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Infomat

A Weekly Review

Friday, May 11, 2001

OVERVIEW

- **Construction intentions down for second straight month**

  The value of building permits declined for a second consecutive month in March (-11.5%), as construction intentions fell in both the residential and non-residential sectors.

- **Fewer manufacturers expect to cut production**

  Even though fewer planned to reduce production in the second quarter, manufacturers were still concerned about the level of orders, and they saw reduced employment prospects.

- **Lowest quarterly increase for services sector in more than two years**

  In the fourth quarter of 2000, the gross domestic product of the services industries rose in real terms by 0.8% from the third quarter. This was the lowest quarterly increase for services in more than two years.

- **Sales of automotive fuels, oils and additives soar**

  In 2000, consumers spent roughly the same amount on motor vehicles, parts and services as they did on food, clothing and footwear combined. Automotive fuels, oils and additives registered the largest year-over-year increase in sales (+25%).

- **Personal income increases all over the country**

  Personal income rose in all provinces and territories in 2000. Alberta, Manitoba and the Northwest Territories recorded gains of at least 7.0%. Labour income surged everywhere except Yukon.

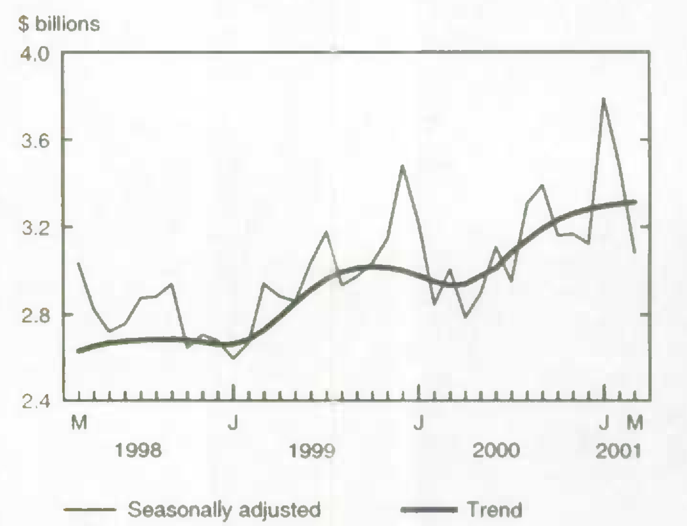
Construction intentions down for second straight month

In March, the value of building permits declined 11.5% to $3.1 billion, down for a second consecutive month. Construction intentions fell in both the residential and non-residential sectors. Despite this retreat, the value of building permits surpassed the $3-billion mark for the eighth consecutive month.

In the residential sector, construction intentions fell 13.5% to only $1.7 billion. Building intentions for multi-family dwellings plunged 26.6% from the peak in February, while those for single-family dwellings declined 7.4%. Despite two consecutive monthly declines, the outlook for the housing market is positive, as full-time employment remains high, mortgage rates are attractive and there are fewer vacant multi-family dwellings on the market.

Provincially, the largest decline in dollar terms occurred in Ontario, where both single-family and multi-family construction intentions fell sharply. The largest advance was in British Columbia, and it was due solely to an increase in the value of permits for multi-family dwellings.

Value of building permits



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... Construction intentions down for second straight month

In the non-residential sector, the value of permits fell 8.8% to $1.4 billion following a decline in February. March's decrease was entirely attributable to a 17.4% drop in commercial projects, notably hotel construction. Industrial building intentions remained unchanged, and institutional intentions increased 9.2%, boosted by the construction of medical facilities.

Value of building permits by census metropolitan area
Seasonally adjusted

	March 2001	February to March 2001	January to March 2001	January-March 2000 to January-March 2001
	$ millions	% change	$ millions	% change
St. John's	12.2	57.9	35.1	-24.3
Halifax	15.6	-38.3	62.3	-38.5
Saint John	5.3	-3.0	15.7	4.6
Chicoutimi–Jonquière	38.8	477.6	51.7	21.8
Québec	47.6	-27.6	183.8	22.4
Sherbrooke	19.4	125.2	35.8	27.8
Trois-Rivières	5.1	-45.7	19.7	-14.1
Montréal	267.2	-24.4	1,208.7	54.8
Hull	22.8	-69.0	122.1	99.4
Ottawa	149.0	19.6	390.9	20.2
Oshawa	34.0	-42.6	122.3	-14.8
Toronto	618.8	-37.9	2,598.0	25.1
Hamilton	60.1	-15.9	235.6	65.3
St. Catharines–Niagara	29.7	4.0	92.3	12.5
Kitchener	39.2	-42.2	163.0	-8.1
London	58.9	97.1	148.1	35.0
Windsor	42.3	-1.1	129.3	9.2
Sudbury	4.4	2.3	12.9	69.2
Thunder Bay	14.5	651.9	25.5	32.1
Winnipeg	38.4	11.0	107.2	-33.3
Regina	10.9	9.0	52.2	-4.6
Saskatoon	30.1	114.7	71.9	-27.6
Calgary	187.7	3.2	528.7	-17.4
Edmonton	109.7	3.1	315.7	3.9
Vancouver	245.0	-4.0	736.5	-0.9
Victoria	33.0	5.4	95.2	55.5

Note to readers

The monthly Building and Demolitions Permits Survey covers 2,500 municipalities, representing 94% of the population. It provides an early indication of building activity. The value of planned construction activities excludes engineering projects (e.g., waterworks, sewers, culverts) and land. The data presented in this article are seasonally adjusted.

Provincially, Ontario reported the largest decline in dollar terms in the non-residential sector in March, due mainly to declines in all three components in the Toronto metropolitan area. The largest increase was in Alberta, where all three components showed increases.

For the first three months of 2001, the value of building permits rose to $10.4 billion, up 14.1% over the same period in 2000. This was the strongest start of any year since 1990. In the residential sector, building intentions rose 9.4% to $5.6 billion, owing in large part to significant increases in multi-family dwelling projects. In the non-residential sector, the value of permits climbed 20.4% to a record $4.7 billion, powered by rises in all three components.

From January to March, the Toronto and Montreal metropolitan areas showed substantial increases in dollar terms on a year-over-year basis, as every component in both the residential and non-residential sectors advanced. In both these regions, construction intentions reached their highest level in the last 10 years for the January to March period.

*The March 2001 issue of **Building permits** (Internet: 64-001-XIE, $19/$186) is now available. To obtain data, contact Vere Clarke (613-951-6556; clarver@statcan.ca). For analytical information, contact Étienne Saint-Pierre (613-951-2025; saineti@statcan.ca), Investment and Capital Stock Division.*

Fewer manufacturers expect to cut production

In April, fewer manufacturers said they expected to decrease production levels further in the next three months. Twenty-seven percent of them stated that they would decrease production in the second quarter, a marked improvement from the 41% who said that they would do so in the first quarter. Prospects for lower production were greatest among manufacturers in the paper and fabricated metal products industries.

However, concern about the current level of unfilled orders continued to mount. In April, 39% of manufacturers reported that unfilled orders were lower than normal, while only 7% reported that levels were higher than normal. Manufacturers in 12 of the 22 major industry groups reported a lower-than-normal backlog of unfilled orders. Manufacturers in the transportation equipment and paper industries reported the highest levels of concern about this.

Note to readers

The Business Conditions Survey is conducted in January, April, July and October; most of the responses are recorded in the first two weeks of these months. Results are based on replies from about 4,000 manufacturers and are weighted by a manufacturer's shipments or employment. Consequently, the responses of larger manufacturers have a larger impact on the results than those of smaller manufacturers. Data in this article are seasonally adjusted, except for the data on production impediments.

Compared with January, manufacturers were less concerned about the current level of orders received. In April, 36% were concerned about declining orders, down 9 percentage points from January. The amount of concern declined in the transportation equipment industry, while it rose among manufacturers of paper and electronic products.

(continued on page 3)

... Fewer manufacturers expect to cut production

With regard to employment prospects, 82% of manufacturers stated that they would keep or add to their work force in the coming quarter. In contrast, 18% said they expected to cut employment. This was especially the case with manufacturers in the electronics, transportation equipment and machinery industries. According to the Labour Force Survey, employment in manufacturing declined by nearly 30,000 jobs in the first three months of the year.

Manufacturers were less concerned about the current level of the finished products inventory. In April, 75% of them said that it was about right, up from 66% in January. The proportion of producers who said their finished products inventories were too high was down 11 percentage points to 20%. February's Survey of Manufacturing reported that finished products inventories were $19.9 billion, up almost $1.9 billion from February 2000.

Few manufacturers reported production impediments in April. Eighty-two percent reported little in the way of production impediments, up 3 percentage points from January. However, a shortage of skilled labour continued to be a concern for 8% of manufacturers.

For more information, contact Claude Robillard (613-951-3507; robilcg@statcan.ca), Manufacturing, Construction and Energy Division.

Manufacturers' expectations and business conditions
Seasonally adjusted

	April 2000	July 2000	October 2000	January 2001	April 2001
	% of manufacturers who said				
Volume of production in next three months will be:					
About the same as in previous three months	54	62	65	43	58
Higher	32	25	19	16	15
Lower	14	13	16	41	27
Orders received are:					
About the same	62	71	70	42	54
Rising	30	17	12	13	10
Declining	8	12	18	45	36
Backlog of unfilled orders is:					
About normal	79	78	71	55	54
Higher than normal	12	10	8	10	7
Lower than normal	9	12	21	35	39
Finished-product inventory is:					
About right	83	82	80	66	75
Too low	3	2	3	3	5
Too high	14	16	17	31	20
Employment in next three months will:					
Change little from previous three months	75	74	71	65	73
Increase	15	16	17	17	9
Decrease	10	10	12	18	18

Lowest quarterly increase for services sector in more than two years

In the fourth quarter of 2000, the gross domestic product of the services industries rose in real terms by 0.8% from the third quarter. Although the services industries did expand more rapidly than the goods industries, where output was virtually unchanged, this was the lowest quarterly increase for services in more than two years.

Services output growth was particularly strong in business services, followed by food and beverage services and amusement and recreation services. However, these gains were somewhat offset by weak growth in health and social services, retail trade and educational services.

The overall services expansion arose partly from higher consumer spending on services. Personal expenditures on services grew in nominal terms by 1.6%, even though the Consumer Price Index for services rose by only 0.1%. Consumer spending was up significantly for recreational services, restaurants and accommodation services and communications services.

The services trade deficit was unchanged at $1.7 billion in the fourth quarter. This quarter did, however, bring a shift in the composition of services trade; declines in the exports and imports of both transportation and travel services were largely offset by a 1.4% increase in the value of commercial services trade.

Employment in services declined by 51,000 in the fourth quarter, a 0.5% decline from the previous quater. In relative terms, however, this decline was slight; in contrast, employment in the goods industries shrank by 3.5%. Service job losses were

(continued on page 4)

... Lowest quarterly increase for services sector in more than two years

up in accommodation and food services and in arts, entertainment and recreation services. These industries were the most adversely affected by colder weather and by less vacation travel to Canadian destinations.

Compared with the fourth quarter of 1999, output in services-producing industries was 4.1% higher, in real terms, in the fourth quarter of 2000. This exceeded the goods industries' 2.8% growth rate. Growth was especially strong in business services. Consumer expenditures on services were 5.9% higher, in nominal terms, over this period. The higher amount of services demanded by consumers combined with an 8.3% increase in Canada's exports of commercial services prompted some of the services output expansion.

Canada's trade deficit in services was $1.7 billion in the fourth quarter, up 23%, or $319 million, compared with the fourth quarter of 1999. Three-quarters of the rise resulted from shifts in the trade of transportation services.

From the fourth quarter of 1999 to the fourth quarter of 2000, about 314,100 services jobs were created, a 2.9% increase and quadruple the rate of increase for the goods industries. More than half of the added services jobs were generated in the retail trade and in the professional, scientific and technical services industries.

The fourth quarter 2000 issue of ***Services indicators*** *(Internet: 63-016-XIB, $26/$87; paper: 63-016-XPB, $35/$116) is now available. For more information, contact Don Little (613-951-6739; littdon@statcan.ca), Services Industries Division.*

Key services indicators, fourth quarter 2000

	Growth since third quarter 2000	Growth since fourth quarter 1999
	%	
Gross domestic product (real)	0.8	4.1
Consumer spending	1.6	5.9
Prices	0.1	2.4
Exports	0.1	5.0
Imports	0.1	6.7
Employment	0.5	2.9

Sales of automotive fuels, oils and additives soar

In 2000, consumer spending in retail stores was $277.9 billion, up 6.3% compared with 1999. Consumers spent roughly the same amount on motor vehicles, parts and services as they did on food, clothing and footwear combined. Out of every $100, they spent $28.85 for motor vehicles, parts and services, compared with $18.98 for food and $9.34 for clothing and footwear.

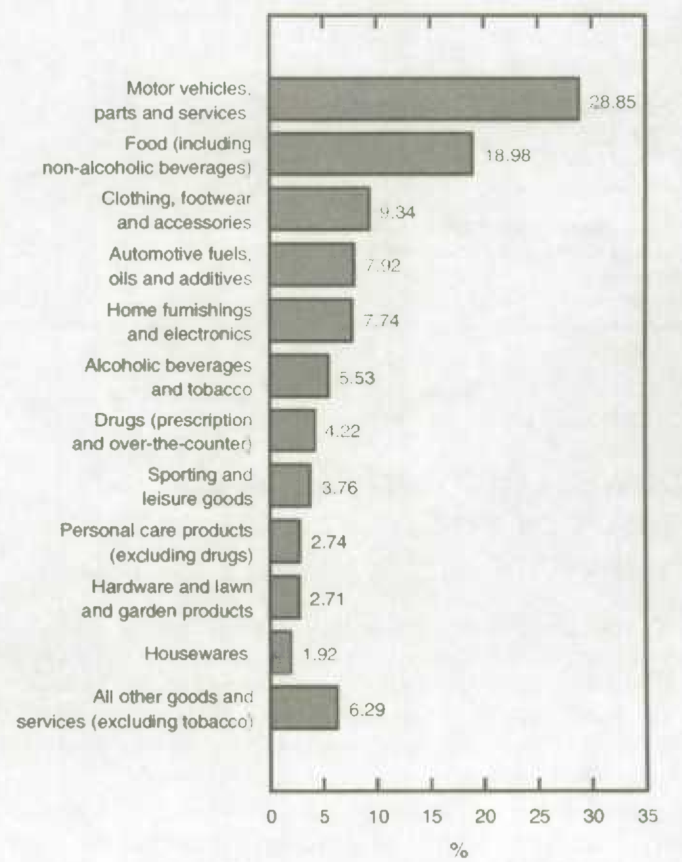
Of all the major commodity groups, automotive fuels, oils and additives recorded the largest year-over-year sales increase. Stimulated by higher gasoline prices, the sales of this group jumped 25% to $22.0 billion.

Home furnishings and electronics recorded the second highest year-over-year sales increase, advancing 9% to $21.5 billion. In this category, the largest gain was in sales of electronic products (+12%), which include telephones, computer hardware and software, and televisions and audio/video equipment. The second largest gain was for indoor furniture (+11%). For appliances (+7%) and other home furnishings (+6%), the sales gain was smaller. (Included in other home furnishings are floor coverings, draperies, bedding and artwork.)

As a result of Christmas shopping, sales for most commodities were the highest in the fourth quarter of 2000. In particular, 49% of toys, games and hobby supplies, 39% of jewellery and watches and 37% of men's clothing were sold in the fourth quarter. However, 45% of purchases of lawn and garden equipment and supplies occurred in the second quarter. Consumers were also more likely to buy a motor vehicle or recreational vehicle in the second quarter. All these patterns are similar to those seen in 1999.

Consumers tended to prefer one-stop shopping at general merchandise stores for their Christmas shopping. In the fourth quarter, these stores gained market share for many popular

Consumer spending shares by commodity group, 2000



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... Sales of automotive fuels, oils and additives soar

Christmas gift items such as: candy, confectionery and snack foods; bicycles; small electrical appliances; hand and power tools; and toys. For example, for candy, confectionery and snack foods, their market share rose from 24% in the third quarter to 31% in the fourth quarter, mostly at the expense of food stores.

For more information, contact Client Services (1 877 421-3067; 613-951-3549; retailinfo@statcan.ca). For analytical information, contact Leslie Kiss (613-951-3556), Distributive Trades Division.

Note to readers

The Quarterly Retail Commodity Survey follows the 1980 Standard Industrial Classification, in which stores that are primarily engaged in selling computer hardware and software, office equipment or building and lumber supplies are classified as wholesale trade.

Personal income increases all over the country

Personal income rose in all provinces and territories in 2000. Alberta, Manitoba and the Northwest Territories recorded gains of at least 7.0%. Ontario and Nunavut also outperformed the national average of 6.1%. Yukon posted the lowest growth, 3.0%.

Labour income surged in all provinces and territories except Yukon, where growth stalled. The generally strong increase came from both employment gains and rising average earnings. The robust 8.5% advance in labour income in Alberta was concentrated in the construction, commercial services and manufacturing industries. Wages and salaries in Ontario and Quebec benefited from federal pay equity payments.

Higher labour income, along with tax cuts, gave an extra boost to personal disposable income in Alberta and Ontario. Manitoba posted growth in excess of 6%, owing to a surge in labour income and a recovery in farm income. The solid growth of disposable income was reflected in strong increases in personal expenditure in all provinces. Alberta posted the best personal expenditure performance, which pushed up retail sales a solid 8.9%.

Farm operators posted variable results in 2000. Manitoba and Saskatchewan felt the effects of continued weakness in grain and oilseed prices, which have been low since 1997. However, net incomes were bolstered by increased payments from farm aid programs, as well as higher revenues for livestock producers as a result of strong demand.

Personal income and expenditure, 2000

	Personal income	Personal expenditure on consumer goods and services
	% change, previous year	
Canada	**6.1**	**5.8**
Newfoundland	4.4	5.1
Prince Edward Island	5.1	6.4
Nova Scotia	4.7	5.4
New Brunswick	4.9	5.0
Quebec	5.7	4.9
Ontario	6.4	6.3
Manitoba	7.0	4.6
Saskatchewan	4.4	5.1
Alberta	7.3	7.5
British Columbia	5.3	5.3
Yukon	3.0	5.3
Northwest Territories	8.5	6.1
Nunavut	6.4	5.3

For more information, contact the information officer (613-951-3640; iead-info-dcrd@statcan.ca), Income and Expenditure Accounts Division.

New from Statistics Canada

Health care in Canada
2001

Health care in Canada 2001 is a new publication that examines Canada's health care system. Jointly released by the Canadian Institute for Health Information and Statistics Canada, the publication includes reports on providers of health care, outcomes of care in hospitals and the cost of health care.

A companion report on how healthy Canadians are examined differences between men and women on attitudes and behaviours toward health. It was released jointly on April 26 as a special issue of the Statistics Canada publication *Health reports*.

The publication ***Health care in Canada 2001*** *is available on the Canadian Institute for Health Information Web site (www.cihi.ca). The companion report on how healthy Canadians are, published in* ***Health reports****, Vol. 12, no. 3 (Internet: 82-003-XIE, free; paper: 82-003-XPE, $20/$58), is available on Statistics Canada's Web site (www.statcan.ca), under "Our products and services," "Free publications" then "Health." For more information, contact Beverley Webster (613-241-7860; bwebster@cihi.ca), Canadian Institute for Health Information, or Kathryn Wilkins (613-951-1769; kathryn.wilkins@statcan.ca), Health Statistics Division, Statistics Canada.*

Income prospects of British Columbia university graduates

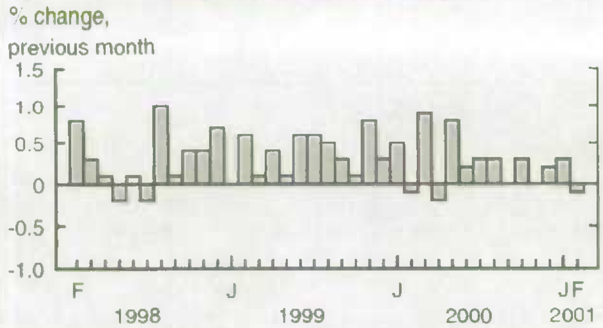
The research study *Income prospects of British Columbia university graduates* examines the annual market income of individuals who obtained bachelor's degrees from universities in British Columbia between 1974 and 1996. This study also examines incomes for graduates in eight major fields of study. It compares the rates of growth of median income in one field, in which people started with lower salaries, with those in another field in which people started with higher salaries.

University graduate data for this study come from university administrative records, while income data come from tax records for the years 1982 to 1997. The analysis used a sample size of more than 700,000 graduates.

The research paper ***Income prospects of British Columbia university graduates****, no. 170, (11F0019MIE01170, free) is available on Statistics Canada's Web site (www.statcan.ca). From "Our products and services" page, choose "Research papers (free)." A printed version of the paper, (11F0019MPE01170, $5) is also available. For more information, contact Andrew Heisz (613-951-3748), Business and Labour Market Analysis Division.*

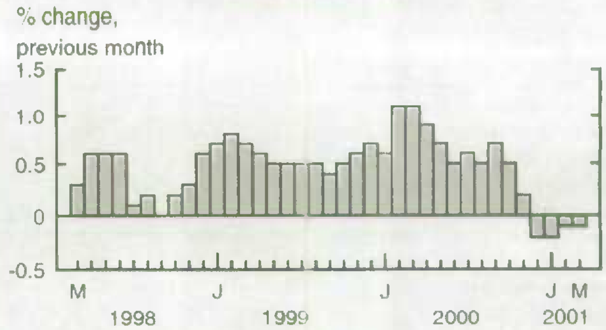
Current trends

Gross domestic product



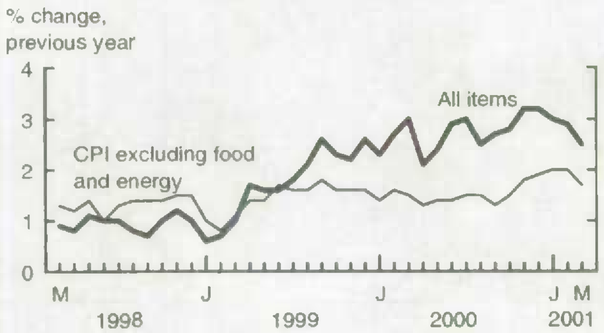
After January's 0.3% gain, gross domestic product slipped 0.1% in February, led by a sharp drop in the production of telecommunications equipment.

Composite Index



The leading indicator edged down 0.1% in March, its fourth straight decline. The stock market and the manufacturing sector remained the main sources of weakness.

Consumer Price Index

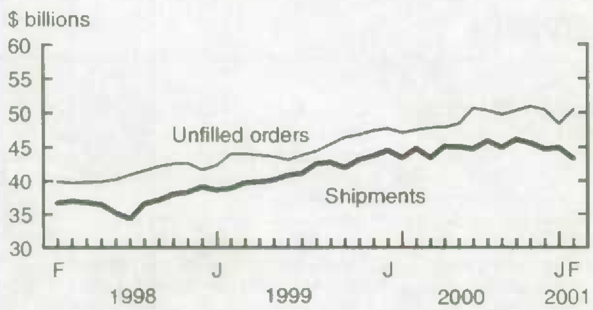


Consumer prices for goods and services were 2.5% higher in March than they were a year earlier. Excluding food and energy, prices rose 1.7%.

Unemployment rate

In March, the unemployment rate edged up 0.1 percentage points to 7.0%, as more people entered the labour force in search of work.

Manufacturing



Manufacturers' shipments fell 3.6% in February to $43.3 billion. The backlog of unfilled orders recovered some lost ground, rising 4.1% to $50.4 billion.

Merchandise trade

In February, the value of merchandise exports declined 4.5% to $35.1 billion. Imports fell for the third straight month, declining 2.8% to $29.3 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 ($ billions, 1992)	February	798.1	-0.1%	3.1%
Composite Index (1992=100)	March	166.6	-0.1%	4.1%
Operating profits of enterprises ($ billions)	Q4 2000	54.0	2.2%	13.9%
Capacity utilization (%)	Q4 2000	85.4	-0.2†	0.7†
DOMESTIC DEMAND				
Retail trade ($ billion)	February	23.6	-0.3%	4.9%
Department store sales ($ billions)	March*	1.63	0.4%	9.4%
New motor vehicle sales (thousands of units)	February	125.6	-4.0%	-3.5%
Wholesale trade ($ billion)	February	31.8	-1.6%	2.3%
LABOUR				
Employment (millions)	March	15.07	0.2%	1.6%
Unemployment rate (%)	March	7.0	0.1†	0.2†
Participation rate (%)	March	66.1	0.1†	0.2†
Average weekly earnings ($)[1]	February	660.22	0.0%	1.9%
Help-wanted Index (1996=100)	April*	168	0.0%	-1.2%
INTERNATIONAL TRADE				
Merchandise exports ($ billions)	February	35.1	-4.5%	8.5%
Merchandise imports ($ billions)	February	29.3	-2.8%	1.9%
Merchandise trade balance (all figures in $ billions)	February	5.9	-0.8	2.2
MANUFACTURING				
Shipments ($ billions)[1]	February	43.3	-3.6%	-0.3%
New orders ($ billions)[1]	February	45.3	5.6%	5.6%
Unfilled orders ($ billions)[1]	February	50.4	4.1%	7.0%
Inventory/shipments ratio[1]	February	1.51	0.07	0.14
PRICES				
Consumer Price Index (1992=100)	March	115.6	0.3%	2.5%
Industrial Product Price Index (1992=100)	March	130.1	0.5%	2.4%
Raw Materials Price Index (1992=100)	March	144.0	-2.1%	1.1%
New Housing Price Index (1992=100)	February	104.9	0.3%	2.4%

Note: *All series are seasonally adjusted with the exception of the price indexes.*
* *new this week*
† *percentage point*
[1] *These estimates are now based on the North American Industry Classification (NAICS). They are not comparable to the previously published estimates based on the Standard Industrial Classification (SIC) of 1980.*

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Products released from May 3 to 9, 2001

SUBJECT AREA Title of product	Period	Catalogue number	Price ($) (issue/subscription)
AGRICULTURE			
Field crop reporting series: Stocks of Canadian grain at March 31, 2001, Vol. 80, no. 3		22-002-XIB	11/66
Field crop reporting series: Stocks of Canadian grain at March 31, 2001, Vol. 80, no. 3		22-002-XPB	15/88
Production of eggs	March 2001	23-003-XPB	110
ANALYTICAL STUDIES			
Income prospects of British Columbia university graduates		11F0019MIE01170	no charge
Income prospects of British Columbia university graduates		11F0019MPE01170	5
Innovation and connectivity: The nature of market linkages and innovation networks in Canadian manufacturing industries		11F0019MIE01165	no charge
Innovation and connectivity: The nature of market linkages and innovation networks in Canadian manufacturing industries		11F0019MPE01165	5
INDUSTRY MEASURES AND ANALYSIS			
Gross domestic product by industry	February 2001	15-001-XIE	11/110
INTERNATIONAL TRADE			
Exports by commodity	February 2001	65-004-XMB	37/361
Exports by commodity	February 2001	65-004-XPB	78/773
INVESTMENT AND CAPITAL STOCK			
Building permits	March 2001	64-001-XIE	14/145
LABOUR STATISTICS			
Employment, earnings and hours	January 2001	72-002-XIB	24/240
MANUFACTURING, CONSTRUCTION AND ENERGY			
Cement	March 2001	44-001-XIB	5/47
Energy statistics handbook	March 2001	57-601-XDE	284
Energy statistics handbook	March 2001	57-601-UPB	387
Industrial chemicals and synthetic resins	March 2001	46-002-XIB	5/47
Pipeline transportation of crude oil and refined petroleum products	February 2001	55-001-XIB	9/86
Production and disposition of tobacco products	March 2001	32-022-XIB	5/47
Supply and disposition of crude oil and natural gas	January 2001	26-006-XPB	19/186

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