



# Infomat

## A Weekly Review

Friday, May 21, 1999

### OVERVIEW

#### ◆ Composite index shows improving growth

The growth of the leading indicator continues to improve. In April it gained 0.7%. This followed advances of 0.5% in March and 0.4% in February. The upturn is largely explained by the rebound in the financial markets.

#### ◆ Most consumer spending is auto-related

In 1998, consumers spent more in retail stores on motor vehicles and related products than they did on food, clothing and footwear combined.

#### ◆ Sales rebound for new motor vehicles

Buoyed by strong truck sales, total sales of new vehicles rose 6.3% in March. The sales gains were seen in all provinces except Saskatchewan.

#### ◆ Large retailers captured market share in 1998

In 1998, a group of about 80 large retailers gained ground on the rest of the retail stores in terms of their share of the retail trade market. Three product lines accounted for most of the large retailers' sales.

#### ◆ Majority of taxfilers saving for retirement

Between 1991 and 1997, 7 out of every 10 taxfilers aged 25 to 64 saved for retirement by contributing to either a registered retirement savings plan (RRSP) or an employer-sponsored registered pension plan (RPP). Almost all who did not use these programs to save had an income less than \$20,000, and more than half were women.

#### Composite index shows improving growth

The growth of the leading indicator continues to improve. In April it gained 0.7%. This followed advances of 0.5% in March and 0.4% in February. The upturn is largely explained by the rebound in the financial markets, without which the leading indicator's growth would have remained steady at about 0.5% since the start of this year.

For a second straight month in April, the improvement in the stock market was led by natural resources stocks. Their turnaround reflected improved prices on global commodity markets. Rising stock market prices were also a principal factor in the recent upturn of the U.S. leading indicator.

Canadian manufacturers in recent months have been using inventories to make shipments. In April, this boosted the ratio of shipments to inventories for a fourth straight month. Meanwhile, new orders posted the largest of seven consecutive increases, but this growth was dominated by orders for aircraft, whose production is spread out over long periods of time. The average workweek was stable for a third month in a row.

Household demand remained uneven. A slowdown in services employment reflected slack consumer demand in this sector. Conversely, spending on goods continued to improve across the board. The housing index rose for a second straight month, as starts of single-family homes increased following the upturn that occurred earlier this year in the market for existing homes.

Available on CANSIM: matrix 191.

The May 1999 issue of *Canadian economic observer* (11-010-XPB, \$23/\$227) is now available. For further information, contact Francine Roy (613-951-3627), Current Economic Analysis Group. See also "Current trends" on page 6.

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## Most consumer spending is auto-related

In 1998, consumers spent more in retail stores on motor vehicles and related products than they did on food, clothing and footwear combined. Out of every \$100 of retail spending, Canadians spent \$35.00 on motor vehicles and related products, \$19.44 on food and \$9.89 on clothing and footwear. These proportions were about the same as in 1997.

The fourth largest category was home furnishings and electronics, which took \$7.31 of every \$100 spent by consumers. Purchases of prescription and over-the-counter drugs took \$3.99, slightly outpacing the \$3.83 spent on sporting and leisure goods. Consumers spent \$3.22 out of every \$100 on alcoholic beverages, compared with \$2.37 on tobacco products and supplies.

In total, spending in retail stores reached \$246.8 billion in 1998, up 3.6% from 1997. Consumers spent about \$86.4 billion on motor vehicles and related products. Roughly \$59.3 billion was spent on food and beverages.

Of the auto-related sales, about 42% went to new vehicles—cars, trucks, minivans or sport utility vehicles, including leased vehicles at their full selling price, not at the monthly lease rate. Another 18% was spent on used vehicles, 18% on gas and oil, 13% on parts, and 10% on service.

Canadians spent \$16.6 billion in 1998 on health and personal care products. These include cosmetics, drugs (prescription and over-the-counter), vitamins, eyewear, and other toiletries. Drugstores captured 61.8% of the market for these products. However, consumers chose to buy \$6.3 billion worth of these products at other types of retail stores. Food stores achieved a market share of 15.8% (\$2.6 billion), while general merchandise stores got 14.6% (\$2.4 billion).

Sales of tobacco products and supplies last year totalled \$5.8 billion. Most of that (61.1%) was bought at food stores (includes supermarkets and convenience stores). By contrast, drugstores laid claim to 6.6% (\$387.5 million) of the tobacco market. The rest was purchased mainly at general merchandise stores, gas stations and duty-free outlets.

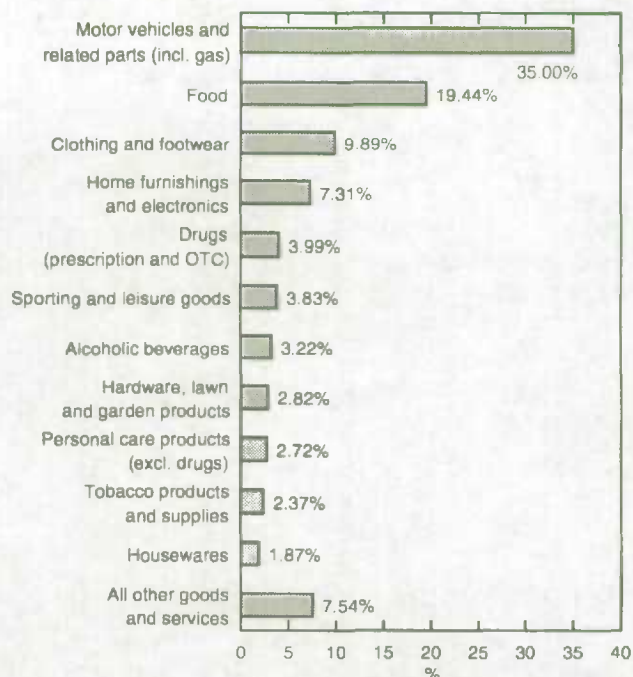
Drugstores today are selling a widely diversified selection of products. In 1998, consumers bought \$855 million of food and beverages at their local drugstore, mostly in the form of candy and snacks (\$493 million). They also bought \$353 million of home furnishings and electronics (still cameras and related products for example), \$329 million of housewares (mostly cleaning supplies), \$125 million of newspapers, magazines and books, \$30 million of women's hosiery and \$22 million of jewellery and leather goods.

Analysis of the market share of certain retail outlets from one quarter to another shows shifts in consumer shopping patterns. For example, consumer shopping preferences shift slightly near Christmas. In the fourth quarter of 1998, Canadians bought the

### Note to readers

The Quarterly Retail Commodity Survey provides quarterly estimates, at the national level, of the goods and services sold at various types of retail stores. These data reveal the type of retail outlets where consumers prefer to buy these goods and services, as well as shifts in consumer preferences. The quarterly survey works in conjunction with the Monthly Retail Trade Survey, which provides total sales estimates by type of retail store. The quarterly data have not been adjusted for seasonal factors.

Retail sales by commodity in 1998



majority (55.2%) of their home furnishings and electronics from a specialty store. However, department stores gained ground during the holiday period for these items, accounting for 20.3% of their sales, up from 16.7% in the third quarter of 1998. Other general merchandise stores, in combination with home and auto supply stores, also made gains. Their market share for home furnishings and electronics rose from 11.8% in the third quarter to 14.1% in the fourth.

To order data, contact Client Services (613-951-3549; 1 877 421-3067; [retailinfo@statcan.ca](mailto:retailinfo@statcan.ca)). For further analytical information, contact Leslie Kiss (613-951-3556), Distributive Trades Division.



## Sales rebound for new motor vehicles

**B**uoyed by strong truck sales, total sales of new motor vehicles rebounded 6.3% in March to 125,209 units. This increase followed a drop in February of 3.9%. March's robust sales continued the upward trend that started in the fall of 1998. New motor vehicle sales were 5.3% higher this March than they were in March 1998.

The strong sales of new trucks in March also gave a boost to the first-quarter results. Overall, sales of new vehicles in the first quarter of 1999 reached 365,565 units. This represented a gain from the previous quarter of 4.2% and an increase from the year-earlier quarter of 8.9%.

New truck sales in March totalled 61,193 units, a surge from February of 11.1%. This increase followed a substantial sales decline in February (-6.9%). Since the start of 1999, truck sales have recovered from the downward trend of 1998. Sales of cars, meanwhile, grew a moderate 2.1% in March, to 64,015 units. This marked a turnaround after three straight months of sales declines.

Vehicles built in North America accounted for 86.9% (unadjusted data) of the new vehicles sold in March, up from 85.1% in March 1998. More specifically, the market share of North American-built cars rose from 78.5% to 80.9%. This share had fallen below 80% for most of 1998. For cars assembled overseas, market share declined from 21.5% in March 1998 to 19.1% in March 1999. And for North American-built trucks, the market share rose from 92.3% of sales to 93.1%. Generally, North American-built trucks have held onto more than 90% of the new truck market since 1994.

### Note to readers

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

New vehicles built in North America include those made or assembled in Canada, the United States or Mexico. All other new motor vehicles are considered imports (manufactured overseas).

For reasons of confidentiality, data for the Yukon and Northwest Territories are included with the British Columbia data. Unless otherwise noted, all data are seasonally adjusted.

Overall, new vehicle sales advanced compared with March 1998 (unadjusted data) in all provinces except Saskatchewan (-2.0%). For a second month in a row, dealers in Newfoundland posted the strongest year-over-year sales growth (+25.6%). Dealers also showed robust sales growth in Ontario (+18.2%), Manitoba (+12.7%) and Prince Edward Island (+10.4%).

In the first quarter, dealers in Newfoundland also posted the best sales growth, both for new cars (+20.6%) and for new trucks (+19.1%). The only quarterly decline in new vehicle sales was also recorded by dealers in Saskatchewan (-4.5%).

**Available on CANSIM: matrix 64.**

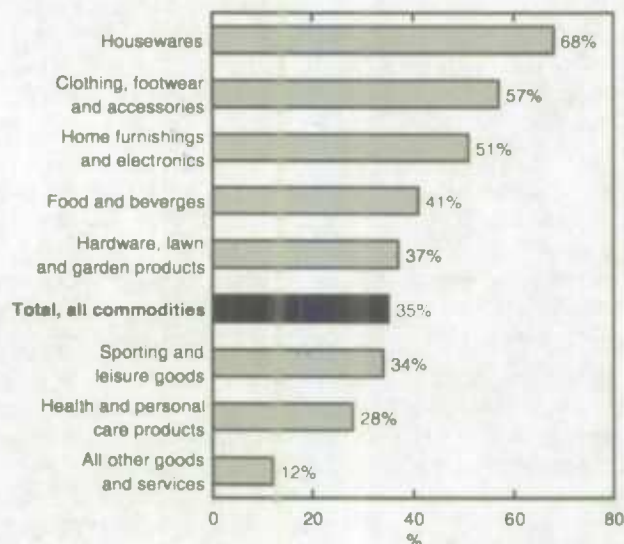
The March 1999 issue of *New motor vehicle sales* (63-007-X1B, \$13/\$124) can be downloaded from the Internet at [www.statcan.ca](http://www.statcan.ca). To order data, or for general information, contact Client Services (613-951-3549; 1 877 421-3067; [retailinfo@statcan.ca](mailto:retailinfo@statcan.ca)), Distributive Trades Division. For analytical information, contact Cl rance Kimanyi (613-951-3592; [kimacle@statcan.ca](mailto:kimacle@statcan.ca)), Distributive Trades Division.

## Large retailers captured market share in 1998

**I**n 1998, a group of about 80 large retailers gained ground on the rest of the retail stores in terms of their share of the retail trade market. The large retailers' sales reached \$68.0 billion, an advance from 1997 of 8.0%. By comparison, sales at the rest of the country's retailers were flat last year. As a result, large retailers accounted for about 35% of total retail trade in 1998, up from the year before by about 33%. (The comparisons exclude motor and recreational vehicle dealers.) On a monthly basis, the large retailers continued their year-over-year sales growth in February, growing by a strong 6.0%.

The large retailers are favoured by consumers for housewares and clothing. For every dollar Canadians spent on housewares in 1998, 68 cents went into the cash registers of one of the large retailers surveyed. (Housewares include such items as cookware, tableware, household cleaning supplies, food wraps, brooms, etc.) These large retailers also received 57 cents of every dollar spent last year on clothing, footwear and accessories, and 51 cents of every dollar spent on home furnishings and electronics.

Market share of the large monthly retailers in 1998



(continued on page 4)



### ... Large retailers captured market share in 1998

Consumers bought 41% of their food and beverages, 37% of their hardware, lawn and garden supplies, and 34% of their sporting and leisure goods at one of the large retailers. As well, nearly 30% of all health and personal care products sold in 1998 were bought from them.

Just three product lines, taken together, represented 70% of all the items sold by the large retailers—food and beverages; clothing, footwear and accessories; and home furnishings and electronics. As the table shows, the biggest winners within the group of large

### Sales growth for the group of large retailers

Not seasonally adjusted

	1997 to 1998	February 1998 to February 1999
	% change	
<b>Commodities, total</b>	<b>6.2</b>	<b>4.7</b>
Food and beverages	8.5	6.7
Health and personal care products	8.2	7.0
Housewares	13.8	19.6
Clothing, footwear and accessories	8.1	9.6
Home furnishings and electronics	12.4	0.6
Hardware, lawn and garden products	12.0	4.3
Sporting and leisure goods	5.6	-0.2
All other goods and services	8.0	6.0

#### Note to readers

The Monthly Survey of Large Retailers provides a breakdown of sales on the basis of commodities (more than 100) at the national level for a group of about 80 large retailers. A full list of who is included in the survey is available upon request.

Data have not been adjusted for seasonal factors or for changes due to differences in the number or significance of shopping days contained in the various months of the year. For example, the number of Saturdays (normally a heavy shopping day) may differ from month-to-month or year-to-year.

retailers, in terms of year-over-year sales growth, were health and personal care products, housewares, and hardware, lawn and garden products.

In February (the latest month of data), the health and personal care products category was again the top performer, with year-over-year sales surging 19.6%. Housewares also showed a notable year-over-year sales gain (+9.6%). The large retailers' February sales reached \$4.5 billion, up 6.0% or \$254 million compared with February 1998. In contrast, sales for total retail trade (excluding motor and recreational vehicle dealers) increased just 2.5%.

To order data, contact Client Services (613-951-3549; 1 877 421-3067; [retailinfo@statcan.ca](mailto:retailinfo@statcan.ca)). For further analytical information, contact Veronica Utovac (613-951-0669), Distributive Trades Division.

## Majority of taxfilers saving for retirement

Between 1991 and 1997, 70% of taxfilers aged 25 to 64 saved for retirement by contributing to either a registered retirement savings plan (RRSP) or an employer-sponsored registered pension plan (RPP). Slightly more than half of taxfilers saved for retirement regularly (in four or more of the seven years analyzed).

Among the 30% of taxfilers who do not use these programs to save for retirement, almost all had an income less than \$20,000. More than half (60%) of the non-savers were women. That ongoing non-participation in RRSPs and RPPs will mean that public pension programs, such as the Old-Age Security/Guaranteed Income Supplement and the Canada and Quebec Pension Plans, may become their major source of income during retirement.

As income rises, so does the likelihood of saving through RRSPs or RPPs. Specifically, 8 out of 10 individuals with an income between \$30,000 and \$40,000 saved regularly for retirement between 1991 and 1997. Virtually all taxfilers with an income greater than \$40,000 did so as well. Individuals with an income of \$50,000 or more (about 15% of taxfilers) were the most likely to be consistent savers.

#### Note to readers

This article analyzes the retirement savings behaviour of taxfilers between 1991 and 1997 in terms of their contributions to registered retirement savings plans (RRSPs) and/or their participation in employer-sponsored registered pension plans (RPPs). This analysis is restricted to individuals aged 25 to 64. Including those younger and older could distort the picture, as many under 25 have not entered the labour force or are fairly recent entrants, and many over 64 have already retired.

References to the frequency of savings from 1991 to 1997 are based on individuals who filed a tax return in each of the seven years and who were aged 25 to 64 as of December 31, 1997. Income was averaged over the seven-year period. On the other hand, references to the number of savers or amounts saved in any one year are based on the returns of all taxfilers aged 25 to 64 as of December 31 of that year. Annual total income and all other dollar figures were converted to 1997 dollars.

Age has a less direct connection than income does to saving for retirement. Between 1991 and 1997, about 62% of taxfilers aged 45 to 54 were regular savers—that is the highest proportion of any age group. The youngest age group (25 to 34 years) was least likely to have saved for retirement: 35% of this group did not participate at all in these programs during the seven-year period. However, it is worth noting that a taxfiler in this age group could have been as young as 18 in 1991.

(continued on page 5)

### ... Majority of taxfilers saving for retirement

At each income level up to \$60,000, women were more likely than men to have saved regularly in at least one of the two retirement savings programs between 1991 and 1997. However, on the whole, men were more likely to belong to an RPP or to contribute to an RRSP: just over 58% of men saved regularly between 1991 and 1997; only 46% of women did. Partly, this can be attributed to the large proportion (53%) of women with an income less than \$20,000—the income group least likely to participate in these programs.

The contributions to RRSPs are often sporadic. Between 1991 and 1997, slightly more than 40% of all taxfilers aged 25 to 64 made no RRSP contributions; most (84%) of these individuals had an income less than \$30,000. Another 25% of taxfilers contributed only occasionally (in one, two or three years). Only 35% of taxfilers contributed to an RRSP regularly during the period studied.

The number of taxfilers who contributed to an RRSP increased from 4.3 million in 1991 to 5.6 million in 1997 (+30%), whereas participation in an RPP declined slightly from 4.7 million to 4.5 million (-4%). Because of this growth in RRSP contributors, the \$22.8 billion contributed to RRSPs in 1997 by those aged 25 to 64—just 12% of their total RRSP room for that year—represented 55% of the savings made through both RRSPs and RPPs. This was up from 42% in 1991.

*Data on retirement savings through RRSPs and RPPs are available at no charge at [www.statcan.ca](http://www.statcan.ca). Look under "Canadian statistics" followed by "Labour, employment, and unemployment", and then click on "Employment, insurance and pensions". The publication titled **Retirement savings through RPPs and RRSPs, 1991 to 1997** (74F0002X1B) is also now available. For further information, contact Client Services (613-951-7355; 1 888 297-7355; fax: 613-951-3012; [income@statcan.ca](mailto:income@statcan.ca)), Income Statistics Division.*

## New from Statistics Canada



### Labour force update: Employment by industry and occupation based on new classifications Spring 1999

This issue of *Labour force update* introduces the two new classification systems that are now being used by the Labour Force Survey: one for occupations and one for industries. Occupations are now being classified according to the 1991 Standard Occupational Classification (SOC 1991), which replaced the old SOC 1980 system. As for industries, the Labour Force Survey is one of the first programs at Statistics Canada to release data under the new North American Industry Classification System (NAICS). This issue of *Labour force update* examines these new occupation and industry groups, providing a profile of employment and an analysis of trends.

Each quarter, *Labour force update* features the latest information and trends relating to a particular labour market issue. Its informative commentary, charts and tables provide concise and up-to-date information—a useful starting point for further research.

*The Spring 1999 issue of **Labour force update** (71-005-XPB, \$29/\$96) is now in print. Information on the new classification systems is also available electronically at [www.statcan.ca](http://www.statcan.ca). Look under "In depth". For further information about the product, contact Jeannine Usalcas (613-951-4720; fax: 613-951-2869; [usaljea@statcan.ca](mailto:usaljea@statcan.ca)), Labour Statistics Division.*

### Computer use and Internet use by rural households

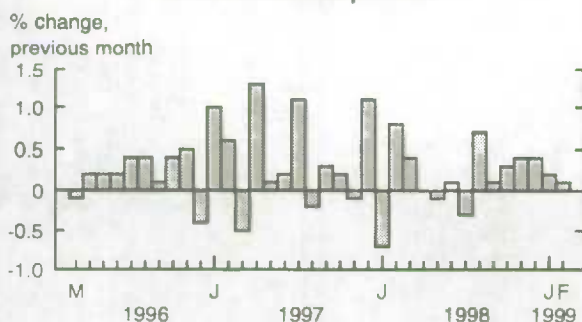
This new report on computer use and Internet use by members of rural households is the seventh in Statistics Canada's series of analytical bulletins that profile trends in rural Canada. The series is published in collaboration with the Rural Secretariat, Agriculture and Agri-Food Canada.

*The report titled **Computer use and Internet use by members of rural households** (21-006-XIE, no charge) is now available. For further information, contact Ray Bollman (613-951-3747; 1-800-465-1991; fax: 613-951-3868; [bollman@statcan.ca](mailto:bollman@statcan.ca)), Agriculture Division.*



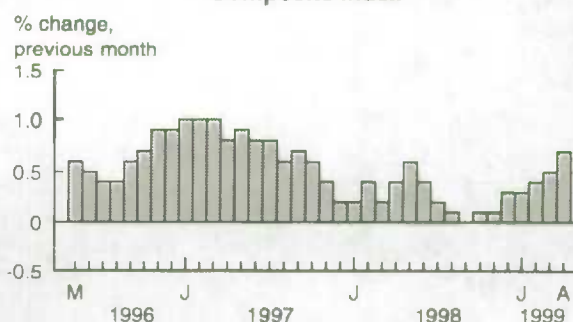
## Current trends

### Gross domestic product



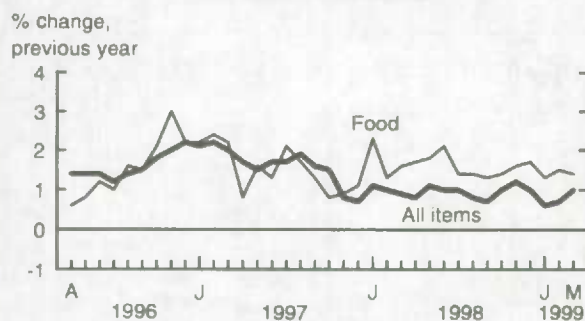
Economic activity advanced a marginal 0.1% in February, the seventh consecutive month of growth.

### Composite Index



The growth of the leading indicator continued to improve, with a gain of 0.7% in April.

### Consumer Price Index



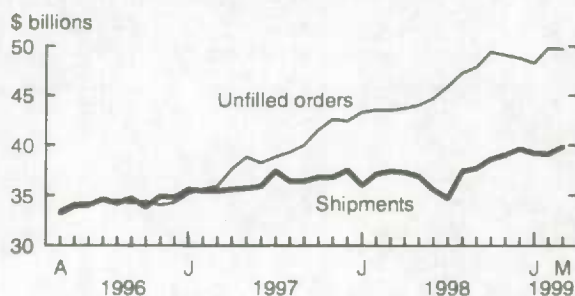
Consumers paid 1.0% more for goods and services in March 1999 than they did a year earlier. Food prices rose 1.4%.

### Unemployment rate



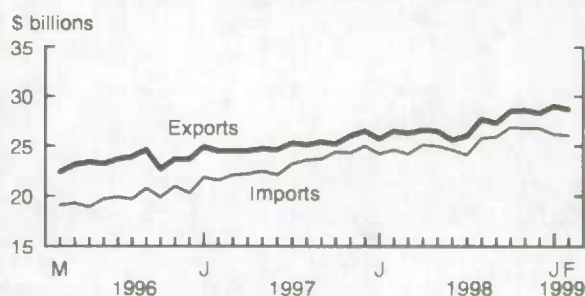
In April, a sharp jump in the number of people looking for work pushed the unemployment rate to 8.3%.

### Manufacturing



Manufacturers' shipments increased 2.0% in March to \$39.8 billion. The backlog of unfilled orders slipped 0.3% to \$49.7 billion.

### Merchandise trade



In February, the value of merchandise exports fell 0.9% from January to \$28.7 billion. Imports declined a slight 0.5% to \$26.1 billion.

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

## Latest statistics

	Period	Level	Change, previous period	Change, previous year
<b>GENERAL</b>				
Gross domestic product (\$ billion, 1992)	February	730.6	0.1%	2.4%
Composite Index (1981=100)	April*	212.9	0.7%	4.1%
Operating profits of enterprises (\$ billion)	Q4 1998	28.7	15.1%	- 1.0%
Capacity utilization (%)	Q4 1998	82.5	0.7†	- 0.9†
<b>DOMESTIC DEMAND</b>				
Retail trade (\$ billion)	February	21.0	- 0.4%	3.8%
New motor vehicle sales (thousand of units)	March*	125.2	6.3%	5.3%
Wholesale trade (\$ billion)	March*	29.3	0.8%	5.2%
<b>LABOUR</b>				
Employment (millions)	April	14.65	0.1%	2.6%
Unemployment rate (%)	April	8.3	0.5†	- 0.1†
Participation rate (%)	April	66.0	0.4†	0.9†
Labour income (\$ billion)	January	39.3	- 0.2%	2.6%
Average weekly earnings (\$)	February	607.97	0.2%	0.1%
Help-wanted Index (1996=100)	April	150	5.6%	1.4%
<b>INTERNATIONAL TRADE</b>				
Merchandise exports (\$ billion)	February	28.7	- 0.9%	8.4%
Merchandise imports (\$ billion)	February	26.1	- 0.5%	6.0%
Merchandise trade balance (all figures in \$ billion)	February	2.6	- 0.1	0.8
<b>MANUFACTURING</b>				
Shipments (\$ billion)	March*	39.8	2.0%	6.4%
New orders (\$ billion)	March*	39.7	- 2.3%	5.9%
Unfilled orders (\$ billion)	March*	49.7	- 0.3%	14.2%
Inventory/shipments ratio	March*	1.25	- 0.02	- 0.04
<b>PRICES</b>				
Consumer Price Index (1992=100)	March	110.7	0.4%	1.0%
Industrial Product Price Index (1992=100)	March	119.7	0.8%	1.4%
Raw Materials Price Index (1992=100)	March	107.0	5.5%	- 2.9%
New Housing Price Index (1992=100)	March	100.5	0.2%	0.6%

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

\* new this week

† percentage point

## Infomat

### A weekly review

Published by the Communications Division, Statistics Canada, 10th floor, R.H. Coats Bldg., Ottawa, Ontario, K1A 0T6.

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Price per issue: paper version, \$4; Internet version, \$3. Annual subscription: paper version, \$145; Internet version, \$109. Prices outside Canada are the same, but are in U.S. dollars. All prices exclude sales tax.

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## Publications released from May 13 to 19, 1999

Division/Title of publication	Period	Catalogue number	Price: Issue/Subscription	
			Canada (C\$)	Outside Canada (US\$)
<b>AGRICULTURE</b>				
Rural and small town Canada analysis bulletin, Vol. 1, no. 7: Computer use and Internet use by members of rural households	1997	21-006-XIE	no charge	
<b>CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS</b>				
Touriscope, Vol. 15, no. 3: International travel, advance information	March 1999	66-001-PPB	8/73	8/73
<b>HOUSEHOLD SURVEYS</b>				
Labour force update: Employment by industry and occupation based on new classifications	Spring 1999	71-005-XPB	29/96	29/96
<b>INDUSTRIAL ORGANIZATION AND FINANCE</b>				
Quarterly financial statistics for enterprises	Fourth quarter 1998	61-008-XPB	35/114	35/114
<b>INDUSTRY MEASURES AND ANALYSIS</b>				
Gross domestic product by industry	February 1999	15-001-XPB	15/145	15/145
<b>LABOUR STATISTICS</b>				
Employment, earnings and hours	February 1999	72-002-XPB	32/32	32/320
<b>MANUFACTURING, CONSTRUCTION AND ENERGY</b>				
Construction-type plywood	March 1999	35-001-XIB	5/47	
Particleboard, oriented strandboard and fibreboard	March 1999	36-003-XIB	5/47	
Primary iron and steel	March 1999	41-001-XIB	5/47	
Shipments of solid fuel burning heating products	First quarter 1999	25-002-XIB	6/19	
<b>PRICES</b>				
Industry price indexes	March 1999	62-011-XPB	22/217	22/217

Catalogue numbers with an -XIB or an -XIE extension are Internet versions (B signifies bilingual, E signifies English); those with -XMB or -XME are microfiche; and -XPB or -XPE denote the paper version. XDB means the electronic version on diskette or compact disc.

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