



The Daily

Statistics Canada

Friday, June 25, 2004

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MAJOR RELEASES

- **Retail trade, April 2004** 3
 Consumer spending in retail stores fell 0.8% in April to \$28.4 billion, the first decline in four months. April's decline followed a period of strong growth in the first three months of 2004, in which sales advanced by at least 1.0% in each month.
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OTHER RELEASES

- Food services and drinking places, 2002 7
- Placement of hatchery chicks and turkey poults, May 2004 7
- Steel primary forms, weekly data, week ending June 19, 2004 7

(continued on page 2)

Canada food stats

Canada Food Stats is an easy-to-use CD-ROM that offers access to a broad spectrum of food statistics and indicators. It contains information on food consumption and food prices, nutrition, supply and demand, as well as data on the food industry, processing, employment, productivity, trade and much more.

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The *Canada Food Stats* CD-ROM (23F0001XCB, \$81/\$129) is now available. The subscription price includes two issues released in June and November. See *How to order products*.

For more information, contact Client Services (1-800-465-1991), or Kim Boyuk (613-951-2510; foodstats@statcan.ca, Agriculture Division.



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|---------------------|---|
| NEW PRODUCTS | 9 |
|---------------------|---|

| | |
|---|----|
| RELEASE DATES: June 28 to July 2 | 11 |
|---|----|

MAJOR RELEASES

Retail trade

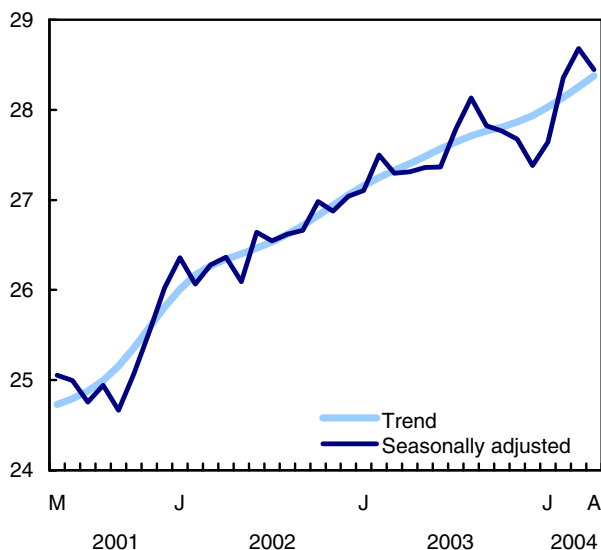
April 2004

Consumer spending in retail stores fell 0.8% in April to \$28.4 billion, according to the newly redesigned Monthly Retail Trade Survey (see the note to readers). April's decline followed a period of strong growth in the first three months of 2004, in which sales advanced by at least 1.0% in each month.

When sales by dealers in the automotive sector are excluded, retail sales fell a marginal 0.1% in April. The automotive sector is made up of new car dealers, used, recreational motor vehicles and parts dealers.

First sales decline in four months for retailers

\$ billions



Despite April's decline, retailers have enjoyed renewed growth since the start of 2004, after falling sales in the last four months of 2003 and moderate gains over the first eight months of that year. Previously, retailers experienced strong sales increases in 2002 and in the fall of 2001.

In constant dollars, retail sales declined 0.9% in April, following a 1.0% gain in March.

Sales down in five of the eight retail sectors

Five of the eight retail sectors, now defined using the North American Industry Classification System (NAICS 2002), posted lower sales in April. Retailers in the automotive sector saw by far the largest sales

Note to readers

Starting with this month's release, data collected from the Monthly Retail Trade Survey are classified according to the North American Industry Classification System (NAICS 2002), which is not comparable to the previously used Standard Industrial Classification (SIC 1980). Consequently, retail sales estimates have been revised from January 1991 to March 2004.

In the NAICS 2002, the retail trade sector now includes home renovation centres and computer and software stores, which were previously classified in the wholesale trade sector in the SIC 1980. In addition, all automotive repair shops have been transferred from the retail trade sector to the services sector.

For information on the retail trade industry classification in the NAICS 2002, please consult our website. From the Definitions, data sources and methods page, select the Industry link found in the Standard classifications section, or follow the link on the survey number found at the end of this release.

decline (-2.3%), followed by those in the food, building supplies, clothing and pharmacy sectors. However, sales were up for retailers in the general merchandise, furniture and miscellaneous sectors.

New car dealers, who represent about 60% of total sales in the automotive sector, suffered a 3.8% sales decline in April. Previously, sales for new car dealers jumped 1.9% in March and 10.5% in February, following six months of falling or stagnant results. April's decline left new car dealers' overall sales at 4.9% short of their July 2003 mark—the last month before sales began to fall. This compares with a decline of 4.3% for the number of new motor vehicles sold over the same period. New car dealers rely on sales of new cars for approximately 60% of their revenues; the rest comes from sales of used cars, parts and labour.

Sales in the food and beverage sector fell 1.0% in April, offsetting the 1.1% gain seen in March. Beer, wine and liquor stores were the main drivers of these sales fluctuations. Sales at supermarkets, which make up for almost three-quarters of the sector, advanced 0.3% in April. Supermarkets have seen little change in their sales since April 2003.

Purchases at building and outdoor home supplies stores declined 0.7% in April, after soaring 6.2% in March. Despite April's decline, sales in building and outdoor home supplies stores remained at record high levels. These retailers enjoyed a 13.2% sales jump in 2003. Housing starts, which in 2003 reached their highest level in 15 years, are continuing to stimulate demand in this sector.

Home centres and hardware stores, which make up slightly more than three-quarters of all sales in the building and outdoor home supplies sector, posted

a 1.2% sales drop in April, following a sizable 9.8% jump over the previous two months. Also in this sector, specialized building materials and garden stores enjoyed their third consecutive monthly gains in April (+1.1%).

Consumer spending in the clothing and accessories sector fell 0.6% in April, after rising by at least 0.9% in each of the previous three months. Sales at clothing stores have generally been increasing since early 2003, after remaining essentially flat in 2002. Clothing stores account for slightly more than one-half of all clothing sales.

Sales at pharmacies and personal care stores decreased 0.3% in April, following a 1.1% jump in March. Pharmacies and personal care stores have enjoyed strong growth since early 2003, showing a year-over-year gain of 7.4% in April.

General merchandise stores post strong gains

Consumers boosted their spending in general merchandise stores by 1.9% in April, continuing the strong growth observed since early 2003. Within this sector, sales were up in general merchandise stores not classified as department stores (+3.4%) and in department stores (+0.6%). April's sales in the general merchandise sector were 10.1% higher than in the same month in 2003.

Despite a 0.5% sales gain in April, retailers in the furniture, home furnishings and electronics sector have seen little change in sales since the fall of 2003. However, both home furnishings stores and furniture stores have enjoyed tremendous growth on a year-over-year basis, with increases of 15.8% and 11.3% in April, respectively. However, computer and software stores have seen their sales decline since the fall of 2003, while sales in home electronics and appliance stores have been essentially flat over the same period.

Central Canada and Atlantic provinces down, Western provinces up

Retailers in Central Canada posted the largest declines in April, with sales down 2.2% in Quebec

and 1.3% in Ontario. April's decline pulled back retail sales in Quebec and Ontario to essentially where they were in the summer of 2003.

In Atlantic Canada, retail sales fell or remained nearly flat, except in Newfoundland and Labrador (+0.5%).

Retail sales increases in Western Canada ranged from 0.2% in Alberta to 2.2% in Saskatchewan in April. Retailers enjoyed sales gains of 0.7% in both Manitoba and British Columbia. While sales have remained at essentially the same high level since February in Alberta, April's gain pushed retail sales to record levels in the other western provinces.

Related indicators for May

Total employment rose for a second straight month in May, following a pause in the first three months of 2004. Growth in full-time jobs was the main factor driving the growth seen in May and April. Housing starts slipped 1.2% in May. Despite declines in May and April, cumulative housing starts since the beginning of 2004 were at their highest level compared with any five-month period since 1987. The number of new motor vehicles sold in May declined by an estimated 3.9% from April, based on preliminary data from the auto industry.

Available on CANSIM: tables 080-0014 to 080-0017 and 076-0005.

Definitions, data sources and methods: survey number 2406.

The April 2004 issue of *Retail trade* (63-005-XIB, \$18/\$166) will be available soon.

Data on retail trade for May 2004 will be released on July 26.

For general information or to order data, contact Client Services (1-877-421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Paul Gratton (613-951-3541), Distributive Trades Division.

□

Retail sales

| | April 2003 ^r | January 2004 ^r | February 2004 ^r | March 2004 ^r | April 2004 ^p | March to April 2004 | April 2003 to April 2004 |
|---|----------------------------|------------------------------|-------------------------------|----------------------------|----------------------------|------------------------------|--------------------------------------|
| seasonally adjusted | | | | | | | |
| | \$ millions | | | | % change | | |
| Automotive | 9,340 | 8,920 | 9,562 | 9,681 | 9,456 | -2.3 | 1.2 |
| New car dealers | 5,719 | 5,225 | 5,775 | 5,884 | 5,659 | -3.8 | -1.0 |
| Used and recreational motor vehicle and parts dealers | 1,195 | 1,145 | 1,208 | 1,248 | 1,249 | 0.1 | 4.6 |
| Gasoline stations | 2,427 | 2,549 | 2,579 | 2,549 | 2,548 | -0.1 | 5.0 |
| Furniture, home furnishings and electronics stores | 1,843 | 1,967 | 1,995 | 1,977 | 1,988 | 0.5 | 7.9 |
| Furniture stores | 634 | 694 | 714 | 701 | 706 | 0.6 | 11.3 |
| Home furnishings stores | 315 | 349 | 360 | 357 | 364 | 2.0 | 15.8 |
| Computer and software stores | 162 | 157 | 152 | 151 | 147 | -2.5 | -9.6 |
| Home electronics and appliance stores | 732 | 767 | 769 | 768 | 771 | 0.3 | 5.3 |
| Building and outdoor home supplies stores | 1,579 | 1,568 | 1,601 | 1,700 | 1,689 | -0.7 | 7.0 |
| Home centres and hardware stores | 1,236 | 1,213 | 1,245 | 1,331 | 1,316 | -1.2 | 6.4 |
| Specialized building materials and garden stores | 342 | 355 | 356 | 369 | 373 | 1.1 | 9.0 |
| Food and beverage stores | 6,549 | 6,617 | 6,586 | 6,660 | 6,591 | -1.0 | 0.6 |
| Supermarkets | 4,801 | 4,818 | 4,753 | 4,752 | 4,768 | 0.3 | -0.7 |
| Convenience and specialty food stores | 707 | 712 | 734 | 751 | 749 | -0.3 | 5.9 |
| Beer, wine and liquor stores | 1,041 | 1,087 | 1,099 | 1,157 | 1,074 | -7.2 | 3.2 |
| Pharmacies and personal care stores | 1,748 | 1,868 | 1,862 | 1,881 | 1,876 | -0.3 | 7.4 |
| Clothing and accessories stores | 1,596 | 1,656 | 1,678 | 1,693 | 1,683 | -0.6 | 5.4 |
| Clothing stores | 1,196 | 1,245 | 1,262 | 1,275 | 1,266 | -0.7 | 5.9 |
| Shoe, clothing accessories and jewellery stores | 400 | 411 | 415 | 418 | 416 | -0.3 | 4.1 |
| General merchandise stores | 3,248 | 3,483 | 3,511 | 3,506 | 3,574 | 1.9 | 10.1 |
| Department stores | 1,689 | 1,809 | 1,872 | 1,819 | 1,830 | 0.6 | 8.4 |
| Other general merchandise stores | 1,559 | 1,674 | 1,639 | 1,688 | 1,744 | 3.4 | 11.9 |
| Miscellaneous retailers | 1,412 | 1,564 | 1,564 | 1,581 | 1,588 | 0.5 | 12.5 |
| Sporting goods, hobby, music and book stores | 705 | 736 | 731 | 730 | 739 | 1.1 | 4.7 |
| Miscellaneous store retailers | 707 | 828 | 833 | 850 | 850 | 0.0 | 20.2 |
| Total retail sales | 27,314 | 27,643 | 28,358 | 28,680 | 28,446 | -0.8 | 4.1 |
| Total excluding new car dealers, used and recreational motor vehicle and parts dealers | 20,401 | 21,272 | 21,375 | 21,548 | 21,537 | -0.1 | 5.6 |
| Provinces and territories | | | | | | | |
| Newfoundland and Labrador | 475 | 481 | 487 | 470 | 473 | 0.5 | -0.3 |
| Prince Edward Island | 115 | 114 | 115 | 119 | 118 | -0.4 | 2.3 |
| Nova Scotia | 832 | 828 | 813 | 856 | 848 | -1.0 | 1.9 |
| New Brunswick | 660 | 652 | 660 | 663 | 663 | 0.1 | 0.5 |
| Quebec | 6,237 | 6,357 | 6,350 | 6,533 | 6,386 | -2.2 | 2.4 |
| Ontario | 10,329 | 10,371 | 10,619 | 10,656 | 10,517 | -1.3 | 1.8 |
| Manitoba | 894 | 916 | 964 | 982 | 989 | 0.7 | 10.7 |
| Saskatchewan | 817 | 795 | 853 | 849 | 867 | 2.2 | 6.0 |
| Alberta | 3,249 | 3,326 | 3,629 | 3,614 | 3,621 | 0.2 | 11.4 |
| British Columbia | 3,608 | 3,705 | 3,771 | 3,841 | 3,867 | 0.7 | 7.2 |
| Yukon | 35 | 36 | 35 | 35 | 35 | 1.7 | -0.1 |
| Northwest Territories | 42 | 42 | 43 | 43 | 43 | -0.7 | 1.6 |
| Nunavut | 20 | 19 | 20 | 20 | 19 | -2.9 | -2.4 |

^r Revised figures.

^p Preliminary figures.

Retail sales

| | April 2003 ^r | March 2004 ^r | April 2004 ^p | April 2003 to April 2004 |
|---|----------------------------|----------------------------|----------------------------|--------------------------------------|
| | unadjusted | | | |
| | \$ millions | | | % change |
| Automotive | 10,123 | 10,054 | 10,378 | 2.5 |
| New car dealers | 6,357 | 6,295 | 6,348 | -0.1 |
| Used and recreational motor vehicle and parts dealers | 1,414 | 1,210 | 1,492 | 5.6 |
| Gasoline stations | 2,353 | 2,549 | 2,537 | 7.8 |
| Furniture, home furnishings and electronics stores | 1,629 | 1,823 | 1,779 | 9.2 |
| Furniture stores | 583 | 633 | 660 | 13.2 |
| Home furnishings stores | 294 | 339 | 340 | 15.6 |
| Computer and software stores | 154 | 180 | 142 | -7.8 |
| Home electronics and appliance stores | 598 | 671 | 637 | 6.5 |
| Building and outdoor home supplies stores | 1,568 | 1,383 | 1,708 | 8.9 |
| Home centres and hardware stores | 1,217 | 1,079 | 1,328 | 9.1 |
| Specialized building materials and garden stores | 351 | 303 | 380 | 8.3 |
| Food and beverage stores | 6,251 | 6,178 | 6,528 | 4.4 |
| Supermarkets | 4,660 | 4,553 | 4,800 | 3.0 |
| Convenience and specialty food stores | 693 | 685 | 751 | 8.3 |
| Beer, wine and liquor stores | 898 | 940 | 977 | 8.8 |
| Pharmacies and personal care stores | 1,709 | 1,868 | 1,862 | 9.0 |
| Clothing and accessories stores | 1,469 | 1,393 | 1,570 | 6.9 |
| Clothing stores | 1,114 | 1,072 | 1,198 | 7.5 |
| Shoe, clothing accessories and jewellery stores | 355 | 321 | 372 | 4.8 |
| General merchandise stores | 3,015 | 2,924 | 3,347 | 11.0 |
| Department stores | 1,551 | 1,496 | 1,688 | 8.8 |
| Other general merchandise stores | 1,464 | 1,428 | 1,659 | 13.3 |
| Miscellaneous retailers | 1,264 | 1,382 | 1,423 | 12.6 |
| Sporting goods, hobby, music and book stores | 633 | 612 | 667 | 5.4 |
| Miscellaneous store retailers | 631 | 769 | 756 | 19.8 |
| Total retail sales | 27,028 | 27,004 | 28,593 | 5.8 |
| Total excluding new car dealers, used and recreational motor vehicle and parts dealers | 19,258 | 19,499 | 20,753 | 7.8 |
| Provinces and territories | | | | |
| Newfoundland and Labrador | 454 | 426 | 464 | 2.2 |
| Prince Edward Island | 106 | 100 | 111 | 4.6 |
| Nova Scotia | 799 | 792 | 839 | 4.9 |
| New Brunswick | 655 | 609 | 667 | 1.8 |
| Quebec | 6,409 | 6,212 | 6,707 | 4.7 |
| Ontario | 10,085 | 9,946 | 10,377 | 2.9 |
| Manitoba | 874 | 919 | 993 | 13.5 |
| Saskatchewan | 805 | 791 | 867 | 7.7 |
| Alberta | 3,210 | 3,445 | 3,626 | 12.9 |
| British Columbia | 3,537 | 3,667 | 3,849 | 8.8 |
| Yukon | 32 | 31 | 33 | 1.7 |
| Northwest Territories | 41 | 47 | 42 | 2.9 |
| Nunavut | 20 | 20 | 19 | -0.8 |

^r Revised figures.

^p Preliminary figures.



OTHER RELEASES

Food services and drinking places

2002

Data for 2002 as well as revised data for 2001 are now available for the food services and drinking places industry, which comprises full-service restaurants, limited-service restaurants, special food services and drinking places.

Full-service restaurants accounted for the largest share of the food services and drinking places industry, 44.9%. Limited-service restaurants accounted for the second largest share, 38.7%, followed by special food services, 8.4%, and drinking places, 8.0%.

Total operating revenues for the food services and drinking places industries grew 2.8 % in 2002 to \$34.1 billion. Over this period, Canada's real gross domestic product grew 3.0% and household spending on food, 2.5%.

Full-service restaurants posted stronger growth (3.9%) than did limited-service restaurants (2.9%). This is in keeping with the demand patterns of an aging population of customers who tend to shift their restaurant spending from limited-service to full-service. Among the food service sectors, drinking places saw a 5% loss in sales in 2002. Industry dynamics for taverns, bars and nightclubs have undergone some changes in recent years, such as the introduction of non-smoking by-laws in many municipalities across the country and an increased emphasis on generating food sales. Such changes can affect the operating structure and financial performance of the industry.

The operating margins for the entire food services and drinking places industry declined from 5.8% in 2001 to 4.6% in 2002. This is partly the result of higher operating expenses, particularly salaries and wages, which rose 4.1%. Most provinces saw lower operating profit margins in 2002.

Slightly more than 83% of all food service revenues were generated from the sales of food and non-alcoholic beverages. Revenue from sales of alcoholic beverages followed at almost 13%. As expected, drinking places earned the majority, 76%, of their revenue from the sale of alcoholic beverages; only 14% of their revenue derived from the sale of food and non-alcoholic beverages.

The cost of sales (36%), followed by labour costs (30%) are the two largest expenses incurred by food service operators, together accounting for nearly two-thirds of their operating revenue in 2002. The cost of alcohol made up the largest share of total operating

revenue for the drinking places (32%) followed by labour costs (26%). The cost of food accounted for only 7%.

Ontario generated the greatest share of revenue in this industry (42%), followed by Quebec (20%), British Columbia (15%) and Alberta (12%). The provincial revenues generated in this industry typically follow Canadian demographics. Ontario accounts for the largest share of Canada's population (38%), followed by Quebec (24%), British Columbia (13%) and Alberta (10%).

Available on CANSIM: table 355-0005.

Definitions, data sources and methods: survey number 4704.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Rose Krakower (613-951-6302), Service Industries Division. ■

Placement of hatchery chicks and turkey poults

May 2004 (preliminary)

Placements of hatchery chicks onto farms were estimated at 52.5 million birds in May, down 9.2% from May 2003. Placements of turkey poults on farms increased 0.4% to 1.9 million birds.

Available on CANSIM: table 003-0021.

Definitions, data sources and methods: survey number 5039.

For more information, or to enquire about the concepts, methods or data quality of this release, contact Sandra Gielfeldt (613-951-2505; sandy.gielfeldt@statcan.ca), Agriculture Division. ■

Steel primary forms, weekly data

Week ending June 19, 2004 (preliminary)

Steel primary forms production for the week ending June 19 totalled 300 075 metric tonnes, down 6.0% from 319 076 tonnes a week earlier and down 0.8% from 302 402 tonnes in the same week of 2003.

The year-to-date total as of June 19 was 7 647 206 tonnes, up 2.0% from 7 499 380 tonnes in the same period of 2003.

Definitions, data sources and methods: survey number 2131.

For more information, or to enquire about the concepts, methods or data quality

of this release, contact the dissemination officer (1-866-873-8789; 613-951-9497; *manufact@statcan.ca*), Manufacturing, Construction and Energy Division. ■

NEW PRODUCTS

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statistics, May 2004, Vol. 3, no. 1
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Direct payments to agriculture producers:
Agriculture economic statistics, May 2004, Vol. 3,
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Catalogue number 21-015-XIE
(free).

Fruit and vegetable production, June 2004, Vol. 73,
no. 1
Catalogue number 22-003-XIB (\$25/\$50).

Canada food stats, June 2004
Catalogue number 23F0001XCB (\$81/\$129).

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Catalogue number 67-202-XIE (\$23/\$51).

Employment, earnings and hours, April 2004, Vol. 82,
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| Thursday, June 3, 1997 For release at 9:30 a.m. | |
| MAJOR RELEASES | |
| ● Urban transit, 1995 Despite the emphasis on taking urban transit, Canadians are using it less and less. In 1996, each Canadian took an average of about six trips on some form of urban transit, the lowest level in the past 25 years. | 2 |
| ● Productivity, hourly compensation and unit labour cost, 1995 Growth in productivity among Canadian businesses also noticeably weak again in 1996 accompanied by sluggish gains in employment and slow economic growth during the year. | 4 |
| OTHER RELEASES | |
| Map-warmed Index, May 1997 | 3 |
| Short-term Expectations Survey | 9 |
| Steel primary forms, week ending May 31, 1997 | 12 |
| Egg production, Apr 1997 | 13 |
| PUBLICATIONS RELEASED | 11 |
|   | |

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The Daily, June 25, 2004

RELEASE DATES: JUNE 28 TO JULY 2

(Release dates are subject to change.)

| Release date | Title | Reference period |
|---------------------|---|-------------------------|
| 28 | National tourism indicators | First quarter 2004 |
| 28 | Movie theatres and drive-ins | 2002/03 |
| 29 | Industrial product and raw materials price indexes | May 2004 |
| 29 | Field crop estimates | July 2004 |
| 29 | Employment Insurance | April 2004 |
| 30 | Gross domestic product by industry | April 2004 |
| 30 | Health Services Access Survey | 2002/03 |