted for the bulk of the increase, rising 22.8%.

Imports of trucks and other motor vehicles climbed 20.9% to \$1.1 billion and motor vehicle parts advanced 3.1%, reaching \$3.1 billion.

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

Homeowners spend record high on renovations, repairs

Homeowners spent more than ever last year on repairing and renovating their homes, spurred by factors such as low interest rates and higher disposable incomes.

On average, homeowners spent \$2,910 repairing or renovating their homes in 2002, about 9% more than they did in 2001, according to data from the 2002 Homeowner Repair and Renovation Survey. This was about 58% higher than the average of \$1,837 in 1998, which was a decade low.

Roughly two-thirds was devoted to work contracted out, and about one-third to materials purchased separately by the homeowner. This proportion remained unchanged from previous years.

In total, homeowners spent \$23.4 billion on repairs and renovations in 2002, an increase of nearly 11% from 2001, and about 75% higher than the decade-low total of \$13.4 billion in 1996.

There are several possible reasons for this increase, including low interest rates, strong employment growth, higher disposable incomes and shortages in the rental and resale housing markets. These factors contributed to higher investment in new housing and in repairs and renovations of existing housing.

One in four households that reported at least one repair or renovation expenditure spent less than \$500, accounting for 1%

of total repair and renovation spending. In contrast, 22% of reporting households spent \$5,000 or more, accounting for 71% of repair and renovation spending.

About 76% of the nation's 8.1 million homeowner households indicated they had made at least one repair and renovation expenditure, about the same as in 2001. The proportion ranged from a high of 84% in Prince Edward Island, to a low of 67% in Alberta.

About 45% of owners undertook some type of interior or exterior paint job, the most common type of work reported. Also commonly reported were repairs to plumbing fixtures, to patios, fences or driveways, and to heating or air conditioning systems.

Average spending on repairs and renovations ranged from a low of \$2,130 in Manitoba to a high of \$3,480 in Ontario.

Households with a before-tax annual income of less than \$20,000 in 2002 spent on average \$1,570 on repairs and renovations. Their median expenditure was \$200. About 64% of these households reported some expenses. They represented 8% of all homeowner households, as well as 5% of total spending.

In contrast, households with a before-tax annual income of \$80,000 and over in 2002 spent an average of \$4,530. About 86% of these households reported having expenses for repairs and renovations. These households represented 21% of the nation's homeowner households, yet they accounted for 33% of total spending.

For more information, contact Client Services (1-888-297-7355), Income Statistics Division.

Consumers pass by leisure goods in large retail stores

Canada's largest retailers recorded increases in sales in every major commodity group in September, except for sporting and leisure goods. Overall sales surpassed \$7.0 billion, up 4.9% from September last year.

On a year-to-date basis, sales were up 4.6% in the first nine months of this year, compared to the same period last year, according to the Monthly Survey of Large Retailers.

The strongest growth was seen in health and personal care products, home furnishing and electronic products, and hardware and lawn and garden products.

Sporting and leisure good sales fell for the second time in 2003. Sporting good sales, which were up 3.4%, were dragged down by declining sales among the leisure good commodities.

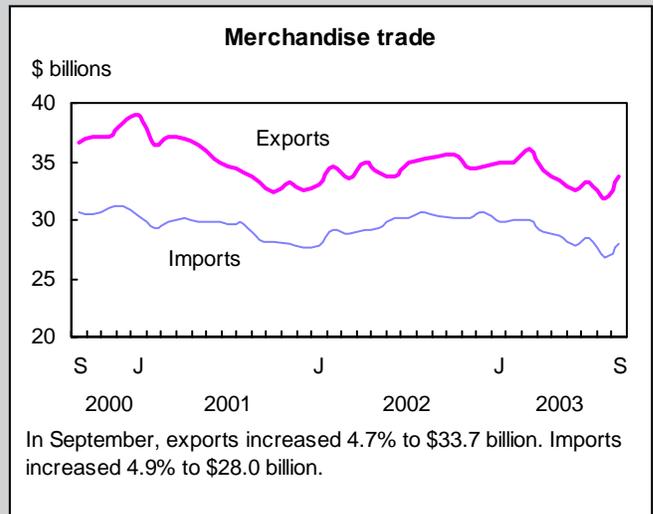
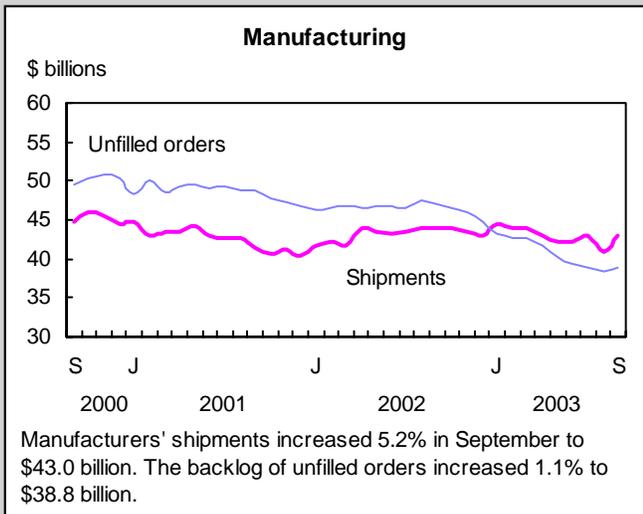
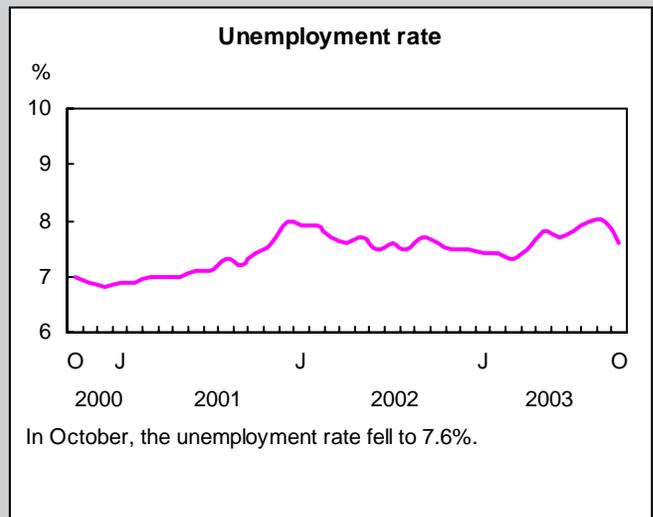
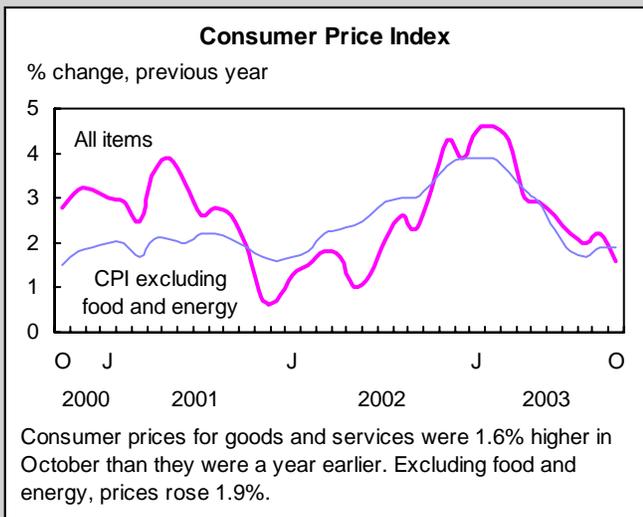
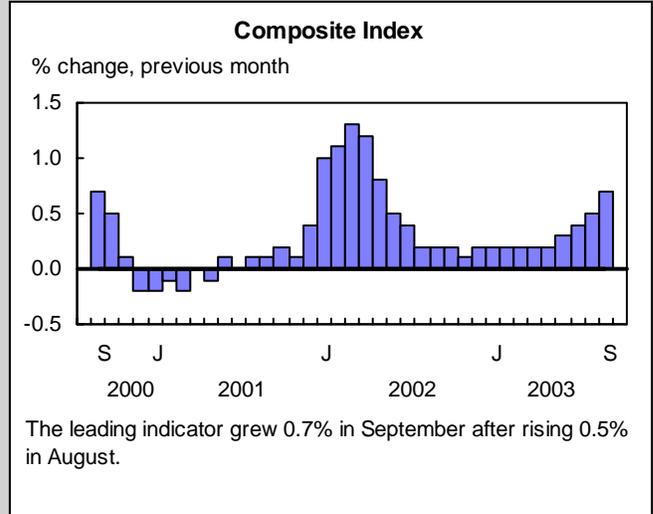
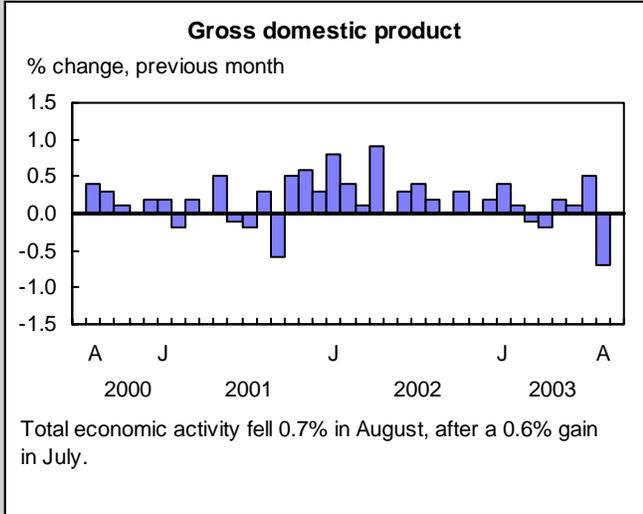
Health and personal care products posted the strongest sales growth (+11.0%). Sales were propelled upward by continued strength in the sale of prescription and over-the-counter drugs.

A red-hot housing market across Canada continued to have a positive effect on the sale of home furnishings and electronics, as did significant growth in the number of new or expanded stores in the past year within this sector.

Sales of home electronics, such as televisions, audio-video equipment, computers, telephones and home office equipment, surged 15.5% from September 2002. Household appliance sales were also much stronger, led by a 17.0% increase in major appliances.

For more information, contact Elton Cryderman (613-951-0669), Distributive Trades 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	August	1,007.7	-0.7%	0.8%
Composite Index (1992=100)	September	184.1	0.7%	2.7%
Operating profits of enterprises (\$ billions)	Q2 2003	40.4	-1.3%	11.7%
Capacity utilization rate (%) ²	Q2 2003	82.5	-1.2†	-1.1†
DOMESTIC DEMAND				
Retail trade (\$ billions)	August	26.7	0.3%	3.9%
New motor vehicle sales (thousands of units)	September*	145.3	1.9%	-3.3%
Wholesale trade (\$ billions)	August	34.2	-4.6%	-2.9%
LABOUR				
Employment (millions)	October	15.8	0.3%	1.6%
Unemployment rate (%)	October	7.6	-0.4†	0.0†
Participation rate (%)	October	67.5	-0.1†	0.3†
Average weekly earnings (\$)	August	681.85	-0.6%	0.8%
Regular Employment Insurance beneficiaries (in thousands)	August	588.89	1.0%	5.7%
INTERNATIONAL TRADE				
Merchandise exports (\$ billions)	September*	33.7	4.7%	-4.9%
Merchandise imports (\$ billions)	September*	28.0	4.5%	-7.6%
Merchandise trade balance (all figures in \$ billions)	September*	5.6	0.3	0.5
MANUFACTURING				
Shipments (\$ billions)	September*	43.0	5.2%	-2.5%
New orders (\$ billions)	September*	43.4	8.0%	-0.2%
Unfilled orders (\$ billions)	September*	38.8	1.1%	-17.3%
Inventory/shipments ratio	September*	1.42	-1.2	-1.1
PRICES				
Consumer Price Index (1992=100)	October*	122.4	-0.2%	1.6%
Industrial Product Price Index (1997=100)	September	108.7	0.2%	-2.6%
Raw Materials Price Index (1997=100)	September	107.7	-3.1%	-8.3%
New Housing Price Index (1992=100)	September	117.9	0.5%	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.

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A weekly review

Published by the Official Release Unit, Communications Division,
Statistics Canada, 10th floor, R.H. Coats Bldg., Ottawa, Ontario, K1A 0T6.

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Price per issue: paper, \$4; online at www.statcan.ca, \$3. Annual subscription: paper, \$145; online, \$100. All prices are in Canadian dollars and exclude applicable sales taxes. Shipping charges will be added for delivery outside Canada.

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Products released from November 13 to 19, 2003

SUBJECT AREA Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Production of eggs	September 2003	23-003-XIB	Free
Production and value of honey and maple products	2003	23-221-XIB	Free
ANALYTICAL STUDIES			
Analytical Studies Branch research paper series: The wealth position of immigrant families in Canada	No. 197	11F0019MIE2003197	Free
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
International travel, advance information	September 2003	66-001-PIE	7/59
DISTRIBUTIVE TRADES			
New motor vehicle sales	September 2003	63-007-XIB	14/133
HEALTH STATISTICS			
Cancer statistics	1992-2001	84-601-XIE	Free
Health reports supplement: Adolescent self-concept and health into adulthood	2003	82-003-SIE	Free
INCOME STATISTICS			
Homeowner repair and renovation expenditure	2002	62-201-XIB	25
INDUSTRIAL ORGANIZATION AND FINANCE			
Inter-corporate ownership	Q3 2003	61-517-XCB	375/1,065
INTERNATIONAL TRADE			
Canadian international merchandise trade	September 2003	65-001-XIB	15/151
Imports by commodity	September 2003	65-007-XMB	40/387
Imports by commodity	September 2003	65-007-XPB	84/828
Imports by country	January-September 2003	65-006-XMB	67/221
Imports by country	January-September 2003	65-006-XPB	133/441
LABOUR AND HOUSEHOLD SURVEYS ANALYSIS			
Perspectives on labour and income	November 2003	75-001-XIE	6/52
MANUFACTURING, CONSTRUCTION AND ENERGY			
Industrial chemicals and synthetic resins	September 2003	46-002-XIE	6/51
Monthly Survey of Manufacturing	September 2003	31-001-XIE	17/158
Particleboard, oriented strandboard and fibreboard	September 2003	36-003-XIB	6/51
PRICES			
The Consumer Price Index	October 2003	62-001-XIB	9/83
The Consumer Price Index	October 2003	62-001-XPB	12/111

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