

The Daily

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Releases

Retail trade, May 2008	2
Retail sales in current dollars rose 0.4% in May, largely as a result of increased sales at gasoline stations. This advance was primarily attributable to significantly higher gasoline prices in May. If prices changes are taken into account, retail sales in constant dollars rose by only 0.1%.	
Film and video distribution, 2006	5
Canada's film and video distributors reported total operating revenues of \$1.7 billion in 2006, down marginally from 2005.	
Employment Insurance, May 2008	8
Research and development in the health field, 2007	10
Natural gas sales, May 2008	10
Aircraft movement statistics: Major airports, June 2008	11
Investment in new housing construction, May 2008	11

New products	12
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Releases

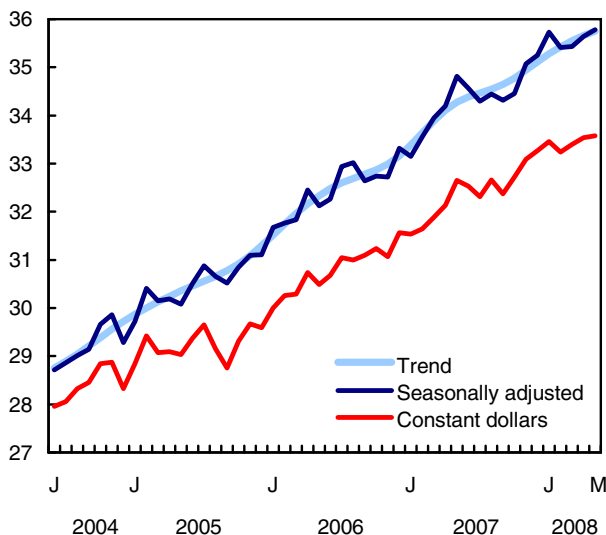
Retail trade

May 2008

Retail sales in current dollars rose 0.4% in May to \$35.8 billion. This was the seventh increase in eight months. The advance was primarily attributable to increased sales at gasoline stations, largely owing to significantly higher gasoline prices (+8.8%) in May compared with April 2008. If the effects of price changes are removed, retail sales in constant dollars rose by only 0.1%.

Retail sales increase for the seventh time in eight months

\$ billions



Retail sales in current dollars were up in five of eight sectors in May. The strongest increases were observed in the automotive sector and in building and outdoor home supplies stores.

Sales in the automotive sector posted a strong 1.1% increase in May, the sixth rise in eight months. Although sales were up in all three components of this sector, the largest sales increase occurred at gasoline stations (+2.4%).

Sales in the building and outdoor home supplies stores sector rose 0.7%, the second increase in eight

months. After growing steadily since early 2005, sales in this sector have remained relatively stable since mid-2007.

Among the three sectors where sales did not increase, the most pronounced drop occurred in clothing and accessories stores (-0.7%). The decrease in this sector stemmed from weak sales in clothing stores (-1.1%), while sales at shoe, clothing accessories and jewellery stores rose 0.9% following five consecutive monthly declines.

Sales up in most provinces

Sales in current dollars increased in eight provinces in May. The most substantial rise (+1.8%) was posted in Saskatchewan. This was the only Prairie province in which higher sales offset the losses incurred in April.

Sales in Ontario rose for the third straight month, completely cancelling out the drop in February. After a period of lower sales in mid-2007, retail sales in Ontario are showing an upward trend.

Retail sales fell 1.2% in Newfoundland and Labrador, the third decline since the peak in January 2008. The May decline can partly be accounted for by weak sales at new car dealers.

For information on related indicators, consult the *Latest statistics* page of our website.

Available on CANSIM: tables 080-0014 to 080-0017.

Definitions, data sources and methods: survey numbers, including related surveys, 2406 and 2408.

The May 2008 issue of *Retail Trade* (63-005-XWE, free) will be available soon.

Data on retail trade for June will be released on August 20.

For more information, or to order data, contact Client Services (613-951-3549; toll-free 1-877-421-3067; retailinfo@statcan.ca). For analytical information, or to enquire about the concepts, methods or data quality of this release, contact Claude Bilodeau (613-951-1816), Distributive Trades Division.

□

Retail sales

	May 2007	February 2008 ^r	March 2008 ^r	April 2008 ^r	May 2008 ^p	April to May 2008	May 2007 to May 2008
Seasonally adjusted							
	\$ millions					% change	
Automotive	12,276	12,457	12,488	12,463	12,596	1.1	2.6
New car dealers	6,678	6,486	6,493	6,414	6,432	0.3	-3.7
Used and recreational motor vehicle and parts dealers	1,624	1,619	1,603	1,561	1,568	0.4	-3.4
Gasoline stations	3,974	4,353	4,392	4,487	4,596	2.4	15.6
Furniture, home furnishings and electronics stores	2,482	2,551	2,549	2,603	2,611	0.3	5.2
Furniture stores	845	850	837	871	872	0.1	3.1
Home furnishings stores	494	511	514	510	512	0.5	3.6
Computer and software stores	122	115	116	120	120	0.3	-1.4
Home electronics and appliance stores	1,021	1,075	1,081	1,103	1,107	0.4	8.5
Building and outdoor home supplies stores	2,189	2,250	2,241	2,226	2,241	0.7	2.4
Home centres and hardware stores	1,787	1,826	1,825	1,819	1,830	0.6	2.4
Specialized building materials and garden stores	402	424	415	407	411	1.0	2.2
Food and beverage stores	7,658	7,800	7,807	7,821	7,818	0.0	2.1
Supermarkets	5,488	5,587	5,610	5,626	5,625	0.0	2.5
Convenience and specialty food stores	829	832	828	823	819	-0.5	-1.2
Beer, wine and liquor stores	1,341	1,381	1,369	1,373	1,375	0.1	2.5
Pharmacies and personal care stores	2,340	2,382	2,406	2,423	2,429	0.3	3.8
Clothing and accessories stores	2,000	2,010	1,958	2,011	1,998	-0.7	-0.1
Clothing stores	1,536	1,543	1,499	1,556	1,538	-1.1	0.1
Shoe, clothing accessories and jewellery stores	464	467	460	456	460	0.9	-0.9
General merchandise stores	4,081	4,171	4,176	4,261	4,254	-0.2	4.2
Miscellaneous retailers	1,787	1,788	1,807	1,831	1,838	0.4	2.9
Sporting goods, hobby, music and book stores	882	885	905	915	921	0.7	4.4
Miscellaneous store retailers	905	903	902	916	917	0.1	1.4
Total retail sales	34,813	35,409	35,432	35,640	35,784	0.4	2.8
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	26,511	27,304	27,337	27,664	27,784	0.4	4.8
Provinces and territories							
Newfoundland and Labrador	540	580	576	580	573	-1.2	6.1
Prince Edward Island	134	140	141	141	141	0.2	5.1
Nova Scotia	972	1,015	1,024	1,006	1,012	0.5	4.1
New Brunswick	790	804	785	805	811	0.8	2.7
Quebec	7,848	7,882	7,654	7,932	7,975	0.5	1.6
Ontario	12,333	12,530	12,667	12,751	12,774	0.2	3.6
Manitoba	1,163	1,244	1,264	1,242	1,256	1.1	7.9
Saskatchewan	1,066	1,174	1,197	1,191	1,211	1.8	13.7
Alberta	5,147	5,160	5,194	5,105	5,142	0.7	-0.1
British Columbia	4,700	4,747	4,801	4,758	4,759	0.0	1.3
Yukon	41	44	44	44	44	-0.4	7.2
Northwest Territories	56	62	60	60	61	0.6	8.3
Nunavut	23	25	25	25	25	1.0	11.4

^r revised

^p preliminary

Note: Figures may not add up to total due to rounding.

Retail sales

	May 2007	April 2008 ^r	May 2008 ^p
	Unadjusted		
	\$ millions		
Automotive	14,652	14,123	14,613
New car dealers	8,126	7,721	7,485
Used and recreational motor vehicle and parts dealers	2,289	2,001	2,144
Gasoline stations	4,237	4,400	4,984
Furniture, home furnishings and electronics stores	2,322	2,340	2,471
Furniture stores	840	819	885
Home furnishings stores	487	485	495
Computer and software stores	112	113	113
Home electronics and appliance stores	883	923	978
Building and outdoor home supplies stores	2,947	2,235	2,950
Home centres and hardware stores	2,372	1,833	2,371
Specialized building materials and garden stores	575	402	578
Food and beverage stores	7,994	7,330	8,557
Supermarkets	5,770	5,359	6,201
Convenience and specialty food stores	881	794	884
Beer, wine and liquor stores	1,344	1,178	1,472
Pharmacies and personal care stores	2,387	2,357	2,476
Clothing and accessories stores	2,044	1,924	2,095
Clothing stores	1,564	1,499	1,610
Shoe, clothing accessories and jewellery stores	480	425	485
General merchandise stores	4,282	4,015	4,532
Miscellaneous retailers	1,792	1,688	1,855
Sporting goods, hobby, music and book stores	831	837	878
Miscellaneous store retailers	961	851	977
Total retail sales	38,420	36,013	39,550
Total excluding new car dealers, used and recreational motor vehicle and parts dealers	28,005	26,291	29,920
Provinces and territories			
Newfoundland and Labrador	596	573	630
Prince Edward Island	148	134	156
Nova Scotia	1,057	978	1,105
New Brunswick	868	804	896
Quebec	9,005	8,342	9,235
Ontario	13,462	12,849	13,895
Manitoba	1,273	1,255	1,380
Saskatchewan	1,190	1,196	1,357
Alberta	5,692	5,091	5,664
British Columbia	5,006	4,663	5,095
Yukon	46	42	49
Northwest Territories	56	60	61
Nunavut	23	25	26

^r revised

^p preliminary

Note: Figures may not add up to total due to rounding.



Film and video distribution

2006

Canada's film and video distributors reported total operating revenues of \$1.7 billion in 2006, down marginally from 2005. However, firms reduced their operating expenses by 9% to \$1.2 billion. As a result, operating profit margin increased to 25% in 2006 compared with 19% in 2005.

The largest expense reported by surveyed firms was the cost of sales, which represented 45% of total expenses. Royalties, rights, licensing and franchise fees accounted for 23% of expenses, while advertising, marketing and promotions accounted for 12%.

Ontario firms dominated Canadian distribution, earning 83% of total operating revenues in 2006, while Quebec firms accounted for 14%.

Domestic distribution revenue offsets drop in exports

Data analyzed in the remainder of this release are based on establishments whose combined revenues account for about 95% of the industry's total revenues.

The two primary sources of revenue for the industry are distribution of film and video titles and wholesaling of pre-recorded videos. Revenues from the distribution of film and video titles accounted for 71% of total national operating revenues in 2006, while wholesaling revenues accounted for 28%.

Industry distribution revenues from exports dropped significantly from 2005. Foreign sales generated revenues of just \$32.8 million in 2006, down from \$90.2 million the previous year.

However, this drop in exports was offset by an increase in revenues from the domestic market.

Film and video distributors increased their distribution revenues in four key markets: motion picture theatres, pay and specialty television, conventional television and home video.

The largest revenue increases were from pay and specialty television (+11.1%) and conventional television (+17.9%) markets. Combined revenues for the motion picture theatre market and home video market increased 2.6% from the year before.

Film and video distributors generate the bulk of their revenues from distributing film and video productions. However, they also make money by wholesaling these videos. Firms that engaged in some wholesaling (as a secondary activity) saw their revenues edge down 0.6% from a year earlier.

Top four companies increase their share of revenues

The top four companies, ranked on the basis of revenues earned, continued to dominate the industry

Note to readers

Data for 2006 for the Film and Video Distribution industry should not be compared with published data prior to 2005, as significant changes were made to the survey. Data are now collected using a sample that accounts for firms earning 95% of the industry's total revenues. Administrative data are used for the smallest firms.

Data for this release include all provinces. However, provincial data are published only for firms in Ontario and Quebec to protect the confidentiality of survey respondents.

Film distribution companies are engaged primarily in distributing film and video productions to a variety of different markets including motion picture theatres, television stations and commercial exhibitors. They are the film industry's intermediaries, the liaison between producers and exhibitors. Distributors obtain the rights to market and distribute films and videos.

Data for 2005 has been revised.

in 2006. These companies accounted for about 73% of total national revenues, up from 71% in 2005.

Expenses for the top four companies decreased 2% over the two-year period and as a result, profits rose from \$284 million to \$322 million in 2006.

The profit margin for the top four companies stood at 27% while the rest of the industry showed a profit margin of 20%.

The sources of distribution revenue for the top four companies differ from those of the rest of the industry. The top four companies generated almost 70% of their distribution revenues from the home video and conventional television markets, whereas the rest of the industry generated almost 65% of its revenues from distributing to the conventional television and theatrical markets.

Conventional television market contributes to increased market share in Canadian content

Distribution revenues from Canadian productions increased in 2006, especially in the conventional television market. In this market, Canadian content accounted for 13.1% of total revenues, up from 4.9% in 2005.

As a result, domestic distribution revenues from Canadian productions represented 11.2% of total domestic distribution revenues, rising from 8.1% in 2005.

In the pay and specialty market, Canadian content accounted for 40% of total revenues, unchanged from the year before. The same was true at movie theatres where Canadian content maintained its 3% share of the market.

Available on CANSIM: table 361-0014.

Conrad Ogrodnik (613-951-3496; fax: 613-951-6696; conrad.ogrodnik@statcan.ca), Service Industries Division.

Definitions, data sources and methods: survey number 2414.

For more information, or to enquire about the concepts, methods or data quality of this release, contact

Selected financial statistics for the film and video distribution industry¹

	Total operating revenue		Salaries, wages and benefits		Total operating expenses		Operating profit margin	
	2005	2006	2005	2006	2005	2006	2005	2006
	\$ thousands						%	
Canada	1,664,496	1,651,519	76,641	73,118	1,353,702	1,237,456	18.7	25.1
Quebec	291,149	235,578	14,726	13,264	223,409	166,944	23.3	29.1
Ontario	1,308,482	1,363,557	59,613	58,299	1,110,234	1,054,163	15.2	22.7

1. Based on the North American Industry Classification System and includes all establishments classified to 512120.

Note: Provincial data are published only for firms in Ontario and Quebec to protect confidentiality of survey respondents.

Distribution revenue for the film and video distribution industry¹, by Canadian and non-Canadian productions, primary market

	2005 ^r	2006
	\$ thousands	
Distribution revenue of Canadian productions by domestic market		
Theatrical market	11,123	11,558
Pay TV market	47,607	52,702
Conventional TV market	12,335	38,719
Home video market	x	x
Other markets	x	x
Sub-total of domestic distribution revenue of Canadian productions	84,305	124,795
Distribution of Canadian productions to foreign clients	79,504	27,645
Total distribution revenue of Canadian productions	163,810	152,438
Distribution revenue of non-Canadian productions by domestic market		
Theatrical market	314,401	326,750
Pay TV market	71,490	79,659
Conventional TV market	237,808	256,217
Home video market	x	x
Other markets	x	x
Sub-total of domestic distribution revenue of non-Canadian productions	952,490	989,927
Distribution of non-Canadian productions to foreign clients	10,740	5,187
Total distribution revenue of non-Canadian productions	963,229	995,114
	%	
Percentage share of domestic market		
Theatrical market ²	3.4	3.4
All markets ³	8.1	11.2

^r revised

x suppressed to meet the confidentiality requirements of the Statistics Act

1. Industry estimates are based on the surveyed portion and are augmented by administrative data for establishments that were too small to be eligible for sampling. The surveyed portion includes only data for surveyed establishments weighted to represent other establishments that were eligible for sampling but were not selected. The surveyed portion represents approximately 95% of total industry revenue. Due to rounding, components may not add to total.

2. Percentage of total revenue from distribution to theatrical markets.

3. Percentage of total domestic distribution revenues.

Profile of the film and video distribution industry¹

	2005 ^r	2006
	\$ thousands	
Operating revenue		
Total revenue from distribution of film and video titles	1,127,039	1,147,554
Wholesaling of pre-recorded videos ²	449,702	447,037
All other operating revenue	47,295	22,613
Total operating revenue	1,624,036	1,617,204
Operating expenses		
Salaries, wages and benefits	71,494	65,267
Licensing costs (rights, royalties and other fees)	238,402	271,217
Cost of goods sold	590,271	541,128
Advertising, marketing and promotions	167,350	140,272
All other operating expenses	249,649	187,137
Total operating expenses	1,317,166	1,205,021
	%	
Operating profit margin (percentage of total revenue)	18.9	25.5
	number	
Employment		
Full-time	1,259	1,003
Part-time	50	110
Contract workers	x	x

^r revised

x suppressed to meet the confidentiality requirements of the Statistics Act

1. Industry estimates are based on the surveyed portion and are augmented by administrative data for establishments that were too small to be eligible for sampling. The surveyed portion includes only data for surveyed establishments weighted to represent other establishments that were eligible for sampling but were not selected. The surveyed portion represents approximately 95% of total industry revenue. Due to rounding, components may not add to total.
2. Wholesale revenue included in this table are from film distribution establishments classified under North American Industry Classification System (NAICS) 512120. Wholesaling of pre-recorded videos is a reported as a secondary revenue source. Establishments primarily engaged in in wholesaling pre-recorded video cassettes are classified under NAICS 41445.



Employment Insurance

May 2008 (preliminary)

In May, 457,020 Canadians received regular Employment Insurance benefits, down 5,330 or 1.2% from April. Regular benefit payments totalled \$706.9 million in May.

Compared with May 2007, the number of Canadians receiving regular benefits declined 3.2%. The decline was 2.3% among men, and 4.7% among women.

The number of regular beneficiaries fell in the majority of census metropolitan areas compared with May 2007. The declines were most notable in Saskatoon (-42.6%) and Regina (-32.9%). Among those CMAs where the number of regular beneficiaries went up, Oshawa (+54.5%), St. Catharines–Niagara (+25.8%) and London (+19.3%) had the largest year-over-year increases.

Note: The annual revision to the seasonally adjusted series has been completed back to January 2005 with this release. Unadjusted series are not affected by this revision.

Estimates of regular beneficiaries by census metropolitan area and by census agglomeration are now available on CANSIM back to January 1997.

Employment Insurance Statistics Program data are produced from an administrative data source and may, from time to time, be affected by changes to the *Employment Insurance Act* or administrative procedures. The number of beneficiaries is a measure of all persons who received Employment Insurance benefits from the 11th to the 17th of the month. This coincides with the reference week of the Labour Force Survey. The regular benefit payments figure measures the total of all monies paid to individuals during the month.

Available on CANSIM: tables 276-0001 to 276-0006, 276-0009, 276-0011, 276-0015 and 276-0016.

Definitions, data sources and methods: survey number 2604.

Data on Employment Insurance for June will be released on August 26.

For general information or to order data, contact Client Services (613-951-4090; toll-free 1-866-873-8788; labour@statcan.ca). To enquire about the concepts, methods or data quality of this release, contact Peter Lorenz (613-951-4167), Labour Statistics Division. □

Employment Insurance statistics

	May 2008	April 2008	May 2007	April to May 2008	May 2007 to May 2008
Seasonally adjusted					
				% change	
Regular beneficiaries	457,020 ^P	462,350 ^r	469,990	-1.2	-2.8
Regular benefits paid (\$ millions)	706.9 ^P	690.9 ^r	670.4	2.3	5.4
Initial and renewal claims received (thousands)	213.8 ^P	221.3 ^r	221.0	-3.4	-3.3
Unadjusted					
All beneficiaries (thousands) ¹	651.0 ^P	783.6 ^P	666.7		
Regular beneficiaries (thousands)	407.0 ^P	518.3 ^P	420.5		-3.2
Men (thousands)	254.2 ^P	342.5 ^P	260.2		-2.3
Women (thousands)	152.8 ^P	175.8 ^P	160.4		-4.7
Initial and renewal claims received (thousands)	151.4	179.9	166.2		
Payments (\$ millions)	1,068.4	1,410.4	1,056.8		
Year-to-date (January to May)					
			2008	2007	2007 to 2008
					% change
Claims received (thousands)			1,003.1	1,048.2	-4.3
Payments (\$ millions)			6,811.6	6,898.4	-1.3

^r revised

^P preliminary

1. "All beneficiaries" includes all claimants receiving regular benefits (for example, as a result of layoff) or special benefits (for example, as a result of illness) and are representative of data for the Labour Force Survey reference week, which is usually the week containing the 15th day of the month.

Number of beneficiaries receiving regular benefits

	May 2008 ^P	April to May 2008	May 2007 to May 2008
Seasonally adjusted			
		% change	
Canada	457,020	-1.2	-2.8
Newfoundland and Labrador	35,370	0.0	-0.6
Prince Edward Island	7,890	3.8	-0.9
Nova Scotia	27,070	4.8	-4.0
New Brunswick	29,910	0.9	-1.6
Quebec	155,360	-2.0	-7.5
Ontario	133,500	1.2	7.0
Manitoba	9,270	-2.2	-11.4
Saskatchewan	7,090	-5.7	-27.7
Alberta	14,760	-8.8	-15.1
British Columbia	37,280	-3.7	-1.1
Yukon	710	-2.7	-9.0
Northwest Territories	650	-1.5	3.2
Nunavut	270	-10.0	-27.0

^P preliminary

Note: The number of beneficiaries includes all claimants who received regular benefits for the Labour Force Survey reference week, usually containing the 15th day of the month.

Research and development in the health field

2007 (preliminary)

Spending on research and development (R&D) in health reached \$6.3 billion in 2007, accounting for 21.8% of R&D expenditures.

The higher education sector remained the most important sector performing health R&D, conducting \$4.1 billion worth in 2007, followed by business enterprise sector at \$1.9 billion.

Performing sector

	2007 \$ billions
Federal government	0.2
Provincial governments	0.0 ^s
Business enterprises	1.9
Higher education	4.1
Private non-profit	0.1
Total	6.3

^s value rounded to 0 (zero) where there is a meaningful distinction between true zero and the value that was rounded

In addition to performing the majority of health R&D, the higher education and business enterprise sectors were also the leading funders for health R&D, accounting for just over one-half of the funds dedicated to health in 2007.

The federal government was the third most important funding sector for health R&D, accounting for one-fifth of the funds invested in this field.

The private non-profit sector contributed slightly over \$500 million, while foreign funders invested just over \$800 million.

Funding sector

	2007 \$ billions
Federal government	1.3
Provincial governments	0.4
Business enterprises	1.5
Higher education	1.8
Private non-profit	0.5
Foreign	0.8
Total	6.3

On a per capita basis, health R&D spending increased from \$163 in 2003 to \$192 in 2007.

Definitions, data sources and methods: survey numbers, including related surveys, 4201, 4204, 4208, 4209, 4210, 4212 and 5109.

The article "Estimates of total spending on research and development in the health field in Canada, 1996 to 2007" is now available in the service bulletin *Science Statistics*, Vol. 32, no. 3 (88-001-XWE, free), from the *Publications* module of our website.

For more information, or to enquire about the concepts, methods, or data quality of this release, contact Michael Lynch (613-951-2201; michael.lynch@statcan.ca) or Louise Earl (613-951-2880; louise.earl@statcan.ca), Science, Innovation and Electronic Information Division. ■

Natural gas sales

May 2008 (preliminary)

Cooler than normal temperatures in many regions of the country led to moderate increases in natural gas sales in the residential and commercial sectors in May.

Higher sales volumes were found in all sectors compared with volumes for May 2007. A gain in the commercial sector led the way at 12.7%, followed by gains in both residential (+8.7%) and industrial (including direct) sales (+7.1%).

Natural gas sales volume totalled 5 006 million cubic metres in May, up 8.1% compared with May 2007.

Definitions, data sources and methods: survey number 2149.

For more information, to order data, or to enquire about the concepts, methods or data quality of this release, contact the dissemination officer (toll-free 1-866-873-8789; 613-951-9497; energ@statcan.ca), Manufacturing and Energy Division. □

Natural gas sales

	May 2008 ^P	May 2007	May 2007 to May 2008
	thousands of cubic metres		% change
Total sales	5 006 465	4 629 926	8.1
Residential ¹	913 032	840 309	8.7
Commercial ²	696 652	618 198	12.7
Industrial ³ and direct sales ⁴	3 396 782	3 171 418	7.1

^P preliminary

1. Gas sold for domestic purposes, including space heating, water heating, cooking, to a residential dwelling unit to a residential dwelling unit.
2. Gas sold to customers engaged in wholesale or retail trade, governments, institutions, office buildings, etc.
3. Gas sold to customers engaged in a process that creates or changes raw or unfinished materials into another form or product. Includes mining and manufacturing establishments. Includes firm, interruptible and buy/sell agreements.
4. Represents direct, non-utility, sales for consumption, where the utility acts solely as the transporter solely as the transporter.

Aircraft movement statistics: Major airports

June 2008

Aircraft take-offs and landings at airports with NAV CANADA air traffic control towers and flight service stations edged up 0.6% in June compared with June 2007. These 95 airports reported 566,679 movements in June compared with 563,092 movements in June 2007.

Available on CANSIM: tables 401-0007 to 401-0020.

Definitions, data sources and methods: survey number 2715.

The June 2008 issue of *Aircraft Movement Statistics: NAV CANADA Towers and Flight Service Stations (TP 141)* (51-007-XWE, free) is now available from the Publications module of our website. This report is a joint publication of Statistics Canada and Transport Canada.

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

contact Client Services (toll-free 1-866-500-8400; transportationstatistics@statcan.ca), Transportation Division.

Investment in new housing construction

May 2008

Data on the investment in new housing construction (including single dwellings, semi-detached dwellings, row housing, apartments and condominiums) are now available for May.

These series are not offered on CANSIM.

Definitions, data sources and methods: survey number 5155.

For more information, to order data, or to enquire about the concepts, methods or data quality of this release, contact Étienne Saint-Pierre (613-951-2025; bdp_information@statcan.ca), Investment and Capital Stock Division.

New products

Aircraft Movement Statistics: NAV CANADA Towers and Flight Service Stations (TP 141), June 2008
Catalogue number **51-007-XWE**
(free).

Science Statistics, July 2008 edition, Vol. 32, no. 3
Catalogue number **88-001-XWE**
(free).

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

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