# Statistics Canada

Wednesday, July 26, 2000

For release at 8:30 a.m.

### **MAJOR RELEASES**

• Radio listening, fall 1999 In the fall of 1999, Canadians listened to the radio for an average of 20.5 hours a week, about the same as in the fall of 1998, ending four straight years of decline in radio listening.

Book publishers and exclusive agents, 1998/99
 Canadian book publishers and exclusive agents made 55% of their domestic sales directly to the retail sector in 1998/99, and national chains accounted for 31% of the \$925 million retail total.

(continued on following page)

3

## Useful information for manufacturers and exporters

Second edition

The new edition of *Useful information for manufacturers and exporters* is a practical and informative guide that will help you meet business information needs by pointing directly to the information you need. It will help you navigate through the many Statistics Canada products and services that are of specific interest. For your convenience, key sources for important information and how to contact us are provided.

The first section contains a descriptive overview of our data-collection and dissemination activities for the manufacturing sector. Case studies are provided to show you some useful ways to use our data to your advantage. As well, a list of the surveys, publications and research papers available from the Manufacturing, Construction and Energy Division is presented.

In the next sections, we profile the International Trade, Investment and Capital Stock and Science, Innovation and Electronic Information divisions. We discuss some of the premier products and services, and show how easy it is to access trade and capital investment information. The final sections introduce you to the many ways to access information and contact staff at Statistics Canada. As well, other Statistics Canada publications of interest to manufacturers are discussed.

Throughout the guide you will find recent (1999) highlights, trends and some practical examples of how your company can benefit from accessing Statistics Canada information.

The second edition of *Useful information for manufacturers and exporters* (31-532-GIE) is now available on Statistics Canada's Web site (*www.statcan.ca*).

For more information, contact David Beaulieu (613-951-9497; *manufact@statcan.ca*), Manufacturing, Construction and Energy Division.





## The Daily, July 26, 2000

OTHER RELEASES	
Government finance: Revenue, expenditure and surplus, 1999/2000 User guide to 1996 Census income data	9 10
NEW PRODUCTS	11

### **MAJOR RELEASES**

### Radio listening

Fall 1999

In the fall of 1999, Canadians listened to the radio for an average of 20.5 hours a week, about the same as in the fall of 1998, ending four straight years of decline in radio listening.

Prince Edward Island residents listened to radio the greatest number of hours each week; the lowest listenership was recorded in British Columbia.

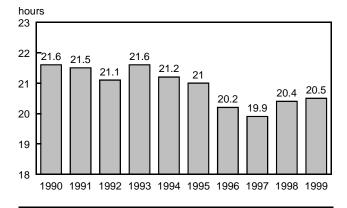
Adult males (18 years old or over) listened almost as much as women of the same age. Teenagers' (aged 12 to 17) listening was a little more than one-half that of adults.

Adult contemporary music remains the favorite listening format in the country.

### Average listening time varies among provinces

In Prince Edward Island, the average weekly radio listening time increased by almost one hour compared with the fall of 1998, to reach the highest listening time in the country (22.1 hours). In 1998, the longest listening times were recorded in Prince Edward Island and Quebec; previously Quebec had always recorded the longest listening time.

# Average listening time was stable compared with 1998



When the data is analyzed according to language, however, anglophone Quebecers' listening was the highest in the country, 23.3 hours a week. Their listening exceeded the listening time of francophone

#### Note to readers

The results in this release are based on a survey of 83,268 Canadians aged 12 and over. They were asked to fill out a diary-type questionnaire for seven consecutive days within an eight-week period from September 6 to September 26, October 4 to October 24, and November 1 to November 14, 1999. While the return rate, at 44%, is modest by Statistics Canada standards, it is in line with Canadian and international broadcasting industry practice for audience measurement. Appropriate care in interpretation is recommended.

The radio project of Statistics Canada's Culture Statistics Program is a joint venture involving the Market Analysis Division at the Canadian Radio-television and Telecommunications Commission (CRTC), the Broadcasting Policy Branch at Canadian Heritage and the Culture Sub-division of Statistics Canada.

The Statistics Canada radio listening data bank integrates files from different sources. The underlying listening data are acquired from the BBM Bureau of Measurement and include the demographics of survey respondents. The CRTC provides the information on the formats of specific stations.

Quebecers by two hours and exceeded the average for all Canadians by almost three hours.

In British Columbia, the average listening time declined slightly from the fall of 1998 to 18.4 hours per week.

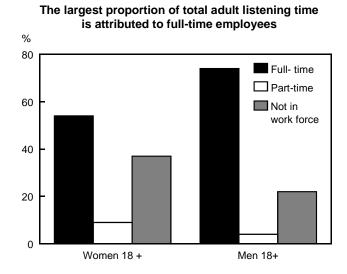
### Adults listen almost twice as much as teenagers

Listening time and habits differ according to age. Adult men listened to the radio (21.3 hours per week) almost as much as adult women (21.6 hours per week). Teenagers' listening time was the lowest (11.3 hours per week), a little more than half that of adults.

This difference between adults and teenagers concerning habits and listening time is not surprising; adults have easier access to radio during weekdays (at the office, for example). During the week, one-third of the adults listening was between 10:00 a.m. and 3:00 p.m., and only 9% of teenagers' listening was during these hours. On weekends, teenagers substantially increased their listening time during the day (37%) to reach almost the same proportion as that of adults (40%).

Adult radio listening varies significantly according to employment status. The largest proportion of total adult listening time is attributed to full-time employees (74% for adult males and 54% for adult females). After 3:00 p.m., their listening decreased gradually,

and 7:00 p.m. to midnight adult listening levels are at their lowest level, 11%.



# Preference for station format varies by province and audience category

The adult contemporary music format continues to dominate, occupying 23% of total listenership. Far behind in second position are the country music and gold/oldies/rock formats, each with 12% of

total listenership. These are followed closely by contemporary music (11%), talk (11%) and the Canadian Broadcasting Corporation (10%).

However, the order of preference of station format varies according to province and audience category. In Quebec, Ontario, New Brunswick and British Columbia, adult contemporary music is the first choice of listeners. In all other provinces, country music is the preferred format, especially in Newfoundland, where it is the preference of 55% of the whole listening audience.

Adult contemporary music is especially strong in the 25-to-54 age group. Teenagers, aged 12 to 17, and adults 18 to 24 prefer the contemporary music format. The talk format and the Canadian Broadcasting Corporation draw very few listeners from the younger groups. However, as the age of the listeners increases, these formats become popular; they represent the first and second choice, respectively, of seniors 65 and older.

The choice of station format also varies according to the level of education. For example, the Canadian Broadcasting Corporation has a low listenership (less than 5%) among listeners who have not completed secondary education, but attracts 26% of total listening among those with a university degree. For the country music format, the trend is in the opposite direction.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Lotfi Chahdi (613-951-3136; fax: 613-951-9040; chahlot@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

# Average hours per week of radio listening

	Canada	Nfld.	P.E.I.	N.S.	N.B.	(	Quebec		Ont.	Man.	Sask.	Alta.	B.C.
					-	English	French	Total					
Total population	20.5	19.1	22.1	19.8	20.7	23.3	21.3	21.3	20.7	19.8	20.4	21.0	18.4
Men													
18 and over	21.3	19.4	22.4	21.2	21.1	22.7	22.2	22.1	21.1	20.6	23.0	22.4	19.5
18–24	16.8	16.2	22.5	15.1	15.4	20.1	17.9	17.6	15.6	19.6	19.5	19.3	15.6
25-34	22.3	19.9	21.5	23.0	24.8	21.0	24.6	23.8	22.2	19.7	27.5	23.9	18.6
35-49	22.1	18.5	22.9	21.0	21.7	21.6	23.5	23.1	21.9	20.2	24.7	22.9	21.0
50-59	21.6	18.4	17.9	22.2	21.1	26.8	22.1	22.4	21.4	21.1	23.0	22.7	20.5
60 and over	21.2	26.7	31.1	23.0	20.1	23.8	20.2	20.8	22.1	22.6	18.1	20.8	19.3
Women													
18 and over	21.6	20.6	23.6	20.5	22.4	25.5	22.5	22.6	22.0	21.0	20.8	21.7	19.0
18–24	17.9	16.8	20.2	16.5	16.1	19.1	17.6	17.6	18.0	20.7	18.7	21.3	15.1
25-34	20.2	17.7	19.3	18.5	22.9	21.3	22.3	22.0	20.5	19.6	19.5	20.4	17.3
35-49	21.2	20.4	23.1	20.2	22.5	24.4	22.8	22.6	21.6	19.0	20.5	20.9	18.4
50-59	23.5	22.7	25.2	23.6	24.1	27.0	24.1	24.3	23.6	21.9	23.9	24.3	21.2
60 and over	23.8	24.5	29.1	21.7	24.0	31.9	23.4	24.3	24.8	24.7	20.9	22.8	21.7
Teens													
12–17	11.3	10.6	14.1	10.2	10.2	12.8	10.4	10.7	12.4	10.9	8.7	12.0	10.2

**Note:** For Quebec, the language classification is based on the language spoken at home. The total column includes those respondents who did not reply to the question or who indicated a language other than English or French.

# Percentage share of radio listening by station format Fall 1999

	Canada	Nfld.	P.E.I	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta.	B.C.
Adult contemporary	23.0	9.4	1.1	14.5	24.3	32.5	25.3	19.4	16.1	9.1	15.0
Album-oriented-rock	6.0	-	0.1	18.3	0.1	3.6	3.3	-	14.9	17.0	8.6
Canadian											
Broadcasting											
Corporation	9.7	10.9	17.1	16.8	14.2	7.6	8.7	10.3	12.5	8.8	13.7
Contemporary	11.2	18.1	30.8	0.7	0.3	20.1	8.2	7.4	0.1	11.1	9.2
Country	12.0	54.8	35.9	30.3	18.6	1.4	8.5	21.0	39.7	26.5	10.5
Easy listening	2.5	-	-	-	-	0.1	4.1	0.5	0.1	2.0	5.8
Gold/oldies/rock	11.9	1.6	13.7	15.9	19.2	2.8	17.3	19.1	6.1	10.7	12.8
Middle-of-the-road	2.1	-	-	-	-	5.9	1.0	3.8	-	-	0.8
Other	7.1	5.2	1.0	2.1	17.8	7.7	6.0	18.3	3.3	9.7	4.6
Sports	0.1	-	-	-	-	-	0.2	-	-	-	-
Talk	11.1	-	-	1.4	0.1	16.8	11.7	-	6.9	4.5	13.9
U.S. Stations	3.4	-	0.3	-	5.6	1.4	5.7	0.2	0.3	0.6	5.1
Total listening	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

<sup>-</sup> Nil or zero.

# Book publishers and exclusive agents

1998/99

Canadian book publishers and exclusive agents made 55% of their domestic sales directly to the retail sector in 1998-99, and national chains accounted for 31% of the \$925 million retail total.

Purchases by these national chain bookstores amounted to \$290 million, while independent bookstores accounted for \$247 million, or 27%. The third major retail client group was campus bookstores, which purchased \$187 million.

# Book publishing and exclusive agency sales, by detailed type of customer

1998-99

	Language of p English	ublisher and ex French	clusive agent Total
	Liigiisii		
		\$ millions	
Wholesale	131	61	193
Retail			
Chain bookstores Independents Accredited bookstores	267 134	23 112	290 247
(Quebec)	3	95	98
Other Campus bookstores	131 165	17 22	148 187
Department stores	16	11	27
Mail order and book clubs	73	4	77
Warehouse clubs and discount	0.5	40	
stores Internet retailers	35 2	19 0	55 2
Other retail	36	5	40
Total	728	196	925
Institutions			
Government and special libraries Public libraries	29 23	1 1	30 24
Elementary/secondary schools	167	54	222
Postsecondary schools	70	6	76
Other institutions	16	1	17
Total	305	63	368
Other			
Direct to general public Other	126 61	8 5	134 67
Total	187	13	201
Total	1,352	334	1,687

Sales to the institutional sector, including libraries and schools, brought in \$368 million in revenues, while sales to wholesalers were \$193 million.

In Quebec, sales to libraries must pass through accredited bookstores. When library sales are added to retail, the combined market represented 58% of domestic sales for English-language firms and 59% for French-language ones.

#### Note to readers

The Survey of Book Publishers and Exclusive Agents is a census of all book publishers and exclusive agents in Canada. The 1998/99 survey covered 643 publishers (including those also acting as exclusive agents), and 57 firms solely functioning as exclusive agents. Data for the territories are not reported because of confidentiality restrictions.

#### **Definitions**

Accredited bookstores are established under Quebec provincial law LRQ Ch. D-8.1. To qualify as an accredited bookstore, the firm must satisfy many requirements, including: being 100% Quebec-owned, operating in Quebec, having at least 6,000 titles in stock (including 2,000 Quebec ones), and having accounts with at least 25 accredited publishers. Unless otherwise specified, they are included with independent bookstores.

**Book publishers** are firms or organizations that select and edit works and enter into a contractual agreement with the author or copyright holder for the production of this work in print or other format. The publisher markets the work through any channel of distribution while bearing the associated costs associated. Some publishers also act as exclusive agents.

A **Canadian-authored title** is one whose author (or editor in the case of anthologies or collected works) is a Canadian citizen or landed immigrant.

**Chain bookstores** are book retailers with outlets in most major cities.

**Exclusive agents** do no publishing of their own, but distribute and sell works published by another firm, by acting as its sole representative. The exclusive agent is generally responsible for the marketing expenses of those titles sold on an exclusive basis.

Independent bookstores either have one outlet or several outlets within a narrow geographic area (a city or province). Although most are not big box retailers, this category also includes big box stores that are not national chains. Unless otherwise specified, accredited bookstores are included in this group.

**Organizations/firms** include publishers and/or agents, whether incorporated, a co-operative, sole proprietorship, partnership or non-profit operation.

**Profit** is calculated before taxes, and is derived by subtracting the cost of goods sold and operating expenses from total revenues.

**Total revenues** include all book publishing and exclusive agency revenues, including the sale of subsidiary rights, grants and sundry income from related activities.

Warehouse clubs and discount stores primarily retail a general line of grocery items in combination with a general line of non-grocery items, and typically sell items in larger formats.

Within the direct-to-retail market, national chains accounted for 37% of sales by English-language publishers and exclusive agents, compared with only 12% for French-language firms. However, sales to warehouse clubs (included as a separate retail category in the survey for the first time) represented only 5% of retail sales for English-language firms, half the market

share that these clubs represented for French-language firms.

# Only three-fifths of publishers and exclusive agents made profits

The industry reported total revenues of \$2.2 billion in 1998/99, including \$133 million in direct exports and \$43 million in grants recognized as revenues. Overall, publishers and exclusive agents generated a pre-tax profit of \$137 million, or 6% of revenues. However, only three-fifths of these firms operated above the break-even point.

Book publishers produced 14,439 new titles in 1998/99, and reprinted 10,262 existing titles. Three-quarters of new and reprinted titles were Canadian-authored. Ninety-two percent of new and reprinted textbooks, but only 13% of mass market paperbacks, were Canadian-authored.

Canadian-controlled publishers and exclusive agents generated \$1.5 billion in revenues, accounting for 63% of total revenues. Their profit margin was 6% of total revenues, compared with 7% for foreign-controlled firms.

Publishers and agents employed 7,374 full-time and 1,298 part-time employees, and paid out \$352 million in salaries, wages and fees to employees, contractors, consultants and other outside workers.

# **Book publishing and exclusive agency** 1998/99

	Canada
Publishers	521
Exclusive agents	57
Both publisher and agent	122
Total	700
Titles Published	14,439
Titles reprinted	10,262
Total revenues (\$000,000)	2,208
Sales in Canada	1,687
Exports	133
Books printed and sold outside Canada	292
Grants recognized as revenue	43
Other related	53
Expenses (\$000,000)	2,071
Salary	352
Other	1,719
Profit (\$000,000)	137
Full-time employees	7,374
Part-time employees	1,298

# Exclusive agents accounted for more than half of sales

The 1998/99 survey covered 700 book publishers and exclusive agents. Of these, 521 were strictly publishers and 57 strictly exclusive agents. One hundred and twenty-two firms combined both activities.

Although only one-quarter of firms were involved in some form of exclusive-agency activity, exclusive-agency sales accounted for 56% of the \$1.7 billion in total sales revenue earned in Canada.

# United States accounted for almost two-thirds of all export revenue

Direct exports accounted for \$133 million in exports with the large majority, \$118 million, generated from sales of publisher's own. The U.S. market accounted for almost two-thirds (63%) of publishers' export revenues. (The destination of exclusive agency exports was not measured by the survey.)

For English-language publishers, 71% of their export revenues were earned in the United States, followed by South and Central America and the United Kingdom.

For French-language publishers, France accounted for 57% of export sales and the United States 21%.

Canadian publishers earned an additional \$292 million from the sale of books printed and sold outside of Canada.

# Grants to French- and English-language publishers were proportional to sales

Canadian-controlled publishers received \$46 million in government grants in 1998/99, which represented about 54% of their pre-tax profits of \$85 million.

Not all publishers, however, were eligible for grants. The Book Publishing Industry Development Program of Canadian Heritage, the largest source of subsidies, excludes publishers with net sales from book publishing activities of greater than \$15 million. When only publishers with revenues below this threshold are considered, French- and English-language publishers received grants proportional to their share of publishing revenue (45% of French publishers, 55% of English publishers).

Publishers below the \$15 million threshold would have been hard-hit without grants. Collective profits would have become losses for both English- and French-language publishers, and in each region if not for these grants.

### Year-over-year comparison

In 1998/99, the Survey of Book Publishers and Exclusive Agents included 200 new firms. Of these, 171 were operating prior to 1996/97, the previous survey year. These firms accounted for 4% of total revenues. Direct comparisons with previous years, using all firms that reported in 1997/98, are not advised owing to changes in the survey population.

To present an indication of how the industry has changed, certain comparisons can be made if

the 171 new book publishers and agents added to the survey were excluded.

The 1996/97 population of publishers and agents comprised 548 firms, including some that went out of business during the interval between the two surveys. In this section, they can be compared with a 1998/99 population of 529 firms, including those that came into existence during the interval.

Total revenues rose 5% for this group, while their collective profit increased 52% to \$128 million. These firms published 9% more new titles than in 1996/97, and reprinted 16% more existing titles.

The importance of chains to Canada's English-language publishers and exclusive agents became more marked; as sales to this client group rose 24% from 1996/97 to 1998/99. Sales to campus bookstores rose 21%, while sales to independents fell 10%.

French-language publishers and exclusive agents experienced no real growth in sales. Their client mix

did vary, however, showing increased sales volume to chain bookstores and decreased sales to accredited bookstores and other independents.

Selected information from the Survey of Book Publishers and Exclusive Agents is now available in table format (87F0004XPE, \$50). These tables include breakdowns by province, language of publisher and country of control. Custom tabulations are available on a cost-recovery basis.

A summary of the data up to 1996/97 appears in Canada's culture, heritage and identity: A statistical perspective (87-211-XPB, \$31). See How to order products.

For more information, or to enquire about the concepts, methods or data quality of this release, or to order standard or custom tabulations, contact David Coish (613-951-3028; fax: 613-951-9040; coisdav@statcan.ca), Culture, Tourism and the Centre for Education Statistics.

### OTHER RELEASES

# Government finance: Revenue, expenditure and surplus

1999/2000

All three levels of government — federal, provincial and local — recorded financial surpluses in the fiscal year 1999/2000, according to Statistics Canada's Financial Management System (FMS). The overall surplus was estimated at \$4.1 billion.

The federal government reported a surplus of almost \$2.6 billion, its third consecutive. Provincial and territorial governments, which reduced their deficits throughout the 1990s, had their first overall surplus in decades, \$1.1 billion. Local governments recorded a surplus of \$367 million, their second consecutive.

The FMS standardizes individual governments' accounts to provide consistent and comparable statistics. As a result, FMS statistics may differ from the figures published in government financial statements.

The surplus of the federal general government's administrative activities in 1999/2000 was about the same amount as in 1998/99, but down significantly from the \$4.5 billion surplus in 1997/98. Revenue increased 2.6% in 1999/2000, while spending rose 2.7%.

Despite increases during the last two years, spending remained 3.3% below its peak in 1995/96. In contrast, revenues were 21% higher than in 1995/96. Spending increased most in social services, protection of persons and property, education, and foreign affairs and international assistance. Transfer payments continued to pick up, while debt charges were much lower. Debt charges represented 24.5% of total spending in 1999/2000, after averaging almost 27% in the second half of the 1990s.

At the provincial-territorial level, 7 of the 13 governments recorded a surplus in 1999/2000. Revenue continued to increase in most provinces. Overall, revenues rose 5.6%, a faster pace than the previous yearly increases of 3.3% and 3.5%. The 1999/2000 increase was largely concentrated in Ontario and Alberta. Own-source revenues, mainly taxes, grew at a solid pace in the Atlantic provinces, Quebec, Ontario and Alberta, but fell elsewhere. Growth in transfer revenues slowed from 1998/1999.

Overall, provincial and territorial governments reported lower spending in 1999/2000. This was due essentially to a restructuring in British Columbia in 1998/1999, when the province decided to assume directly the debt of school districts, postsecondary and

health institutions, and other institutions. This translated into large capital transfers (expenditures).

Without this restructuring, expenditures would have risen 2.5% in 1999/2000 compared with an average of 2.8% during the previous two years. Provincial and territorial spending increased, mainly in the health and education sectors. Health spending rose 5.4% on the heels of a 7.2% increase in 1998/1999. Education spending rose 3.3%, following a 4.6% increase the year before. Spending on social services remained virtually unchanged.

Debt charges represented 12.5% of total spending at the beginning of the 1990s. The ratio peaked at 15.4% in 1996/1997, easing off to 14.8% in 1999/2000.

Among local general governments (municipalities), the overall financial situation has improved substantially, particularly during the last two years. The deficit of municipalities, which reached \$1.7 billion in 1991, fell considerably in the subsequent years. Between 1995 and 1997, deficits averaged \$250 million annually, a period when municipalities benefited from the Canadian Infrastructure Program.

In 1998 and 1999, municipalities recorded surpluses averaging \$486 million. The restructuring in British Columbia that resulted in a one-time capital transfer from the province to municipalities largely contributed to the situation. The fact that local general governments restrained expenditures for some years also helped. Before advancing 4.0% in 1999, expenditures in 1998 were only marginally above their 1995 level.

On average, spending increased 4.1% in both 1998 and 1999, above its rate of 2.7% during the 1990s. Growth in spending was widespread throughout the provinces in 1999, with spending on social services and housing remaining high in Ontario.

Debt charges represented 8.6% of total municipal spending in 1990, then stabilized around 7.5% in the middle of the decade. The ratio fell to 6.4% in 1999/2000.

Available on CANSIM: matrices 2867, 2868, 2873, 2874, 2877, 2879-2881, 2883, 2884, 3315-3318, 3327-3330, 3776-3788, 6345-6364, 7080-7100, 8181-8195 and 8450-8493.

Data are also available through custom and special tabulations. For more information, or to enquire about the concepts, methods or data quality of this release, contact Lisa McCambley (613-951-4354; *lisa.mccambley@statcan.ca*), Public Institutions Division.

### User guide to 1996 Census income data

A new a comprehensive guide to income information from the 1996 Census is available today. The *User guide to 1996 Census income data* explains the concept of income, and provides definitions of the various sources of income and derived income variables. The report also documents the various aspects of the Census that can have an impact on Census income estimates. These include the actual income questions asked in the 1996 Census, along with instructions to respondents. The report explains, briefly, the methodology adopted to capture the response information, process and edit it for inconsistencies and imputation for non-response. The impact of these operations on income data is described.

The report includes summary results of extensive qualitative evaluation of Census income estimates when

compared with other sources such as the National Accounts and the Survey of Consumer Finances. Also included is a detailed comparison of income-related content and coverage in the census since 1971.

The User guide to 1996 Census income data (75F0002MIE) is available free on Statistics Canada's Web site (www.statcan.ca). On the Products and Services page, choose Downloadable research papers, then Income, expenditures, pensions, assets and debts, then Income.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Client Services (1-888-297-7355; 613-951-7355; fax: 613-951-3012; *income@statcan.ca*), Income Statistics Division.

### **NEW PRODUCTS**

Useful information for manufacturers and exporters, Second Edition Catalogue number 31-532-GIE (Free).

Retail trade, May 2000 Catalogue number 63-005-XIB (\$16/\$155). Tables for the Survey of Book Publishers and Exclusive Agents, 1992–1999 Catalogue number 87F0004XPE (\$50).

All prices are in Canadian dollars and exclude sales tax. Additional shipping charges apply for delivery outside Canada.

Catalogue numbers with an -XIB or an -XIE extension are Internet versions; those with -XMB or -XME are microfiche; and -XPB or -XPE denote a paper version.

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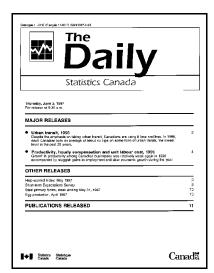
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Authorized agents and bookstores also carry Statistics Canada's catalogued publications.



#### Statistics Canada's official release bulletin

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