

Service bulletin

Specialized Design Services

2010



Highlights

- Operating revenues earned by businesses in the specialized design services industry increased by 6.6% to \$2.8 billion in 2010. The industry's operating expenses grew by 5.1% in the same period, reaching \$2.4 billion. Revenue growth outpaced the growth of the expenses, positively affecting the profit margin, which rose from the previous year's level of 12.0% to 13.2%.
- Specialized design services comprise four industries: graphic design, interior design, industrial design and other specialized design services. The largest industry in the grouping, graphic designers, accounted for almost half (47%) of all specialized design services revenues. Interior designers generated another 38%, followed by industrial designers (9%) and other specialized designers (6%).
- Businesses belonging to these particular industries derive their sales from a combination of design and other related activities.
- Over three-quarters (76%) of the sales of graphic designers were earned from graphic design services, such as advertising and commercial illustration, while the remaining 24% came from other related services, such as website design, printing, and consulting services.
- Interior designers made almost half of their business revenues from residential interior design services (48%), followed by non-residential interior design services at 25%. The residual 27% of their sales was garnered from other activities such as interior decorating services and resale of merchandise.
- Industrial design services, which encompass both product and model design as well as fabrication, received 81% of sales from those activities, while the remaining 19% came from other services, such as drafting or consulting.
- The greatest portion of sales (88%) of other specialized design businesses was generated by fashion design of consumer goods such as clothing, shoes, textiles and jewellery, theatrical set design, costume design, and the design of floats; the rest (12%) was earned from the resale of merchandise.
- Specialized design service industries are concentrated mainly in two provinces. The majority of all revenues were generated in Ontario (51%). Québec accounted for the next largest portion at 19%.



Statistical tables

Table 1

Summary statistics for interior design services, by province and territory, 2008 to 2010

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
2010^p				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	6.5	5.5	2.0	15.8
New Brunswick	5.1	4.4	1.3	14.6
Quebec	168.2	141.7	44.4	15.7
Ontario	552.2	495.9	147.3	10.2
Manitoba	14.6	10.9	4.2	25.4
Saskatchewan	x	x	x	x
Alberta	130.2	113.3	30.1	13.0
British Columbia	169.1	141.7	42.7	16.2
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	1,054.0	919.5	273.7	12.8
2009^r				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	6.1	4.6	1.6	23.2
New Brunswick	4.9	3.8	1.1	22.0
Quebec	158.1	132.0	43.4	16.5
Ontario	506.1	467.6	141.4	7.6
Manitoba	11.5	8.8	3.0	23.3
Saskatchewan	x	x	x	x
Alberta	124.8	111.1	27.6	11.0
British Columbia	142.0	123.0	35.3	13.4
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	960.6	855.9	254.7	10.9
2008				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	5.3	4.4	1.5	18.2
New Brunswick	4.0	3.3	1.0	17.7
Quebec	143.8	118.8	37.3	17.4
Ontario	575.9	527.6	149.1	8.4
Manitoba	11.8	9.1	3.3	22.6
Saskatchewan	x	x	x	x
Alberta	127.4	109.1	31.5	14.3
British Columbia	173.6	154.8	35.1	10.8
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	1,048.6	932.6	260.4	11.1

Note(s): According to the North American Industry Classification System (NAICS 54141). See "Data source, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 2
Summary statistics for industrial design services, by province and territory, 2008 to 2010

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
2010 p				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	x	x	x	x
New Brunswick	x	x	x	x
Quebec	54.0	45.4	18.9	16.1
Ontario	115.1	107.7	40.0	6.5
Manitoba	x	x	x	x
Saskatchewan	x	x	x	x
Alberta	60.5	51.0	16.8	15.7
British Columbia	22.0	19.1	6.6	13.2
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	261.3	231.4	85.1	11.4
2009 r				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	x	x	x	x
New Brunswick	x	x	x	x
Quebec	48.1	42.0	17.1	12.7
Ontario	103.2	93.8	33.1	9.1
Manitoba	x	x	x	x
Saskatchewan	x	x	x	x
Alberta	58.8	50.8	15.7	13.6
British Columbia	20.9	18.8	6.1	10.0
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	238.2	211.1	74.4	11.4
2008				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	x	x	x	x
New Brunswick	x	x	x	x
Quebec	44.5	37.3	13.6	16.1
Ontario	106.9	98.8	32.2	7.6
Manitoba	x	x	x	x
Saskatchewan	x	x	x	x
Alberta	50.0	38.1	14.7	23.7
British Columbia	28.1	26.3	9.8	6.7
Yukon Territory	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	236.6	206.1	72.7	12.9

Note(s): According to the North American Industry Classification System (NAICS 54142). See "Data source, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 3
Summary statistics for graphic design services, by province and territory, 2008 to 2010

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
2010 p				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	27.9	24.2	5.4	13.2
New Brunswick	12.0	9.9	3.4	17.8
Quebec	280.3	240.4	90.6	14.2
Ontario	674.5	582.1	232.0	13.7
Manitoba	22.7	19.4	7.9	14.4
Saskatchewan	8.0	6.4	3.3	19.4
Alberta	93.6	80.4	31.4	14.0
British Columbia	159.6	137.8	52.4	13.6
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	1,293.2	1,114.5	430.5	13.8
2009 r				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	24.7	20.4	5.2	17.4
New Brunswick	9.8	8.7	3.0	11.7
Quebec	267.4	227.6	89.3	14.9
Ontario	667.5	589.1	219.5	11.8
Manitoba	22.0	19.5	7.5	11.4
Saskatchewan	6.7	5.2	2.6	22.6
Alberta	88.0	77.0	25.4	12.5
British Columbia	157.4	136.0	51.7	13.6
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	1,258.2	1,096.5	408.1	12.9
2008				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	15.0	10.4	3.4	31.0
New Brunswick	10.8	9.0	2.7	16.9
Quebec	276.4	239.9	89.8	13.2
Ontario	735.5	630.5	224.2	14.3
Manitoba	25.1	21.1	8.2	16.2
Saskatchewan	6.5	5.0	2.2	23.7
Alberta	97.4	82.2	29.6	15.6
British Columbia	161.2	139.5	53.1	13.5
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	1,341.9	1,150.1	416.6	14.3

Note(s): According to the North American Industry Classification System (NAICS 54143). See "Data source, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 4
Summary statistics for other specialized design services, by province and territory, 2008 to 2010

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
2010 p				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	x	x	x	x
New Brunswick	x	x	x	x
Quebec	41.6	35.3	6.3	15.1
Ontario	69.3	59.5	15.3	14.1
Manitoba	x	x	x	x
Saskatchewan	x	x	x	x
Alberta	11.8	8.7	2.2	26.7
British Columbia	46.4	41.6	12.4	10.5
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	174.3	149.2	37.1	14.4
2009 r				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	x	x	x	x
New Brunswick	x	x	x	x
Quebec	40.7	34.6	5.4	15.0
Ontario	55.7	48.2	15.1	13.5
Manitoba	x	x	x	x
Saskatchewan	x	x	x	x
Alberta	10.0	8.0	2.8	20.1
British Columbia	42.4	38.2	11.2	9.7
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	153.8	132.9	35.4	13.6
2008				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	x	x	x	x
New Brunswick	x	x	x	x
Quebec	36.6	28.9	7.2	21.1
Ontario	94.2	86.4	32.8	8.3
Manitoba	x	x	x	x
Saskatchewan	x	x	x	x
Alberta	13.9	10.9	3.7	21.5
British Columbia	42.0	40.6	10.8	3.5
Yukon Territory	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
Canada	192.3	170.9	56.1	11.1

Note(s): According to the North American Industry Classification System (NAICS 54149). See "Data source, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 5
Operating expenses for interior design services, Canada, 2008 to 2010

	2008	2009 ^r	2010 ^p
	percent		
Total labour remuneration	29.6	31.1	31.4
Commissions paid to non-employees	F	F	F
Professional and business service fees	3.1	2.6	2.7
Subcontract expenses	11.7	10.4	8.8
Charges for services provided by your head office	x	x	x
Cost of goods sold	34.2	32.3	34.6
Office supplies	2.7	3.2	2.7
Rental and leasing	3.8	4.3	4.4
Repair and maintenance expenses	2.1	2.5	2.3
Insurance	F	1.0	F
Advertising, marketing and promotions	1.2	1.3	1.1
Travel, meals and entertainment	2.0	2.1	2.2
Utilities and telecommunications	1.3	1.4	1.6
Property and business taxes, licences and permits	F	F	F
Royalties, rights, licensing and franchise fees	x	x	x
Delivery, warehousing, postage and courier	F	F	F
Financial service fees	F	F	F
Amortization and depreciation of tangible and intangible assets	1.3	1.6	1.4
Bad debts	F	F	F
All other expenses	4.1	4.2	3.7

Note(s): According to the North American Industry Classification System (NAICS 54141). See "Data sources, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 6
Operating expenses for industrial design services, Canada, 2008 to 2010

	2008	2009 ^r	2010 ^p
	percent		
Total labour remuneration	38.8	36.4	38.1
Commissions paid to non-employees	F	F	F
Professional and business service fees	2.8	3.3	3.9
Subcontract expenses	9.8	5.8	7.5
Charges for services provided by your head office	x	x	F
Cost of goods sold	21.8	27.4	26.9
Office supplies	2.7	2.8	2.2
Rental and leasing	4.0	3.9	3.5
Repair and maintenance expenses	3.6	4.1	3.3
Insurance	1.1	F	F
Advertising, marketing and promotions	F	F	F
Travel, meals and entertainment	2.1	2.2	2.4
Utilities and telecommunications	1.7	1.5	2.0
Property and business taxes, licences and permits	F	x	x
Royalties, rights, licensing and franchise fees	x	x	x
Delivery, warehousing, postage and courier	F	x	F
Financial service fees	F	F	F
Amortization and depreciation of tangible and intangible assets	2.4	2.4	2.3
Bad debts	F	F	F
All other expenses	6.0	6.2	4.1

Note(s): According to the North American Industry Classification System (NAICS 54142). See "Data sources, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 7
Operating expenses for graphic design services, Canada, 2008 to 2010

	2008	2009 ^r	2010 ^p
	percent		
Total labour remuneration	37.8	38.9	40.5
Commissions paid to non-employees	F	F	F
Professional and business service fees	3.3	2.9	3.2
Subcontract expenses	7.4	7.8	7.5
Charges for services provided by your head office	x	x	x
Cost of goods sold	23.4	23.1	20.4
Office supplies	3.2	2.9	2.7
Rental and leasing	4.3	4.9	4.9
Repair and maintenance expenses	3.3	2.8	2.8
Insurance	F	F	F
Advertising, marketing and promotions	1.3	1.2	1.3
Travel, meals and entertainment	2.0	2.1	2.4
Utilities and telecommunications	1.9	2.0	2.3
Property and business taxes, licences and permits	F	F	F
Royalties, rights, licensing and franchise fees	x	x	x
Delivery, warehousing, postage and courier	F	F	F
Financial service fees	F	F	F
Amortization and depreciation of tangible and intangible assets	2.3	2.5	2.6
Bad debts	F	F	F
All other expenses	6.7	5.7	6.1

Note(s): According to the North American Industry Classification System (NAICS 54143). See "Data sources, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 8
Operating expenses for other specialized design services, Canada, 2008 to 2010

	2008	2009 ^r	2010 ^p
	percent		
Total labour remuneration	34.7	28.1	26.2
Commissions paid to non-employees	F	F	F
Professional and business service fees	3.0	6.9	4.1
Subcontract expenses	14.9	14.6	13.5
Charges for services provided by your head office	F	x	F
Cost of goods sold	22.4	23.2	27.0
Office supplies	1.9	2.2	2.5
Rental and leasing	3.8	4.7	5.4
Repair and maintenance expenses	2.2	2.2	2.5
Insurance	F	F	F
Advertising, marketing and promotions	1.3	1.6	1.9
Travel, meals and entertainment	3.4	2.6	3.6
Utilities and telecommunications	1.7	1.7	1.9
Property and business taxes, licences and permits	F	x	x
Royalties, rights, licensing and franchise fees	F	x	x
Delivery, warehousing, postage and courier	F	x	F
Interest expenses	F	F	F
Amortization and depreciation of tangible and intangible assets	1.6	2.1	2.0
Bad debts	1.9	2.0	F
All other expenses	4.5	5.3	5.7

Note(s): According to the North American Industry Classification System (NAICS 54149). See "Data sources, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

Table 9
Distribution of operating revenue by type of client, for specialized design services, Canada, 2008 to 2010

	Clients in Canada	Businesses (incl. architectural firms)	Individuals and households	Governments and public institutions	Clients outside Canada
	percent				
Interior design services					
2010 ^p	97.5	47.7	45.1	4.6	2.5
2009 ^r	96.9	48.3	43.7	4.9	3.1
2008	95.3	50.3	40.4	4.6	4.7
Industrial design services					
2010 ^p	85.7	76.5	4.7	4.5	14.3
2009 ^r	82.6	73.6	5.3	3.7	17.4
2008	81.4	72.6	4.5	4.3	18.6
Graphic design services					
2010 ^p	91.0	77.7	1.5	11.8	9.0
2009 ^r	91.7	75.3	1.9	14.4	8.3
2008	92.2	76.1	1.4	14.7	7.8
Other specialized design services					
2010 ^p	F	F	19.1	6.6	F
2009 ^r	F	F	13.3	7.5	F
2008	F	F	14.0	6.9	F

Note(s): According to the North American Industry Classification System (NAICS 54141, 54142, 54143 and 54149). Based on a sample of firms (weighted). The smallest firms, in terms of revenues earned, are not included in the estimates. These firms account for a relatively small portion of total industry revenues. Due to rounding, components may not add to total.

Table 10
Distribution of sales by type of service provided for specialized design services, Canada, 2008 to 2010

	2010 ^p	2009 ^r	2008
	percent		
Interior design services (54141)			
Residential interior design	48	48	45
Non-residential interior design	25	26	27
Interior decorating	14	12	12
All other	13	14	16
Total	100	100	100
Industrial design services (54142)			
Product industrial design	50	52	47
Model design and fabrication	31	25	19
All other	19	23	34
Total	100	100	100
Graphic design services (54143)			
Corporate identity and communication	26	24	22
Advertising graphic design	15	16	16
Commercial illustration	2	2	3
Graphic interface and interaction design	2	3	2
Book, magazine and newspaper graphic design	8	9	9
Broadcast and motion graphic design	2	2	3
Other graphic design	21	19	19
All other	24	25	26
Total	100	100	100
Other specialized design services (54149)			
Clothing, shoe, textile, jewellery, and other design	88	79	91
All other	12	21	9
Total	100	100	100

Note(s): According to the North American Industry Classification System (NAICS 54141, 54142, 54143 and 54149). Based on a sample of firms (weighted). The smallest firms, in terms of revenues earned, are not included in the estimates. These firms account for a relatively small portion of total industry revenues. Due to rounding, components may not add to total.

Table 11
Distribution of sales by type of service provided for specialized design services, Canada, 2008 to 2010

	2010 ^p	2009 ^r	2008
	percent		
Interior design services	32	33	32
Industrial design services	6	7	6
Graphic design services	37	38	37
Other specialized design services	6	4	6
Related services and products	19	18	19

Note(s): According to the North American Industry Classification System (NAICS 54141, 54142, 54143 and 54149). Based on a sample of firms (weighted). The smallest firms, in terms of revenues earned, are not included in the estimates. These firms account for a relatively small portion of total industry revenues. Due to rounding, components may not add to total.

Data sources, definitions and methodology

Description

This annual sample survey collects data required to produce economic statistics for the Specialized Design in Canada.

Data collected from businesses are aggregated with information from other sources to produce official estimates of national and provincial economic production for this industry.

Survey estimates are made available to businesses, governments, investors, associations, and the public. The data are used to monitor industry growth, measure performance, and make comparisons to other data sources to better understand this industry.

Target population

The target population consists of all establishments classified to Specialized Design Services industry (5414) according to the North American Industry Classification System (NAICS) during the reference year. This industry comprises establishments primarily engaged in interior design services (54141), industrial design services (54142), graphic design services (54143) and other specialized design services (54149).

Sampling

This is a sample survey with a cross-sectional design.

The frame is the list of establishments from which the portion eligible for sampling is determined and the sample is taken. The frame provides basic information about each firm including address, industry classification, and information from administrative data sources. The frame is maintained by Statistics Canada's Business Register Division and is updated using administrative data.

The basic objective of the survey is to produce estimates for the whole industry - incorporated and unincorporated businesses. The data come from two different sources: a sample of all businesses with revenue above or equal to a certain threshold (note: the threshold varies between surveys and sometimes between industries and provinces in the same survey) for which either survey or administrative data may be used; and administrative data only for businesses with revenue below the specified threshold. It should be noted that only financial information is available from businesses below the threshold; e.g., revenue, and expenses such as depreciation and salaries, wages and benefits. Detailed characteristics are collected only for surveyed establishments.

Prior to the selection of a random sample, establishments are classified into homogeneous groups (i.e., groups with the same NAICS codes and same geography). Quality requirements are targeted, and then each group is divided into sub-groups called strata: take-all, must-take, and take-some.

The take-all stratum represents the largest firms in terms of performance (based on revenue) in an industry. The must-take stratum is comprised of units selected based on complex structural characteristics (multi-establishment, multi-legal, multi-NAICS, or multi-province enterprises). All take-all and must-take firms are selected to the sample. Units in the take-some strata are subject to simple random sampling.

The effective sample size for reference year 2010 was 1,395 collection entities.

Definitions

- **Operating revenue** excludes investment income, capital gains, extraordinary gains and other non-recurring items.
- **Operating expenses** · exclude write-offs, capital losses, extraordinary losses, interest on borrowing, and other non-recurring items.
- **Operating profit margin** · is derived as follows: operating revenue minus operating expenses, expressed as a percentage of operating revenue. The derived figure excludes corporation income tax paid by incorporated businesses and individual income tax paid by unincorporated businesses. For unincorporated businesses, operating profit margin includes unpaid remuneration to partners and proprietors, which is not recorded as salaries, wages and benefits. Therefore the profit estimate will be higher in industries where unincorporated proprietorships and partnerships are significant contributors.
- **Salaries, wages and benefits** · include vacation pay and commissions for all employees for whom a T4 slip was completed. This category also includes the employer portion of employee benefits for items such as Canada/Quebec Pension Plan or Employment Insurance premiums. Salaries and wages do not include working owners' dividends nor do they include the remuneration of owners of unincorporated business. Therefore the relative level of salaries, wages and benefits will be lower in industries where unincorporated businesses are significant contributors.
- An active **statistical establishment** · is one production entity or the smallest grouping of production entities which produces as homogeneous a set of goods and/or services as possible; which does not cross provincial boundaries; and for which records provide data on the value of output together with the cost of principal intermediate inputs used and cost and quantity of labour resources used to produce the output.

Quality evaluation

Prior to dissemination, combined survey results are analyzed for overall quality; in general, this includes a detailed review of individual responses (especially for the largest companies), an assessment of the general economic conditions portrayed by the data, historic trends, and comparisons with other data sources.

Disclosure control

Statistics Canada is prohibited by law from releasing any data which would divulge information obtained under the Statistics Act that relates to any identifiable person, business or organization without the prior knowledge or the consent in writing of that person, business or organization. Various confidentiality rules are applied to all data that are released or published to prevent the publication or disclosure of any information deemed confidential. If necessary, data are suppressed to prevent direct or residual disclosure of identifiable data.

Data accuracy

Of the units contributing to the estimate, the weighted response rate was 83.6%. CVs were calculated for each estimate and are available upon request.

Related products

Selected CANSIM tables from Statistics Canada

360-0002	Specialized design services, summary statistics, by North American Industry Classification System (NAICS), annual (450 series)
360-0008	Specialized design services, sales by type of client based on the North American Industry Classification System (NAICS), annual (percent) (90 series)
360-0009	Specialized design services, operating expenses, by North American Industry Classification System (NAICS), annual (percent) (105 series)

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Symbols

The following standard symbols are used in Statistics Canada publications:

.	not available for any reference period
..	not available for a specific reference period
...	not applicable
0	true zero or a value rounded to zero
0 ^s	value rounded to 0 (zero) where there is a meaningful distinction between true zero and the value that was rounded
P	preliminary
r	revised
X	suppressed to meet the confidentiality requirements of the <i>Statistics Act</i>
E	use with caution
F	too unreliable to be published
*	significantly different from reference category ($p < 0.05$)

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