Friday, September 1, 2000

# **OVERVIEW**

# Unionization rises in the private sector

During the first half of 2000, union membership grew more than paid employment. All of the increase occurred in the private sector. This resulted in a rise in the unionization rate.

#### Canada benefiting from robust American and overseas tourism

In the first quarter, the number of international travellers paying an overnight visit to Canada reached 2.7 million—a record for a first quarter. Factors behind this record were the lasting strength of American tourism and the growth of travel from Europe and Asia.

### Foreign investors buy substantial amount of Canadian equities

In June, foreign investors were heavily buying Canadian equities, while reducing their holdings of Canadian debt instruments for a second straight month.

### Large retailers register a healthy first half

In the first half, large retailers' sales grew 4.9% compared with the same period in 1999. Home furnishings and electronics led the way.

## Average weekly earnings edge up

In June, employees' average weekly earnings edged up only slightly from May. Compared with June 1999, average weekly earnings advanced 2.7%—just short of the 2.9% annual inflation rate seen in June.

### Internet access by cable highest in Western Canada

Roughly one out of every 10 households with an Internet connection in 1999 subscribed to high-speed access by cable. This service is mostly provided by larger cable companies and is most popular in the West.

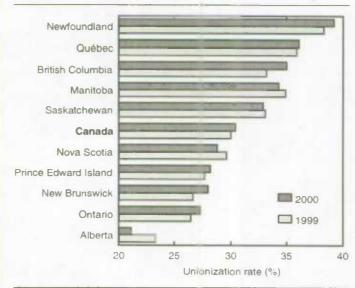
# Unionization rises in the private sector

bout 3.7 million paid workers belonged to a union during the first half of 2000, up from 3.6 million during the same period in 1999. All of the increase occurred in the private sector, where the unionization rate rose from 18.2% to 18.7%. (In the public sector, the rate fell from 70.5% to 69.9%.) Rates rose in 11 of the 16 major industry groups and in 6 of the 10 major occupational groups.

Unionization rates rose in Newfoundland, Prince Edward Island, New Brunswick, Quebec, Ontario and British Columbia. The Prairie provinces and Nova Scotia witnessed declines. Newfoundland remained the most unionized province (39.2% of all paid employees); Alberta had the lowest rate at 21.1%.

In 1999, average hourly earnings of unionized workers were higher than those of non-unionized workers: \$19.43 per hour compared with \$15.99 for full-time workers, and \$16.66 compared with \$9.94 for part-time workers. However, not all of the difference

Unionization rates by province, January-to-June averages



(continued on page 2)



#### ... Unionization rises in the private sector

reflected unionization. Industry, occupation, age, educational attainment and many other factors also determine wage rates.

On average, unionized women who worked full time earned 90% of the hourly wages of their male counterparts. By contrast, unionized women who worked part time earned 9% more than their male counterparts.

Last year, union contract settlements surpassed inflation. In the first four months of this year, however, wage settlements averaged 2.3%—a shade below the inflation rate for the same four-month period (2.5%). In those four months, major wage settlements in the public sector averaged 2.3%, compared with 2.8% in the private sector.

In 1999, an additional 287,000 employees who were not union members occupied jobs covered by collective agreements, so they were entitled to union-negotiated settlements. Among such employees, the chances of not belonging to a union were higher for young employees, workers with short job tenure, those with more education, and workers in managerial, professional and scientific positions. Coverage-only employees were virtually non-existent in nursing and teaching. Last year, over 40% of the coverage-only employees resided in Quebec. Alberta had the next highest share.

This article is based on a report titled "Non-unionized but covered by collective agreement", which includes an appendix titled "Unionization—an update". Both are now available by fax or as a PDF file on Statistics Canada's Web site (www.statcan.ca). Look under "In depth", followed by "Perspectives on Labour and Income". It will also appear in the Autumn 2000 issue of Perspectives on labour and income (75-001-XPE, \$18/\$58), available shortly. For more information, contact Ernest B. Akyeampong (613-951-4624; akyeern@statcan.ca), Labour and Household Surveys Analysis Division.

## Canada benefiting from robust American and overseas tourism

Boosted by the ongoing strength of American tourism and by the growth of tourism from Europe and Asia, 2.7 million international travellers paid an overnight visit to Canada in first quarter, 5.2% more than in the first quarter of 1999. That number was the highest first quarter in the 26 years that international travel data have been collected.

Among the international visitors to Canada from January to March, 78% of them came from the United States. About 2.1 million Americans visited Canada, 4.5% more than in the first quarter of 1999. Most regions of the country enjoyed increased tourism from the United States, particularly the Atlantic provinces (+15.9%), Quebec (+11.9%), Alberta (+8.7%) and Ontario (+3.9%).

American overnight travellers injected \$953 million into the Canadian economy in the first quarter, 6.7% more than in the first quarter of 1999. They spent about \$454 per trip (+2.1%). Their

Top fi	ve overseas	countries	visited b	v Canadians
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	Q1 1999	Q1 2000	Q1 1999 to Q1 2000
	'000 visitors		% change
Mexico	359	411	14.5
United Kingdom	119	135	13.4
Cuba	170	133	-21.8
Dominican Republic	108	120	11.1
France	48	47	-2.1

number of trips to Canada by car grew faster than their trips here by air, a situation not seen since the first quarter of 1997. In the first quarter of this year, Americans took 1.2 million trips by car to Canada, up 7.1%. That compares with 1.6% more trips here by air.

Residents from countries other than the United States made 585,000 trips to Canada in the first quarter (+7.7%). That marked the fifth consecutive increase from the year-earlier quarter. The European and Asian markets spurred much of this growth, as the number of travellers from these two regions climbed 8.7% and 9.2% respectively. In the case of Asia, the increase resulted from a large flow of travellers from Taiwan and South Korea. Traffic to Canada from Asian markets has been rising since the first quarter of 1999.

The number of trips from overseas countries increased for almost all regions, most notably the Atlantic region (+47.7%), followed by Manitoba and Saskatchewan (+11.1%).

Canadians, meanwhile, made 3.2 million overnight trips to the United States in the first quarter (+12.7%). That marked the fourth consecutive increase from the year-earlier quarter. By contrast, Canadian travel to overseas countries declined 3.2% to 1.4 million trips, the third consecutive decline from the year-earlier quarter. The most popular overseas destination for Canadians was Mexico—an all-time high of 411,000 visits (+14.5%). The United Kingdom was the next most popular destination, with 135,000 visits (+13.4%).

Various statistical profiles, tables and micro-data files of the characteristics of international travellers are now available for the first quarter of 2000. To order, contact Michel Campbell (613-951-9169; michel.campbell@statcan.ca). For analytical information, contact Laurie McDougall (613-951-6766; fax: 613-951-2909; laurie.mcdougall@statcan.ca), Tourism Statistics Program.

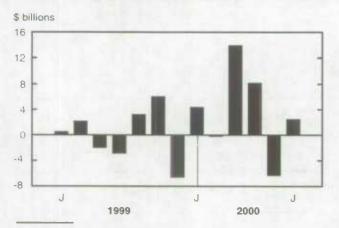
# Foreign investors buy substantial amount of Canadian equities

n June, foreign investors were heavily buying Canadian equities, while reducing their holdings of Canadian debt instruments for a second straight month. Although strong foreign investment continued in existing shares, most of the \$10-billion increase in equities came from new treasury shares issued by Canadian firms that acquired foreign companies. This was the reverse of events in May, when foreign investors reduced their holdings of Canadian portfolio equities, owing to the acquisition of Canadian businesses through share exchanges.

Foreign investors cut their holdings of Canadian bonds in June by \$5.7 billion—the largest monthly reduction so far this year. The driving force was a \$4.3 billion retirement of foreign-held Canadian bonds combined with the near-complete absence of any new Canadian issues in foreign markets.

As well, after accumulating just over \$4 billion worth of Canadian money market paper in March and April, foreign

#### Foreign investment in Canadian securities<sup>1</sup>



1 Includes bonds, stocks and money market paper.

#### Related market information

After narrowing in May to its smallest margin (14 basis points) since September 1999, the differential between the short-term interest rates of Canadian and U.S. government paper jumped to about 25 basis points by end of June, still in favour of investing in the United States. The differential between long-term government bond rates, which favours investment in the United States, remained in the range of 30-to-40-basis points in June.

Canadian stock prices continued to outperform their American counterparts by a wide margin in June (+10.2% versus +2.4%). In the first half, the TSE 300 climbed 21%, compared with virtually no gain in the Standard & Poor's 500.

The Canadian dollar regained in June most of what it lost against the U.S. dollar in May, It gained almost three-quarters of a cent to close June at 67,54 U.S. cents.

investors reversed course and reduced these holdings by almost \$3 billion over May and June. June's \$1.9-billion reduction was concentrated in corporate paper.

Canadian investors, meanwhile, increased their holdings of foreign securities in June by \$1.8 billion, a moderate amount compared with their record investment in May. In June, they acquired a further \$3.1 billion worth of foreign stocks, which was roughly split between U.S. and overseas countries' equities. Each new monthly addition to their equity holdings has established a new annual record, now \$28 billion for the first six months of 2000. This by far surpasses the previous record of \$20.5 billion set for all of 1999.

In the bond market, Canadian investors reduced their holdings of foreign bonds in June by \$1.2 billion—their first significant reduction this year. The bulk of it was U.S. treasuries, a security they heavily purchased over the prior three months.

The June 2000 issue of Canada's international transactions in securities (print: 67-002-XPB, \$18/\$176; online at www.statcan.ca: 67-002-XIB, \$14/\$132) presents the full report. For further information, contact Robert Théberge (613-951-1860), Balance of Payments and Financial Flows Division.

# Large retailers register a healthy first half

n the first half, large retailers' sales grew 4.9% compared with the same period in 1999, increasing to \$34.1 billion. All their major categories of products gained sales. However, clothing, footwear and accessories—their second largest product category—showed only a marginal increase (+0.3%).

In the lead in the first half, home furnishings and electronics recorded solid sales of \$4.5 billion. Of that total, \$1.8 billion was recorded as sales of home electronics, computers and cameras, \$960.1 million was home furnishings (for example, bedding, linens and floor coverings), \$902.2 million was household appliances and \$885.1 million was spent on indoor furniture.

#### Note to readers

The composition of the surveyed group of large retailers changed in 1999. This especially affects the comparisons of sales in the food sector. All comparisons in this article are with the year-earlier period, and all data are unadjusted for seasonal factors.

The "all other goods and services" category (includes gasoline, tobacco, auto parts/accessories and pet food) has also been strong for the large retailers so far this year. The climb in oil prices that has been occurring since early 1999 continued to boost the large retailers' sales figures for gasoline in the first half. Tobacco products/supplies, automotive fuels, oils/additives and auto parts/accessories account for around 65% of sales in the "all other goods and services" category.

(continued on page 4)

#### ... Large retailers register a healthy first half

In June, the large retailers' sales reached \$6.3 billion, up 7.1% from June 1999. All their major categories of products made sales increases. The largest was health and personal care products (+14.9%). Sales of prescription and over-the-counter drugs advanced 23.2%, while sales of personal care products rose 8.4%.

Within the "all other goods and services" category, sales of automotive fuels, oils/additives spiked 43.1% in June, fuelled by higher gasoline prices. In the home furnishings and electronics category, the largest gainers in June were nursery furniture/equipment (+24.9%), still cameras and related photographic

equipment (+20.1%), and telephone/home office equipment (+17.8%).

Robust sales of nursery stock, flowers/potted plants (+27.6%), lawn/garden furniture (+12.8%) and hand/power tools (+12.0%) boosted the hardware, lawn and garden products category in June. A cooler and wetter spring in some parts of the country may have caused consumers to delay purchases of lawn and garden items until June.

To order data, or for general information, contact Client Services (613-951-3549 or 1 877 421-3067; retailinfo@statcan.ca). For further analytical information, contact Catherine Draper (613-951-0669; drapcat@statcan.ca), Distributive Trades Division.

#### Large retailers' sales Not seasonally adjusted

	June 1999	June 2000	June 1999 to June 2000	First half 1999	First half 2000	First half 1999 to First half 2000
Attitibility of Bail	\$ millions		% change	\$ millions		% change
All commodities	5,890	6,309	7.1	32,471	34,074	4.9
Food and beverages	2,040	2,151	5.4	12,175	12,363	1.5
Clothing, footwear and accessories	1,182	1.200	1.6	6,115	6.131	0.3
Home furnishings and electronics	740	814	10.0	4.050	4,534	11.9
Health and personal care products	424	487	14.9	2,474	2,743	10.9
Housewares	261	278	6.5	1,495	1,576	5.4
Sporting and leisure goods	282	297	5.4	1,364	1,456	6.8
Hardware, lawn and garden products	362	396	9.2	1,540	1,630	5.9
All other goods and services	598	685	14.4	3.258	3,641	11.8

## Average weekly earnings edge up

In June, employees' average weekly earnings edged up from May, rising by 71 cents (+0.1%) to \$626.29. Compared with June 1999, average weekly earnings increased by \$16.70 or 2.7%—just short of the 2.9% annual inflation rate seen in June's Consumer Price Index.

From June 1999 to June 2000, employees in all the major industry groups in the goods-producing sector saw substantial growth in average weekly earnings. In the services-producing sector, employees in business services enjoyed the most substantial earnings gains.

For hourly rated employees, average weekly hours were down from May by 0.2 hours to 31.4 hours in June. A decline in overtime hours accounted for part of that decrease. Their average hourly earnings stood at \$15.65, unchanged from May but up 2.6% from June 1999.

In June, the number of employees on payrolls rose slightly (+21,100). Payroll employment gains in finance, insurance and business services were partly offset by losses in construction. By province, the growth in employees on payrolls was concentrated in Ontario, British Columbia and Quebec.

The June 2000 issue of **Employment**, earnings and hours (72-002-XPB, \$32/\$320) presents the month's industry data and other labour market indicators in detail. Custom tabulations of

# Average weekly earnings by industry, June 2000 Seasonally adjusted

	\$	% change, previous month	% change, previous year
All industries	626.29	0.1	2.7
Logging and forestry	834.81	0.0	9.1
Mining, quarrying and oil wells	1,168.77	1.6	4.8
Manufacturing	776.47	-0.7	2.8
Construction	719.37	0.2	4.3
Transportation and storage	748.32	-0.1	0.4
Communications and other utilities	821.93	0.0	0.5
Wholesale trade	669.13	0.5	0.5
Retail trade	374.70	0.5	1.2
Finance and insurance	829.13	-1.0	2.1
Real estate and insurance agencies	646.02	2.3	0.3
Business services	727.21	0.5	4.0
Education-related services	674.02	0.4	2.4
Health and social services	542.44	0.8	3.3
Accommodation, food and beverage	242.65	-0.1	4.1
Public administration	762.91	0.2	2.9
Miscellaneous services	423.30	0.0	3.6

the data are available on demand. For further information, contact Jean Leduc (613-951-4090; labour@statcan.ca), Labour Division.

# Internet access by cable highest in Western Canada

oughly one out of every 10 households with an Internet connection in 1999 subscribed to high-speed access from a cable company. In August 1999, the 61 cable companies that were offering Internet access had 364,081 subscribers to the service, or 5% of the 7.3 million subscribers to their basic cable television services. These subscribers represented about 11% of the 3.3 million households connected to the Internet in Canada.

High-speed Internet access by cable is most popular in Western Canada, home to 34% of all household Internet subscribers. The region accounted for 43% of cable Internet subscribers. By contrast, the Atlantic provinces had 6% of all household Internet subscribers, but only 3% of cable Internet subscribers.

The provision of Internet access by cable is mostly done by the larger cable companies. The industry's top five firms, which own and operate 23 cable licensees, were the first to offer these services, and accounted for 85% of subscribers in 1999. All cable companies that had more than 100,000 subscribers offered Internet access services.

In 1999, revenues from high-speed Internet access by cable reached \$113.2 million, modest when compared with the cable television industry's total revenues of \$3.3 billion. A relatively low revenue-per-subscriber figure—about \$311 per subscriber—indicates significant subscriber growth during 1999.

Most cable companies (345 of 406) did not offer Internet access in 1999, and most had fewer than 10,000 subscribers. Still, the availability of Internet access by cable in small- and medium-sized markets will grow. In 1999, 51 companies operating in such markets provided these services to 68,092 subscribers. Another 67 companies plan to introduce Internet access by cable to their 435,071 basic cable subscribers by August 2001. Assuming conservative 2% per month growth in the number of subscribers from August 1999 to August 2000, the market would expand 76% to about \$200 million.

A more detailed article on this topic will be published in September in the new Connectedness series (56F0004). For further information, contact Daniel April (613-951-3177), Science, Innovation and Electronic Information Division.

## **New from Statistics Canada**



# Canadian travel survey: domestic travel 1998

Throughout 1998, as part of the Canadian travel survey, Statistics Canada interviewed about 180,000 Canadians across the country about their trips in Canada, about themselves and their households. The survey results provide a yardstick for identifying who is travelling, the types of trips they are taking and how much they are spending. The findings help decision-makers in the tourism industry, in business and in government market Canada to Canadians by indicating which marketing strategies, advertising and products to develop.

The 1998 edition of Canadian travel survey: domestic travel (online at www.statcan.ca: 87-212-XIE, \$20; print: 87-212-XPB, \$47) is now available. For more information, contact Danielle Shaienks (613-951-5095; shaidan@statcan.ca), Tourism Statistics Program.

# Radio and television

Revenues of private radio and television broadcasters reached \$2.83 billion in 1999, 3.0% more than in 1998. Their employment decreased slightly to 16,203 last year. Profits before income tax grew 33.0%, largely due to lower programming and general expenses for television broadcasters. Private radio broadcasters realised a modest financial performance in 1999 compared with 1998. Private television broadcasters posted more robust results.

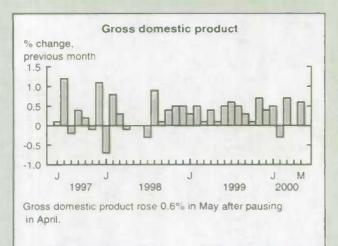
Broadcasting and telecommunications bulletin (online at www.statcan.ca: 56-001-XIB, \$10/\$32), available shortly, presents the details. For more information, contact Daniel April (613-951-3177; daniel.april@statcan.ca) or Joanne Lambert (613-951-6673; joanne.lambert@statcan.ca), Science, Innovation and Electronic Information Division.

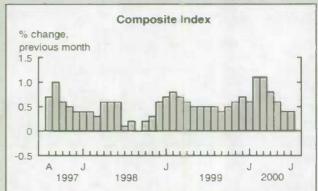
## Rapid growth in biotechnology firms

A new report is available that analyzes the rapid growth in Canada's biotechnology sector. This analysis, which is derived from a study of about 60 biotechnology firms, focuses on factors explaining the rapid growth of a small subset of these firms.

Explaining rapid growth in Canadian biotechnology firms (88F0017MIB, no charge) can be downloaded from Statistics Canada's Web site (www.statcan.ca). Look under "Products and services", choose "Downloadable research papers (free)", then "Science and technology". For more information, contact Antoine Rose (613-951-9919; antoine.rose@statcan.ca) Science, Innovation and Electronic Information Division.

### **Current trends**

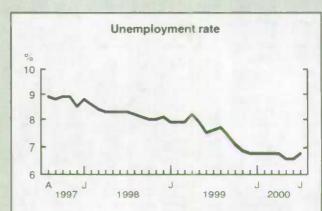




The leading indicator grew by 0.4% in July, the same rate as in june; 6 of 10 components posted gains.



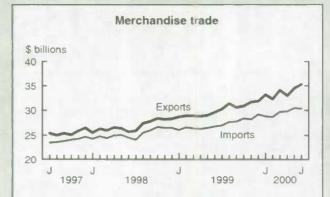
Consumer prices for goods and services were 3.0% higher in July 2000 than they were a year earlier. Excluding food and energy, prices rose 1.5%.



In July, the unemployment rate increased 0.2 percentage points to 6.8%.



Manufacturers' shipments rose 0.7% in June to \$45.1 billion. The backlog of unfilled orders increased 0.6% to \$53.6 billion.



In June, the value of merchandise exports advanced 2.3% from May to \$35.3 billion. Imports edged down 0.4% to \$30.4 billion.

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

	Latest statistics					
	Period	Level	Change, previous period	Change, previous year		
GENERAL						
Gross domestic product (\$ billion, 1992)	June*	783.3	0.4%	4.7%		
Composite Index (1992=100)	July	163.8	0.4%	8.0%		
Operating profits of enterprises (\$ billion)	Q2 2000*	51.9	1.7%	21.6%		
Capacity utilization (%)	Q1 2000	87.6	1.1+	4.3†		
DOMESTIC DEMAND						
Retail trade (\$ billion)	June	22.9	0.8%	6.3%		
Department store sales (\$ billions)	June	1.52	1.5%	2.4%		
New motor vehicle sales (thousand of units)	June	133.9	3.6%	7.5%		
Wholesale trade (\$ billion)	June	32.2	0.3%	8.4%		
LABOUR						
Employment (millions)	July	14.87	-0.1%	2.3%		
Unemployment rate (%)	July	6.8	0.2†	-0.8†		
Participation rate (%)	July	65.6	-0.1†	0.0†		
Average weekly earnings (\$)	June	626.29	0.1%	2.7%		
Help-wanted Index (1996=100)	July	171	1.2%	6.9%		
INTERNATIONAL TRADE						
Merchandise exports (\$ billion)	June	35.3	2.3%	19.5%		
Merchandise imports (\$ billion)	June	30.4	-0.4%	13.3%		
Merchandise trade balance (all figures in \$ billion)	June	5.0	0.9	2.2		
MANUFACTURING						
Shipments (\$ billion)	June	45.1	0.7%	11.4%		
New orders (\$ billion)	June	45.5	3.0%	12.2%		
Unfilled orders (\$ billion)	June	53.6	0.6%	4.1%		
Inventory/shipments ratio	June	1.30	-0.01	0.01		
PRICES						
Consumer Price Index (1992=100)	July	114.1	0.4%	3.0%		
Industrial Product Price Index (1992=100)	July*	127.7	0.2%	4.2%		
Raw Materials Price Index (1992=100)	July*	141.4	-2.4%	19.9%		
New Housing Price Index (1992=100)	June	103.0	0.0%	2.4%		

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

# Infomat A weekly review

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<sup>\*</sup> new this week

<sup>†</sup> percentage point

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Subject area/Title of product	Period	Catalogue number	Price (\$) (issue/subscription)
AGRICULTURE			
Economic overview of farm incomes: Potato farms	August 2000	21-005-XIE	no charge
Field crop reporting series, vol. 79, no. 5: July 31			
estimates of production of principal field crops, Canada	July 31, 2000	22-002-XIB	11/66
Field crop reporting series, vol. 79, no. 5: July 31			
estimates of production of principal field crops, Canada	July 31, 2000	22-002-XPB	15/88
Stocks of frozen meat products	August 2000	23-009-XIE	
The Dairy review	Q1 2000		no charge
The Dairy review	*	23-001-XIB	27/89
The Daily Teview	Q1 2000	23-001-XPB	36/119
CULTURE, TOURISM AND THE CENTRE FOR EDUCATION STATISTICS			
Canadian travel survey: domestic travel	1998	87-212-XIE	20
Canadian travel survey: domestic travel	1998	87-212-XPB	47
DISTRIBUTIVE TRADES			
Retail trade	June 2000	63-005-XIB	16/155
INDUSTRIAL ORGANIZATION AND FINANCE			
Quarterly financial statistics for enterprises	Q1 2000	61-008-XPB	35/114
INTERNATIONAL TRADE			
Canadian international merchandise trade	June 2000	65-001-XIB	14/141
Canadian international merchandise trade	June 2000	65-001-XPB	19/188
Imports by commodity	June 2000	65-007-XPB	78/773
Imports by commodity	June 2000	65-007-XMB	37/361
Imports by country	JanJune 2000	65-006-XPB	124/412
Imports by country	JanJune 2000	65-006-XMB	62/206
MANUFACTURING, CONSTRUCTION AND ENERGY			
Asphalt roofing	July 2000	45-001-XIB	5/47
Electric lamps, light bulbs and tubes	July 2000	43-009-XIB	5/47
Electric power capability and load	1998	57-204-XPB	30
Pootwear statistics	First half 2000	33-002-XIB	6/11
Mineral wool including fibrous glass insulation	July 2000	44-004-XIB	5/47
Particleboard, oriented strandboard and fibreboard	June 2000	36-003-X1B	5/47
Production and disposition of tobacco products	July 2000	32-022-XIB	5/47
Pulpwood and wood residue statistics	June 2000	25-001-XIB	6/55
Sawmills and planing mills	June 2000	35-003-X1B	9/86
METHODOLOGY			
	June 2000	12 001 VDD	49
Survey methodology	June 2000	12-001-XPB	47
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Manadan		ey releases: Se		809882
Monday	Tuesday	Wednesday	Thursday	Friday 1
4	Building permits, July 2000  Rural youth: Stayers, leavers and return migrants, 1991-96*	Help-wanted index, August 2000	7	Labour force survey, August 2000 Industrial capacity utilization rates, Q2 2000
New housing price index, July 2000	Grain stocks, July 1, 2000	13	Consumer price index, August 2000 New motor vehicle sales, July 2000	Travel between Canada and other countries, July 2000
Composite index, August 2000	Monthly survey of manufacturing, July 2000	Canadian international merchandise trade, July 2000 Wholesale trade, July 2000 Employment insurance, July 2000	Retail trade, July 2000  Labour force update: Hirings and separations, 1998-99*	22
Canada's international transactions in securities, July 2000	26	Employment, earnings and hours, July 2000	Industrial product and raw materials price indexes, August 2000	Real GDP at factor cost by industry, July 2000  National tourism indicators, Q2 2000*

Note: Except for the releases marked with an asterisk, all the release dates in this calendar are fixed. A more detailed calendar of fixed release dates for the entire year is available from Statistics Canada's Web site at www.statcan.ca.