



Infomat

A Weekly Review

Friday, August 21, 1998

OVERVIEW

◆ Zero growth in exports since the beginning of the year

Exports inched up in June, following a small decline in May. Imports, while down from May, remained higher than in 1997.

◆ Composite index still rising

Despite a decrease in new orders and uneven household demand, the composite leading indicator continued to grow in July.

◆ Recent sales of new motor vehicles are somewhat unstable

New motor vehicle sales fell in June, the first month-over-month decline since January 1998 and the second largest decline since May 1997.

◆ The new housing market continues to improve

The New Housing Price Index posted a year-over-year increase for the 16th consecutive month in June. Activity on the Toronto market was a major factor in this increase.

◆ Number of help-wanted ads unchanged

The Help-wanted Index remained essentially unchanged in July, levelling off in the last four months.

◆ Earnings inequality remains stable overall

The gap between the highest- and the lowest-paid workers has remained relatively unchanged over the past decade.

◆ Larger share of income spent on shelter

The average renter household spent slightly more of its income on shelter in 1996 than in 1991.

Zero growth in exports since the beginning of the year

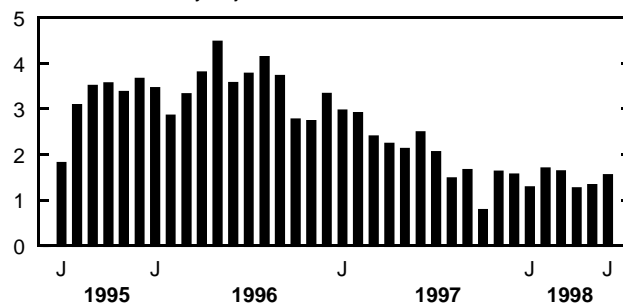
After a small decline in May, the value of exports inched up 0.1% in June. Automotive product exports tumbled, wiping out a strong performance by exports of industrial goods and machinery and equipment. Imports were down 0.8% from May to June, dropping for the second consecutive month. This decrease was largely due to a third straight monthly decline in automotive product imports. The trade balance was \$1.5 billion in June, up \$213 million from the previous month.

In the second quarter of 1998, exports remained stable after declining slightly in the first quarter. Overall, export growth has been flat since the beginning of the year. Plant closures and transportation problems caused second-quarter exports in the automotive sector to fall 4.3% from the first quarter, overshadowing a strong performance by the industrial goods, machinery and equipment, and energy sectors. Imports in the second quarter of 1998 were up 1.5% over the first quarter and remained 10.6% higher than in June 1997.

Automotive product exports in June were down for a second consecutive month, slumping 7.4%. Exports of industrial goods surged 7.8%, setting a new record high. Metals and minerals experienced the biggest advance, with large shipments of gold dominating the industrial goods sector. Energy product exports were up 2.2% in June. Although second-quarter gains erased the losses suffered in the first quarter, exports remained well below

Trade balance

\$ billions, seasonally adjusted



(continued on page 2)



... Zero growth in exports since the beginning of the year

1997 levels. After a three-month decline, forest product exports recovered slightly in June, owing to sustained growth in waferboard exports to the United States and a resurgence in exports of newsprint and other papers. Softwood lumber exports, on the other hand, continued on a downward course.

Exports to Japan in the first half of 1998 were 26.8% lower than in the same period last year, with softwood lumber and coal being the hardest hit. Although exports to the United States continued to fall, they remained 8.6% above last year's level. Much of the decrease resulted from plant closures and transportation problems in the automotive sector. By contrast, Canadian exports to Europe showed strong growth, chiefly due to higher exports of gold and communications equipment.

The decline in imports in June was mainly caused by the drop in imports of automotive products (-10.2%), especially auto parts, as a result of plant closures in that sector. The value of automotive product imports fell half a billion dollars between May and June, leaving second-quarter figures 3.1% below first-quarter levels. A sharp increase in aircraft, computer and crude oil imports failed to offset this decline.

Following a slight dip in May, machinery and equipment imports rose substantially in June (+3.4%), chiefly as a result of aircraft imports from France. Energy product imports climbed 15.8%, stimulated by a strong resurgence in crude oil imports (+27.0%)

Note to readers

Merchandise trade is one component of the current account of Canada's balance of payments, which also includes trade in services.

as they returned to more seasonal levels. Imports of agricultural and fishing products continued their upward trend with a small gain of 2.1% between May and June. Coffee imports posted the largest gain. Although higher shrimp and cod imports are normal for the season, the increase in June was larger than expected, owing to reductions in the prices of these goods in Russia and Denmark.

Available on CANSIM: matrices 3618, 3619, 3651, 3685 to 3713, 3718 to 3720, 3887 to 3913, 8430 to 8435, and 8438 to 8447.

*The June 1998 issue of **Canadian international merchandise trade** (65-001-XPB, \$19/\$188) will be available shortly. The publication will include tables by commodity and country on a customs basis. Current account data, which incorporate merchandise trade statistics, services transactions, investment income and transfers, are available quarterly in **Canada's balance of international payments** (67-001-XPB, \$38/\$124). For further information, contact Jocelyne Elibani (613-951-9647 or call toll-free 1 800 294-5583), International Trade Division. (See also "Current trends" on page 7.)*

Composite index still rising

The leading indicator grew by 0.3% in July, a monthly gain similar to the average since the start of the year, and slightly less than in 1997. Five of the 10 components were up, while three remained unchanged.

New orders were down again, after a two-month pause. They were checked by a drop in exports to the United States, which in recent months have buttressed overall exports against weak shipments to Asia.

Household demand remained uneven. Personal services continued to be the weak spot in employment in business services, while labour disputes intensified and overall demand for labour

slowed. In contrast, sales of durable goods remained firm, owing to continued low interest rates.

The U.S. leading index did not advance in July, for the first time since early 1996. The largest negative influence came from new claims for unemployment insurance. The weakness seems partly due to strikes at General Motors, which may also have reduced consumer confidence.

Available on CANSIM: matrix 191.

*The August 1998 issue of **Canadian Economic Observer** (11-010-XPB, \$23/\$227) is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. (See also "Current trends" on page 7.)*

Recent sales of new motor vehicles are somewhat unstable

New motor vehicle sales fell 3.1% in June to 123,113 units. This was the first month-over-month decline since January 1998 and the second largest decline since May 1997. New truck sales showed the largest decline in June (-5.1%), but new car sales also fell (-1.2%). The trend shows that sales of new cars have flattened since April 1997, while new truck sales have been stable since October 1997. However, recent monthly sales of new motor vehicles have been somewhat unstable.

The Big Three (General Motors, Ford and Chrysler) posted their first month-to-month decline (-3.7%) in new car sales since January 1998. Sales of new cars manufactured in North America increased marginally in June (+0.1%), but remained 1.3% below the same month a year earlier. Although sales of new cars

Note to readers

Passenger cars include those used for personal and commercial purposes (such as taxis or rental cars). Trucks include minivans, vans, sport utility vehicles, light and heavy trucks, coaches and buses.

The Big Three manufacturers are General Motors, Ford and Chrysler. The Big Three may sell new motor vehicles manufactured in North America as well as overseas (imported).

For reasons of confidentiality, the Yukon and Northwest Territories are included with British Columbia. Data are seasonally adjusted unless otherwise indicated.

(continued on page 3)

... Recent sales of new motor vehicles are somewhat unstable

manufactured overseas fell 6.6% in June, they remained 30.2% higher compared with June 1997.

During the first half of 1998, new motor vehicle sales were up 5.1% (seasonally adjusted) over the same period a year earlier. This increase was due to strong truck sales (+11.1%), while car sales were stagnant (-0.1%).

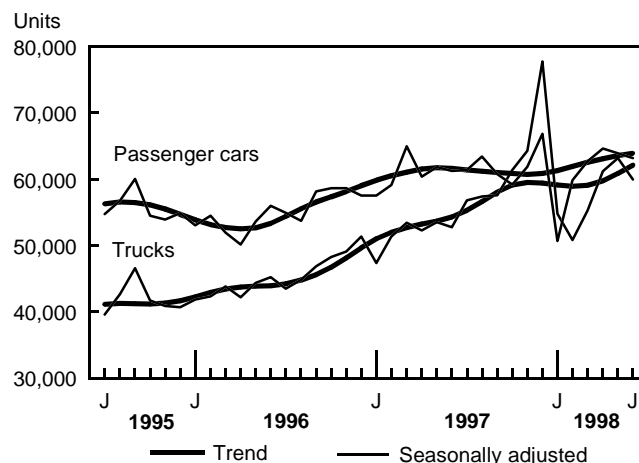
With the exception of Prince Edward Island, new motor vehicle dealers in Eastern Canada posted sales gains for the first six months of 1998 compared with the same period in 1997 (unadjusted for seasonality). New Brunswick was the only province to post a double-digit gain. Consumers east of Manitoba continued their love affair with trucks.

Semi-annual new motor vehicle sales

Not seasonally adjusted

	January to June 1997	January to June 1998	% change
Canada	711,431	746,913	5.0
Newfoundland	11,294	11,781	4.3
Prince Edward Island	2,440	2,431	-0.4
Nova Scotia	20,624	22,165	7.5
New Brunswick	18,856	21,131	12.1
Quebec	180,741	194,071	7.4
Ontario	268,754	291,414	8.4
Manitoba	22,546	21,646	-4.0
Saskatchewan	20,053	18,560	-7.4
Alberta	81,494	86,348	6.0
British Columbia	84,629	77,366	-8.6

New motor vehicle sales



Dealers in the western provinces, except for Alberta, experienced declining sales for the first half of 1998 compared with the same period in 1997 (unadjusted for seasonality). The largest decline occurred in British Columbia. Consumers in the western provinces (again, except for Alberta) purchased fewer cars and trucks than in the first half of 1997.

Available on CANSIM: matrix 64.

The June 1998 issue of *New motor vehicle sales* (63-007-XIB, \$13/\$124) will be available shortly on the Internet at www.statcan.ca. For further information, contact Jeff Fritzsche (613-951-2812), Distributive Trades Division.

The new housing market continues to improve

In June, the New Housing Price Index was 1.0% higher than the same month last year. This was the 16th consecutive month that the index registered a year-over-year increase, after 31 consecutive declines from July 1994 to January 1997. Given Toronto's significant impact on the Canada-level index, the increase of 3.3% in the active Toronto market was a major factor in the increase in the overall Canadian index.

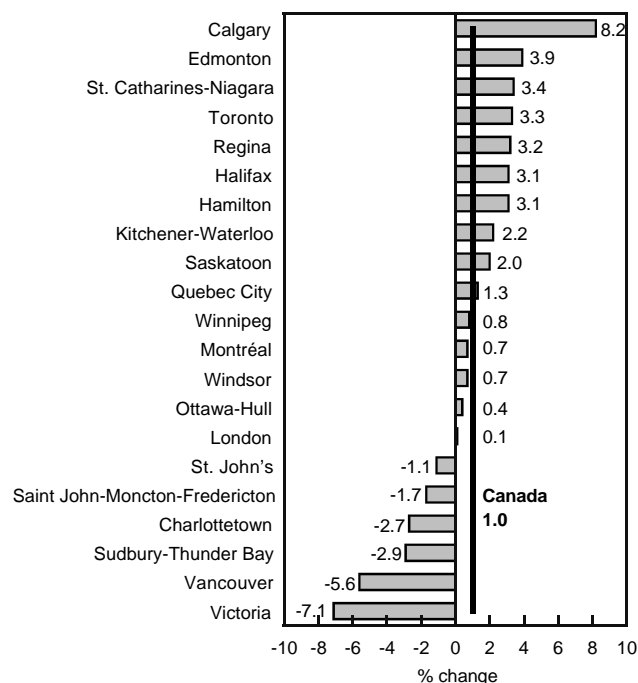
From May to June 1998, the New Housing Price Index rose by 0.1%, continuing the upward trend observed since November 1996. The June increase of 0.1% was the 15th increase in 20 months.

The recent general improvement in new housing markets can be attributed to higher consumer confidence in Ontario and the Prairies, favourable mortgage interest rates and strong activity in the resale market. The largest year-over-year increase in the index was in Calgary, where the market is buoyant.

However, in some places competitive market conditions moderated increases or contributed to decreases in housing prices. Year-over-year decreases were observed mainly in cities on the West Coast, especially Victoria and Vancouver, where the market is still quite competitive. In that area, economic activity has been less dynamic and consumer confidence seems to be lower.

The outlook for future housing construction remains positive, even if expectations are tempered compared with those at the

New housing price indexes, June 1997 to June 1998 (1992=100)



(continued on page 4)

... The new housing market continues to improve

beginning of the year. According to Canada Mortgage and Housing Corporation, the total number of housing starts is forecast to advance 6.3% in 1998 compared with 1997—a slight decrease from forecasts made earlier in the year.

Available on CANSIM: matrix 9921.

*The second quarter 1998 issue of **Construction price statistics** (62-007-XPB, \$24/\$79) will be available in September. For further information, contact Elvira Marinelli (613-951-3350; fax: 613-951-2848; e-mail: infounit@statcan.ca), Prices Division.*

Number of help-wanted ads unchanged

The number of help-wanted newspaper advertisements remained stable in July compared with June. The Help-wanted Index remained essentially unchanged at 144. In

Help-wanted Index, July 1998

Seasonally adjusted

	Index, 1996=100	% change, previous month	% change, previous year
Canada	144	0.7	15.2
Newfoundland	141	-1.4	13.7
Prince Edward Island	137	2.2	6.2
Nova Scotia	138	0.0	11.3
New Brunswick	154	2.0	14.9
Quebec	143	0.7	27.7
Ontario	147	0.7	14.8
Manitoba	157	-1.9	15.4
Saskatchewan	137	-2.8	3.8
Alberta	152	-0.7	1.3
British Columbia	124	1.6	4.2

the last four months, the index has levelled off, following steady increases beginning in July 1996.

The indices in most provinces remained relatively unchanged, with minor increases in Prince Edward Island, New Brunswick, British Columbia, Quebec and Ontario. These gains were offset by minor declines in Newfoundland and the three Prairie provinces.

The Help-wanted Index is a measure of companies' intentions to hire new workers. The index is compiled from the number of help-wanted ads published in 22 newspapers in 20 major metropolitan areas.

Available on CANSIM: matrix 105 (levels 8 to 10).

For further information, contact Gilles Groleau or Michael Scrim (613-951-4090; fax: 613-951-4087; e-mail: labour@statcan.ca), Labour Division.

Earnings inequality remains stable overall

The gap between the highest- and the lowest-paid workers has remained relatively unchanged over the past decade, contrary to assumptions that inequality in earnings has increased. This is shown by a new study on the inequality of earnings during the 1990s. Earnings among the 30% of workers with the lowest earnings increased 1.6% between 1986 and 1995, while earnings among the 30% of workers with the highest earnings increased 1.8%.

However, the overall stability in the inequality of earnings among paid workers as a whole masked a substantial redistribution of working time, wage rates and earnings among various groups of workers. For example, women, older workers, and more highly paid and skilled male workers experienced a gain in earnings, while young people, low-skilled young men, and lower-paid and lower-skilled men did not.

In particular, the gap increased significantly between the highest- and lowest-paid male workers. Between 1986 and 1995, earnings increased 1.1% among the 30% of men with the highest annual earnings, compared with a 4.5% decline among the 30% of men with the lowest earnings. The change was even greater between the top 10% of male earners and the bottom 10%.

Note to readers

*The results in this article are based solely on earnings from paid employment. Other sources of income (such as self-employment income, retirement benefits, transfer payments and returns on investments) are not included. Although earnings are the largest component of total income, trends in **earnings inequality** and **income inequality** can differ (largely due to the effect of Employment Insurance, public pensions and social assistance).*

This increase in the male earnings gap was a continuation of trends during the early 1980s. The reasons for this phenomenon are not well understood; the causes most often cited are technological change and the changing pattern of international trade. Both may have increased the demand for highly skilled labour in Canada, consequently raising the earnings of the more highly paid and skilled men. In contrast, there was no change in the earnings gap among women, with earnings increasing relatively quickly for both lower- and higher-paid women.

Indeed, while the overall annual earnings of employed men as a whole declined a marginal 0.9% between 1986 and 1995,

(continued on page 5)

... Earnings inequality remains stable overall

women saw their real earnings increase in virtually all parts of the income distribution. Over that period, real earnings of women in the bottom half of the income distribution grew by 9%, a rise at least partly due to the increased number of weeks that women worked. This increase in female earnings contributed to the overall stability among paid workers as a whole. However, it must be remembered that even though women experienced earnings gains and men experienced earnings losses, men still earned more than women over the last decade.

The gap also increased between the annual earnings of younger and older workers—particularly among men. This was largely due to declines in real earnings (which are adjusted for inflation) among young workers. It appears that earnings among young people, particularly men, declined because their hourly wage

rates fell, rather than because they worked fewer hours. Earnings among men aged 18 to 24 recovered only slightly from the declines experienced in both the recession of the early 1980s and that of the early 1990s. As a result, between 1977 and 1995, real annual earnings among men aged 18 to 24 who worked for the full year on a full-time basis fell 20%, whereas they declined 12% for men aged 25 to 34. The situation was similar among young women, although their decline in real annual earnings was smaller.

*The research paper **What is happening to earnings inequality and youth wages in the 1990s?** is available on the Internet at www.statcan.ca. To obtain a copy of the paper, contact H  l  ne Lamadeleine (613-951-5231), Business and Labour Market Analysis Division. For further information, contact Garnett Picot (613-951-8214), Business and Labour Market Analysis Division.*

Larger share of income spent on shelter

According to data from the 1996 Census, the average renter household spent slightly more of its income on shelter than it did in 1991, while the average for homeowners remained the same. On average, renters paid \$595 for shelter costs in 1996, down 2.5% from 1991 after adjusting for inflation. However, their average household income declined 12.4% to \$30,635 between 1990 and 1995. This resulted in renters paying a higher proportion of their income on shelter, up from 21% in 1991 to 23% in 1996.

Homeowners paid an average of \$754 each month in shelter costs in 1996, down 1% from 1991. This decrease occurred at the same time as their average household income fell 5% to \$59,285 over the five-year period. As a result, the average proportion of income spent on shelter was the same (15%) in 1991 and 1996. A mortgage made a significant difference in the average monthly shelter cost for owners. Mortgage-free households paid an average of \$330 a month in 1996, compared with an average of \$1,128 a month paid by households with a mortgage.

In 1996, nearly 2.8 million households, or 26% of all households, spent 30% or more of their income on shelter, compared with 23% in 1991. While households spending 30% or more of their income on shelter costs do not necessarily have housing

Note to readers

***Household income** represents the total income of all household members 15 years and over received in 1995. Income for 1990 was adjusted for changes in the Consumer Price Index.*

***Monthly shelter costs** refer to rent, mortgage payments, condominium fees, electricity, gas, oil or other heating fuels, water and other municipal services.*

affordability problems, the 30% measure provides a useful benchmark for assessing trends in housing affordability.

Housing affordability problems affected renters more than owners. In 1996, 1.7 million renters, or 43% of all renters, spent 30% or more of their household income on shelter. This compares with 1.3 million renters, or 35% of the total, five years earlier. Among owners, 1.1 million, or 17%, spent 30% or more of their household income on housing. This was an increase from 930,650, or 15% of the total, in 1991. Those aged 30 to 49 who had a mortgage were more likely to spend 30% or more of their income on housing.

In terms of absolute numbers, the largest number of households paying 30% or more of their income on shelter in 1996 were people living alone (1.1 million households or 42%), followed by family households consisting of couples with children (663,445 households or 18%), and lone-parent family households (472,495 households or 44%).

Shelter costs and household income in 1995 constant dollars by tenure

	Average shelter cost			Average household income		
	1991	1996	1991 to 1996	1990	1995	1990 to 1995
	\$	\$	% change	\$	\$	% change
Owners	761	754	-0.9	62,319	59,285	-4.9
With mortgage	1,179	1,128	-4.3	66,496	63,686	-4.2
Mortgage free	317	330	4.1	57,879	54,289	-6.2
Renters	610	595	-2.5	34,959	30,635	-12.4

(continued on page 6)

... Larger share of income spent on shelter

Vancouver, Toronto, Montreal and Ottawa-Hull had the greatest proportions of households spending 30% or more of their income on shelter in 1996, especially among renter households. Between 1991 and 1996, the number of households with potential affordability problems increased 37% in Vancouver, compared with 32% in Toronto and Ottawa-Hull, and 25% in Montreal.

The average shelter cost in 1996 for households spending 30% or more of their income on housing was \$1,085 in Toronto, down

21% from 1991 after adjusting for inflation. However, the decline in average real income was even greater among these households (-23.1%). In Montreal, the average shelter cost was \$728 per month in 1996, a 16% decrease from 1991. At the same time, real income declined 18%. In Ottawa-Hull, the cost declined 12% to \$881 per month between 1991 and 1996, while income declined 15%. And in Vancouver, the cost increased 4.2% to \$1,070, while household income declined 3%.

For further information, contact Oliver Lo (613-951-2548), Housing, Family and Social Statistics Division.

New from Statistics Canada

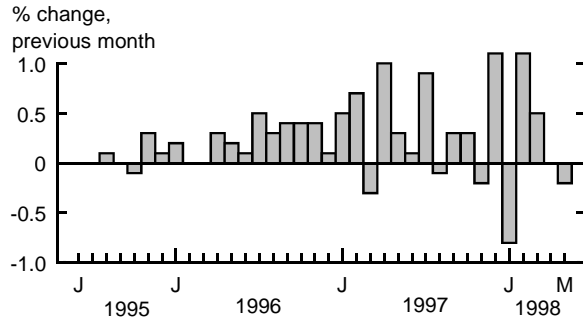
Literacy utilization in Canadian workplaces 1994

Literacy utilization in Canadian workplaces profiles the literacy skills of workers and the literacy requirements of the workplace. The study, which was conducted by Professors Harvey Krahn and Graham S. Lowe of the University of Alberta, was the fourth in a series of monographs from the 1994 International Adult Literacy Survey. Part of the study looks at the extent to which the literacy skills of workers "fit" their job requirements.

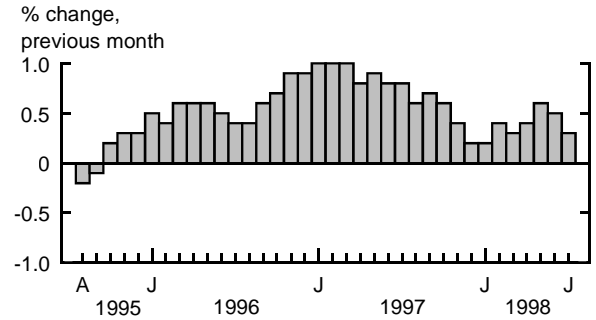
Literacy utilization in Canadian workplaces, no. 4 (89-552-MPE, \$10; Internet version: 89-552-MIE, free) is now available. A highlights paper summarizing the report is also available free on the Internet (89F0103XIE) at www.statcan.ca. For further information, contact Nancy Darcovich (613-951-4585; e-mail: darcovi@statcan.ca), Special Surveys Division.

Current trends

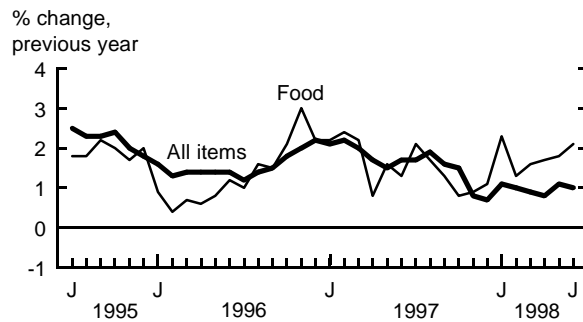
Gross domestic product



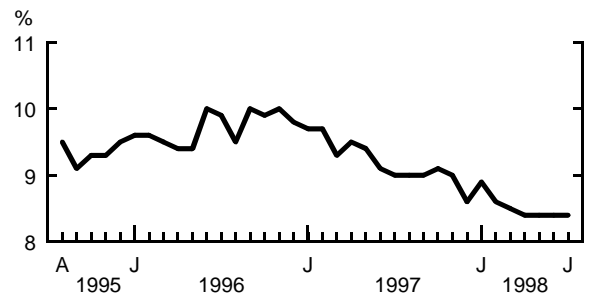
Composite Index



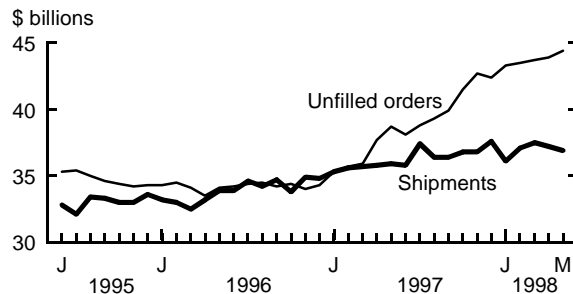
Consumer Price Index



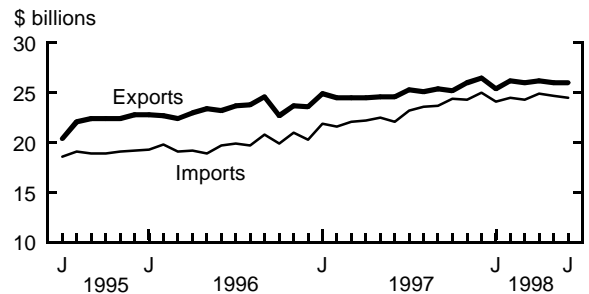
Unemployment rate



Manufacturing



Merchandise trade



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

Latest monthly statistics

	Period	Level	Change, previous period	Change, previous year
GENERAL				
Gross domestic product (\$ billion, 1992)	May	710.0	-0.2%	3.0%
Composite Index (1981=100)	July*	207.7	0.3%	5.4%
Operating profits of enterprises (\$ billion)	Q1 1998	27.3	-6.0%	2.6%
Capacity utilization (%)	Q1 1998	86.0	0.3†	2.6†
DOMESTIC DEMAND				
Retail trade (\$ billion)	May	20.9	0.5%	6.3%
New motor vehicle sales (thousand of units)	June*	123.1	-3.1%	8.0%
LABOUR				
Employment (millions)	July	14.3	0.2%	2.2%
Unemployment rate (%)	July	8.4	0.0†	-0.6†
Participation rate (%)	July	64.9	0.2†	0.0†
Labour income (\$ billion)	May	38.3	-0.2%	3.0%
Average weekly earnings (\$)	May	607.09	-0.2%	0.8%
INTERNATIONAL TRADE				
Merchandise exports (\$ billion)	June*	26.0	0.1%	5.7%
Merchandise imports (\$ billion)	June*	24.5	-0.8%	10.6%
Merchandise trade balance (all figures in \$ billion)	June*	1.5	0.2	-0.9
MANUFACTURING				
Shipments (\$ billion)	May	36.9	-1.0%	2.8%
New orders (\$ billion)	May	37.4	-0.4%	1.1%
Unfilled orders (\$ billion)	May	44.4	1.1%	14.7%
Inventory/shipments ratio	May	1.32	0.02	0.02
PRICES				
Consumer Price Index (1992=100)	July*	108.8	0.0%	1.0%
Industrial Product Price Index (1992=100)	June	119.1	0.1%	-0.3%
Raw Materials Price Index (1992=100)	June	107.0	-3.2%	-15.9%
New Housing Price Index (1992=100)	June	100.1	0.1%	1.0%

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

* new this week

† percentage point

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A weekly review

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Publications released from August 13 to 19, 1998

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription	
			Canada (C\$)	Outside Canada (US\$)
DISTRIBUTIVE TRADES				
Wholesale trade	June 1998	63-008-XIB	14/140	14/140
INDUSTRY MEASURES AND ANALYSIS				
Gross domestic product by industry	May 1998	15-001-XPB	15/145	15/145
LABOUR				
Employment, earnings and hours	May 1998	72-002-XPB	32/320	32/320
MANUFACTURING, CONSTRUCTION AND ENERGY				
Oils and fats	June 1998	32-006-XPB	7/62	7/62
Primary iron and steel	June 1998	41-001-XPB	7/62	7/62
Production and shipments of steel pipe and tubing	June 1998	41-011-XPB	7/62	7/62
Steel wire and specified wire products	June 1998	41-006-XPB	7/62	7/62
PRICES				
Industry price indexes	June 1998	62-011-XPB	22/217	22/217
The Consumer Price Index	July 1998	62-001-XPB	11/103	11/103
SCIENCE AND TECHNOLOGY REDESIGN PROJECT				
Science statistics: Service bulletin, Vol. 22, no. 3	1996	88-001-XIB	6/59	6/59
SPECIAL SURVEYS				
Literacy utilization in Canadian workplaces	1994			
Internet		89-552-MIE	Free	Free
Paper		89-552-MPE	10	10

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