



The Daily

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Tuesday, July 21, 1998

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Retail sales advanced 0.5% in May to \$20.9 billion — the fourth consecutive monthly increase.
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After two straight years of virtually no improvement, Canadian companies in 1997 recorded their best performance in labour productivity since 1984. Labour productivity in the business sector increased 2.9% on the heels of strong economic growth and surging business investment.

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MAJOR RELEASES

Retail Trade

May 1998

Retail sales advanced 0.5% in May to \$20.9 billion, the fourth consecutive monthly increase. This broadly based increase followed a strong advance in April, which was concentrated in the automotive sector. Retail sales in May were 6.3% higher than the same month in 1997.

Retail sales generally have been rising since the spring of 1995 with a period of strong growth from the fall of 1996 to the spring of 1997. Retail sales have not advanced at the same pace since the spring of 1997, due to slower increases in the automotive sector. Most other sectors have posted increases in recent months.

Most sectors post higher sales

With the exception of a marginal decline in general merchandise stores, all sectors saw advancing sales in May.

Furniture stores (+2.5%) posted the largest increase in May. Advancing sales by household furniture and appliance stores (+3.7%) offset declines in household furnishings stores (-2.0%). Furniture store sales have generally been increasing since the spring of 1996.

Increasing sales in clothing stores (+1.0%) continued a general pattern of steady advances since the spring of 1996. Since the peak in June 1995, clothing store sales have risen 6.5%. Advances over this period were strongest in "other clothing stores" (+15.0%), which includes stores that sell men's, women's and children's clothing. Shoe (+3.2%) and women's (+2.5%) clothing stores experienced smaller advances since June 1995, while sales at men's clothing stores declined 7.1%.

Most sectors register advances



After a strong increase in April, sales in the automotive sector posted a marginal advance in May (+0.4%). Advancing sales by motor and recreational vehicle dealers (+0.8%) and gasoline service stations (+0.3%) were partially offset by falling sales by automotive parts, accessories and service stores (-1.6%). Although sales in the automotive sector have generally been rising since the spring of 1995, sales have advanced at a lower rate since the spring of 1997.

Falling department store sales (-1.4%) led to a 0.1% decline in general merchandise store sales. While department store sales suffered their second straight monthly decline in May, sales remained 8.8% higher than the same month in 1997. Despite May's decline, sales in general merchandise stores have generally been rising since mid-1993.

Retailers in Newfoundland lead the way

Newfoundland posted the largest monthly percentage increase in sales in May (+3.2%). After a period of growth that started in the fall of 1996, retail sales in Newfoundland flattened out after mid-1997. All other Atlantic provinces experienced increasing sales for most of the past year.

Retailers in Ontario enjoyed the third straight monthly increase in sales (+2.1%). Led by the furniture and automotive sectors, almost all sectors posted advances in May. Only food stores suffered a decline in sales. Retail sales in Ontario generally have been rising since the summer of 1996 after a period of stagnation beginning in early 1995. During this pause,

only general merchandise stores posted continual increases.

Consumers in Quebec stayed away from auto dealers and furniture stores as sales in the province dropped 0.8% in May. Retail sales in Quebec generally had been rising from early 1996 to mid-1997 and were flat for the rest of 1997. Sales have been volatile in 1998.

Retail sales fell 0.3% in the Prairies in May. Increasing sales in Alberta (+0.7%) were unable to offset declines in all other Prairie provinces. Retail sales in the Prairies generally had posted increases throughout most of 1996 to the end of 1997 — largely on the strength of the automotive sector and general merchandise stores. Weakness in the auto sector at the start of 1998 contributed to declining sales in Manitoba and Saskatchewan and a levelling off of retail sales in Alberta.

Despite increasing sales in furniture and drug stores in May, total retail sales fell 0.7% in British Columbia as all other sectors saw losses. Retail sales in British Columbia have been advancing slowly since the fall of 1995, following nearly seven years of strong advances.

Related indicators

Industry sources suggest that there was a decline in the number of new motor vehicles sold in June. Total employment fell 0.3% in June and the number of housing starts tumbled 4.6%. Strikes in two motor vehicle plants in the United States may result in a reduced supply of new motor vehicles available for sale. In addition, layoffs caused by closures of Canadian plants that either supply or use parts from these American establishments may reduce consumer demand — especially for big-ticket items in Ontario.

Available on CANSIM: matrices 2299, 2398-2417 and 2420.

The May 1998 issue of *Retail trade* (63-005-XPB, \$21/\$206) will be available shortly. See *How to order publications*.

For further information on this release, contact Chantal McIvor (613-951-3549; logener@statcan.ca). For analytical information, contact Bruce Meyer (613-951-3551; meyebur@statcan.ca), Retail Trade Section, Distributive Trades Division. □

Retail sales

Trade group	May 1997	Feb. 1998 ^r	March 1998 ^r	April 1998 ^r	May 1998 ^p	April to May 1998 ^p	May 1997 to May 1998 ^p
seasonally adjusted							
	\$ millions					% change	
Food	4,616	4,743	4,769	4,821	4,831	0.2	4.6
Supermarkets and grocery stores	4,268	4,376	4,411	4,461	4,473	0.3	4.8
All other food stores	348	367	358	360	357	-0.8	2.7
Drug and patent medicine stores	1,009	1,074	1,072	1,087	1,105	1.6	9.5
Clothing	1,099	1,178	1,173	1,169	1,180	1.0	7.4
Shoe stores	135	147	144	147	149	2.0	10.8
Men's clothing stores	129	132	131	131	128	-2.1	-1.1
Women's clothing stores	353	378	383	386	387	0.1	9.6
Other clothing stores	481	521	514	505	516	2.1	7.2
Furniture	966	1,019	1,025	1,020	1,045	2.5	8.2
Household furniture and appliance stores	766	812	818	816	845	3.7	10.3
Household furnishings stores	200	207	207	204	200	-2.0	0.1
Automotive	7,720	7,800	7,833	8,042	8,072	0.4	4.6
Motor vehicle and recreational vehicle dealers	5,266	5,318	5,354	5,499	5,544	0.8	5.3
Gasoline service stations	1,344	1,304	1,288	1,293	1,298	0.3	-3.4
Automotive parts, accessories and services	1,110	1,178	1,192	1,250	1,230	-1.6	10.7
General merchandise stores	2,166	2,346	2,344	2,374	2,371	-0.1	9.5
Retail stores not elsewhere classified	2,058	2,244	2,252	2,252	2,258	0.3	9.7
Other semi-durable goods stores	675	701	699	690	695	0.7	3.0
Other durable goods stores	492	578	565	571	578	1.2	17.5
All other retail stores not elsewhere classified	891	965	988	991	985	-0.6	10.5
Total, retail sales	19,633	20,403	20,468	20,764	20,861	0.5	6.3
Total excluding motor vehicle and recreational vehicle dealers	14,368	15,086	15,114	15,265	15,317	0.3	6.6
Department store type merchandise	6,406	6,896	6,878	6,910	6,974	0.9	8.9
Provinces and territories							
Newfoundland	313	315	312	313	323	3.2	3.1
Prince Edward Island	83	87	87	87	88	1.2	6.2
Nova Scotia	590	632	619	629	627	-0.3	6.4
New Brunswick	460	482	497	505	501	-0.8	8.8
Quebec	4,613	4,885	4,858	4,807	4,770	-0.8	3.4
Ontario	7,104	7,530	7,622	7,804	7,970	2.1	12.2
Manitoba	705	711	729	742	721	-2.9	2.3
Saskatchewan	633	621	635	639	631	-1.3	-0.3
Alberta	2,233	2,322	2,278	2,356	2,373	0.7	6.3
British Columbia	2,832	2,751	2,760	2,810	2,789	-0.7	-1.5
Yukon	27	26	26	25	25	-0.6	-6.9
Northwest Territories	42	43	44	46	43	-7.2	2.6

^p Preliminary figures.

^r Revised figures.

Retail sales

Trade group	May 1997	April 1998 ^r	May 1998 ^p	May 1997 to May 1998 ^p
	unadjusted			
	\$ millions			% change
Food	5,026	4,758	5,122	1.9
Supermarkets and grocery stores	4,657	4,391	4,740	1.8
All other food stores	370	367	382	3.2
Drug and patent medicine stores	1,006	1,067	1,094	8.7
Clothing	1,142	1,073	1,216	6.5
Shoe stores	155	143	172	10.9
Men's clothing stores	136	116	129	-5.5
Women's clothing stores	382	368	418	9.3
Other clothing stores	468	446	497	6.3
Furniture	924	921	982	6.3
Household furniture and appliance stores	722	732	784	8.6
Household furnishings stores	202	189	199	-1.6
Automotive	9,175	8,840	9,390	2.3
Motor vehicle and recreational vehicle dealers	6,524	6,343	6,706	2.8
Gasoline service stations	1,394	1,232	1,327	-4.8
Automotive parts, accessories and services	1,257	1,265	1,357	7.9
General merchandise stores	2,142	2,183	2,294	7.1
Retail stores not elsewhere classified	2,236	2,055	2,390	6.9
Other semi-durable goods stores	783	628	789	0.7
Other durable goods stores	495	510	573	15.8
All other retail stores not elsewhere classified	958	917	1,028	7.4
Total, retail sales	21,649	20,897	22,487	3.9
Total excluding motor vehicle and recreational vehicle dealers	15,126	14,554	15,782	4.3
Department store type merchandise	6,491	6,382	6,947	7.0
Provinces and territories				
Newfoundland	346	311	349	1.0
Prince Edward Island	91	81	94	3.6
Nova Scotia	644	633	667	3.5
New Brunswick	503	502	535	6.5
Quebec	5,346	5,057	5,358	0.2
Ontario	7,748	7,749	8,521	10.0
Manitoba	775	738	775	0.0
Saskatchewan	678	636	662	-2.4
Alberta	2,433	2,361	2,533	4.1
British Columbia	3,011	2,759	2,922	-2.9
Yukon	31	24	28	-10.1
Northwest Territories	45	48	45	-0.2

^r Revised figures.

^p Preliminary figures.

Labour productivity, hourly compensation and unit labour cost 1997 (preliminary)

After two straight years of virtually no improvement, the Canadian business sector in 1997 recorded its best performance in labour productivity since 1984. Labour productivity in the business sector increased 2.9% on the heels of strong economic growth and surging business investment.

This productivity performance was the strongest since 1984 when labour productivity grew 3.3% as the economy recovered from the 1982 recession. Until 1996, productivity gains in business were far less impressive than they were during the mid-1980s, when the economy was recovering more rapidly from the 1982 recession.

However, when the solid rebound in 1997 is taken into account, average productivity gains since the 1991 recession have in fact grown at almost the same pace as during the previous economic cycle in the 1980s. Labour productivity increased an average of 1.1% a year between 1982 and 1991, while it increased an average of 1.2% a year between 1991 and 1997.

Productivity is a measure of production efficiency that most economists regard as the foundation of growth in a country's standard of living. Labour productivity is a measure of the output per worker and is closely related to the remuneration paid to employees. It grows both when businesses become more efficient and when businesses increase the amount of machinery and equipment and advanced technologies that each worker uses.

Canadian manufacturing (an important segment of the business sector) increased productivity 2.7% in 1997 — more than double the rate of increase in 1996. Between 1991 and 1997, productivity in manufacturing has increased at an average annual rate of 2.3% a year. The largest average annual increase in productivity during the same time period was in the communication and other utilities services sector (+3.3%).

Productivity growth higher in Canada in 1997

With the 2.9% increase in productivity in 1997, Canadian businesses recorded a better performance than their American counterparts. In the United States, labour productivity increased 1.8% in 1997, just under the 2.0% growth recorded in 1996.

Between 1991 and 1997, labour productivity in the business sector grew an average of 1.2% a year in Canada and 1.3% a year in the United States. Despite

Definitions

Labour productivity, or real GDP per hour worked, is the ratio between output and labour input (hours worked). Economic performance as measured by labour productivity must be interpreted carefully, since these estimates reflect changes in the other factors of production in addition to growth in productive efficiency. In this release, the terms Productivity refers to labour productivity.

Unit labour cost is the labour cost per unit of output. It is calculated as the ratio between labour compensation and real gross domestic product. It is also the equivalent of the ratio between labour compensation per hour worked and labour productivity. Unit labour cost will increase when labour compensation per hour worked increases more rapidly than labour productivity.

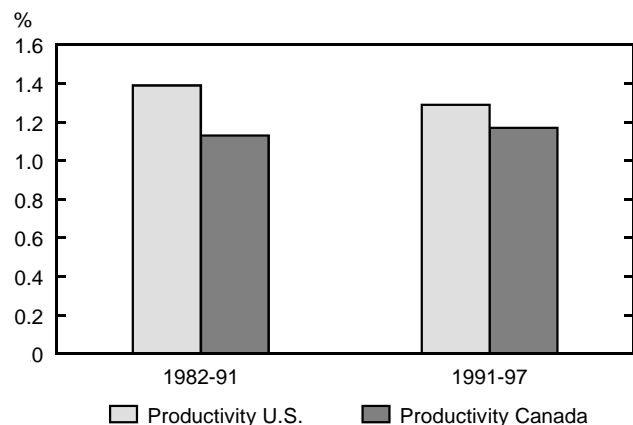
Total labour compensation includes all payments in cash or in kind by domestic producers to persons at work as remuneration for work. This includes the salaries and supplementary labour income of paid workers, plus an imputed labour income for self-employed workers.

Business sector used for productivity measures excludes all non-commercial activities as well as the rental value of owner occupied dwellings. Corresponding exclusions are also made to labour inputs. Business GDP as defined here accounted for about 71% of GDP in 1992.

Business sector goods include agriculture, fishing, forestry, mining activities, manufacturing, construction and public utilities. **Business sector services** comprise transportation and storage, communications, wholesale and retail trade, finance, insurance and real estate and the group of community, business and personal services.

the similarity in productivity growth rates, output as well as hours worked have increased at a faster pace in the United States than in Canada.

Gap in productivity shrinking since 1991



(With respect to the manufacturing industries, labour productivity and unit labour cost estimates

published by the Bureau of Labour Statistics (BLS) in the United States cannot currently be compared with the Canadian data because of a methodological change introduced by the BLS. The BLS is scheduled to release productivity data for the manufacturing industries that will be comparable with Canadian estimates later this summer.)

Hourly compensation increased in Canada but more slowly than in the United States

Hourly compensation increased by 3.2% in 1997 compared with a 2.3% increase in 1996. It was the sixth straight year that Canadian workers in the commercial sector received lower pay increases than their American counterparts. Hourly compensation increased 3.9% in both 1996 and 1997 in the United States.

Since the 1991 recession, hourly compensation has increased an average of 1.9% a year in Canadian businesses, compared with a 3.3% gain in the United States. (Labour income refers to all payments in cash or in kind, including wages, salaries and benefits. Because hourly compensation also takes into account benefits and labour income earned by the self-employed, it is the most comprehensive measure of labour costs for these comparisons.)

The 3.2% increase in hourly compensation in Canada in 1997 was the result of a 3.6% increase in the commercial services sector, combined with a 2.6% increase in the commercial goods sector.

Workers in financial services obtained the highest increase for a second consecutive year, as their hourly compensation rose 9.2%. This sector includes, among others, commission workers such as investment dealers, investment advisors and portfolio managers who have benefited from recent strong performances in the financial markets.

Elsewhere, higher-than-average increases in compensation were obtained by workers in agriculture (+4.3%), transportation and storage (+4.2%) and in mining, quarries and oil wells (+3.8%).

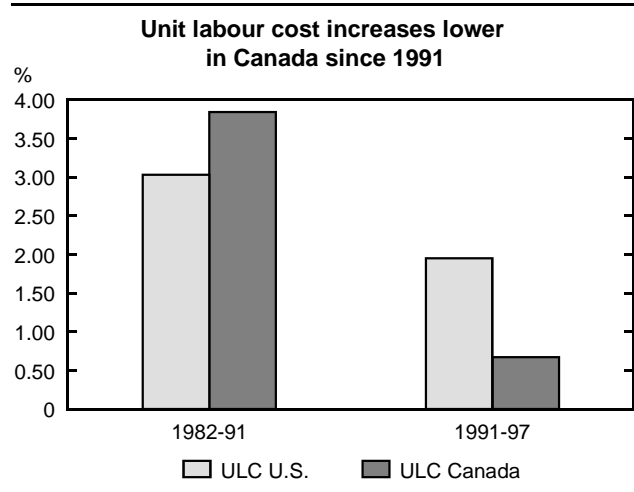
Unit labour costs continued to favour Canadian businesses

In 1997, unit labour costs (ULC) for Canadian business increased 0.3%, which was below the annual average growth rate of 0.7% since 1991.

For the fifth consecutive year, the advance in unit labour costs in Canada (+0.3%) in 1997 was lower than the increase in the United States (+2.0%). Since 1991, unit labour costs increased an average of only 0.7%

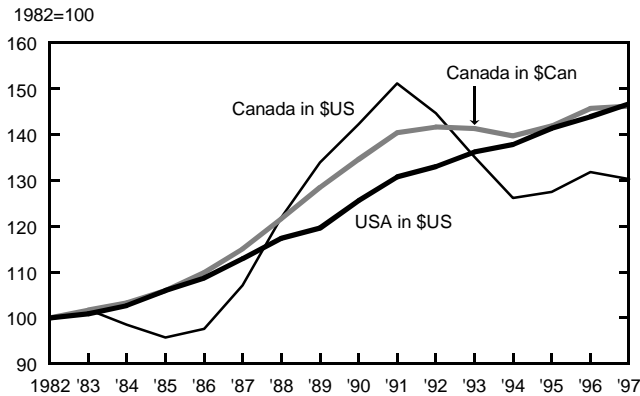
a year for Canadian companies, while they rose an average of 1.9% in the United States.

However, when the declining value of the Canadian dollar is taken into account, unit labour costs of Canadian businesses declined 1.2% in 1997, continuing the downward trend in the 1990s. Canadian unit labour costs, expressed in American dollars, declined an average of 2.5% per year since 1991.



Unit labour cost refers to the ratio of hourly compensation to labour productivity. When labour productivity increases faster than hourly compensation, the unit labour costs decline. Since labour productivity increased at about the same pace in both Canada and the United States, the relatively weaker growth in unit labour costs for Canadian businesses occurred because compensation for American workers increased faster than for Canadian workers.

Depreciation of Canadian dollar lowered labour costs since 1992



Historical revision: little impact on aggregate productivity measures

The data released in today's report reflect the results of an historical revision of Statistics Canada's System of National Accounts. The data were revised back to 1961. The revised productivity estimates also incorporate a new benchmark for hours worked derived

from the Labour Force Survey. On the compensation side, it is important to note that the concept of labour income no longer includes the payroll tax charged to employers on behalf of their employees to fund public health insurance in Quebec and Ontario.

These revisions have had only minor effects on the growth rates of productivity for the entire business sector when calculated on an annual basis and averaged from 1961 to 1996. However, the revisions have slightly increased the growth in productivity in the services sector and slightly decreased the growth in the goods sector. A more detailed set of comparisons of the changes due to the revisions are available by contacting André Picard (613-951-3658) or by accessing CANSIM.

Due to the historical revision of Statistics Canada's System of National Accounts, productivity measures data are now available in new CANSIM matrices.

Available on CANSIM: matrices 9460-9473 and 9475-9483.

For further information on this release, contact Jean-Pierre Maynard (613-951-3654; fax: 613-951-5403; maynard@statcan.ca), Micro-economic Analysis Division. □

Measures of labour productivity and unit labour cost, Canada

	1982 to 1991	1991 to 1997	1997
	Annual % change		
Business sector			
Labour productivity	1.1	1.2	2.9
Real GDP	2.9	3.1	5.4
Hours	1.8	1.9	2.5
Hourly compensation	5.0	1.9	3.2
Unit labour cost	3.8	0.7	0.3
Business sector - Services			
Labour productivity	0.8	0.9	3.0
Real GDP	3.6	3.4	5.8
Hours	2.7	2.4	2.8
Hourly compensation	5.2	1.9	3.6
Unit labour cost	4.3	1.0	0.6
Business sector - Goods			
Labour productivity	1.8	1.7	2.9
Real GDP	2.3	2.8	4.9
Hours	0.5	1.0	1.9
Hourly compensation	4.9	1.9	2.6
Unit labour cost	3.1	0.1	-0.3
Manufacturing industries			
Labour productivity	2.6	2.3	2.7
Real GDP	2.7	4.3	6.1
Hours	0.1	1.9	3.4
Hourly compensation	5.1	2.3	2.6
Unit labour cost	2.4	-0.1	-0.1

Growth rates of business sector productivity measures, Canada

Year	Labour productivity	Hourly compensation	Unit labour cost in \$C	Unit labour cost in \$U.S.
1982	0.8	10.7	9.8	6.7
1983	2.6	4.3	1.7	1.8
1984	3.3	5.0	1.6	-3.3
1985	2.0	4.6	2.5	-2.8
1986	-0.4	3.2	3.7	1.9
1987	0.6	5.4	4.8	9.8
1988	0.5	6.2	5.6	13.8
1989	-0.2	5.5	5.7	9.9
1990	0.4	5.1	4.7	6.3
1991	1.4	5.8	4.3	6.3
1992	2.2	3.1	0.9	-4.3
1993	0.7	0.3	-0.3	-6.6
1994	1.2	0.1	-1.1	-6.6
1995	0.5	2.1	1.6	1.1
1996	-0.4	2.3	2.7	3.4
1997	2.9	3.2	0.3	-1.2
1982 to 1991	1.1	5.0	3.8	4.7
1991 to 1997	1.2	1.9	0.7	-2.5

Growth rates of business sector productivity measures, United States

Year	Labour productivity	Hourly compensation	Unit labour cost in \$U.S.
1982	-0.5	7.5	8.0
1983	3.2	4.2	0.9
1984	2.5	4.4	1.8
1985	1.6	4.9	3.2
1986	2.6	5.2	2.5
1987	-0.1	3.9	3.9
1988	0.6	4.6	4.0
1989	0.8	2.8	1.9
1990	0.7	5.7	5.0
1991	0.7	4.8	4.1
1992	3.4	5.2	1.7
1993	0.2	2.6	2.4
1994	0.4	1.6	1.2
1995	0.0	2.5	2.6
1996	2.0	3.9	1.8
1997	1.8	3.9	2.0
1982 to 1991	1.4	4.5	3.
1991 to 1997	1.3	3.3	1.9

Source: Productivity and related data from the United States used in this publication were released on June 4, 1998, by the Bureau of Labor Statistics, Washington, D.C.

Annual average growth rate of previous and revised productivity and related measures 1961 to 1996

	Labour productivity	Real GDP	Hours worked	Total compensation	Unit labour cost
Business sector:					
Previous	2.1	3.8	1.8	8.8	4.8
Revised	2.0	3.8	1.6	8.6	4.6
Business producing goods:					
Previous	2.8	3.1	0.3	7.7	4.4
Revised	2.6	3.1	0.5	7.5	4.3
Business producing services:					
Previous	1.6	4.5	2.9	9.8	5.1
Revised	1.7	4.6	2.8	9.6	4.8

OTHER RELEASES

Employment Insurance

May 1998 (preliminary)

The estimated number of Canadians who received regular Employment Insurance benefits in May increased 1.3% to 543,450. With approximately a third of the beneficiaries, Ontario (+1.8%), Manitoba (+2.5%), Saskatchewan (+10.1%) and Alberta (+3.4%) all recorded monthly increases. The remaining provinces recorded declines. Both territories recorded small increases.

Regular benefit payments declined slightly (-0.5%) in May to \$676.3 million. Six provinces and the Northwest Territories recorded declines.

Number of beneficiaries receiving regular benefits

	May 1998	April to May 1998
	seasonally adjusted	
		% change
Canada	543,450	1.3
Newfoundland	32,140	-3.5
Prince Edward Island	8,920	-2.6
Nova Scotia	28,600	-1.8
New Brunswick	36,320	-2.8
Quebec	192,820	-0.4
Ontario	121,910	1.8
Manitoba	12,480	2.5
Saskatchewan	10,190	10.1
Alberta	29,230	3.4
British Columbia	68,740	-1.0
Yukon	1,390	2.3
Northwest Territories	1,100	1.2

The number of individuals who applied for Employment Insurance benefits declined slightly (-0.2%) to 222,700 in May. Claims in Prince Edward Island (-10.7%), Ontario (-2.8%), Manitoba (-7.3%), Alberta (-0.6%), the Yukon (-15.7%) and the Northwest Territories (-5.5%) were down, while the number of claims submitted in Nova Scotia (+0.6%) and British Columbia (+0.8%) were little changed. The other provinces recorded increases. Despite some irregular movements, the number of persons submitting Employment Insurance claims has ranged from 219,000 to 250,000 since June 1996.

Employment Insurance statistics

	April 1998	May 1998	April 1998 to May 1998
	seasonally adjusted		
			% change
Regular beneficiaries	536,520 ^P	543,450 ^P	1.3
Regular payments (\$ millions)	679.9	676.3	-0.5
Claims ('000)	223.0	222.7	-0.2

	May 1997	May 1998	May 1997 to May 1998
	unadjusted		
			% change
All beneficiaries ('000)	749.0	686.6 ^P	-8.3
Regular beneficiaries ('000)	557.4	510.6 ^P	-8.4
Claims ('000)	168.3	159.3	-5.4
Payments (\$ millions)	935.8	937.0	0.1

	Year-to-date (January to May)		
	1997	1998	1997 to 1998
			% change
Claims ('000)	1,094.5	1,060.4	-3.1
Payments (\$ millions)	6,050.9	5,768.8	-4.7

^P Preliminary figures.

Note: All beneficiaries includes all claimants paid regular benefits (e.g., due to layoff) or special benefits (e.g., due to illness).

Available on CANSIM: matrices 26 (series 1.6), 5700-5717, 5735 and 5736.

Note: The discrepancy between the estimated number of regular beneficiaries and regular payments series can be explained in part by differences in their reference periods. The number of beneficiaries is a measure of all persons who received Employment Insurance benefits for the week containing the 15th day of the month. The regular benefit payments series measures the total of all monies received by individuals for the entire month.

For further information on this release, Gilles Groleau or Mike Scrim (613-951-4090; 613-951-4087; labour@statcan.ca), Labour Division . ■

Deliveries of major grains

June 1998

Data on June grain deliveries are now available.

Available on CANSIM: matrices 976-981.

The delivery data are contained in the June issue of *Cereals and oilseeds review* (22-007-XPB, \$15/\$149),

which will be available in September. See *How to order publications*.

For further information on this release, contact Rick Burroughs (613-951-2890) or Elizabeth Abraham (613-951-3859), Grain Marketing Unit, Agriculture Division. ■

PUBLICATIONS RELEASED

Pulpwood and wood residue statistics, May 1998
Catalogue number 25-001-XPB
(Canada: \$8/\$73; outside Canada: US\$8/US\$73).

Electric power annual statistics, 1996
Catalogue number 57-202-XPB
(Canada: \$30; outside Canada: US\$30).

All prices exclude sales tax.

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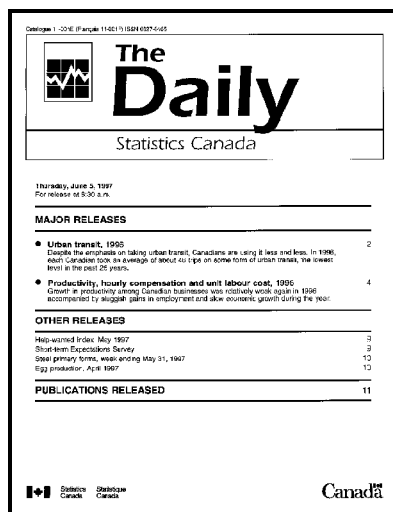
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