

Service bulletin

Newspaper Publishers

2006



Highlights

- The Canadian newspaper publishing industry experienced modest growth and stable profits in 2006, as rising revenues and profits in the western provinces compensated for slower results in the east.
- Operating revenues amounted to \$5.34 billion in 2006, up 2.6% from \$5.21 billion in 2005. The pace of revenue growth was slower than in each of the previous three years. However, the industry avoided the contraction that occurred in the United States, where newspaper publishing revenues declined 1.7%.
- Industry revenue growth in 2006 was a close reflection of regional economic performance as publishers in the western provinces, and Alberta in particular, had the highest growth rates. Operating revenues for publishers in Western Canada grew by 3.9%, nearly double the rate of 2.1% in Ontario and 2.0% in Quebec.
- The industry's operating profit margin held steady at 13.2%. Profit margins were also healthiest in Western Canada, rising from 18.2% in 2005 to 21.1% in 2006. In contrast, profit margins in Ontario declined from 10.0% to 7.4% under the weight of a 5.1% increase in operating expenses.
- Operating expenses rose 2.6% in 2006, matching the rise in operating revenues. Salaries, wages, and benefits, which account for 39% of industry expenses, rose 3.6% while printing costs, the second largest expense item, held steady.
- Advertising revenues rose 2.7% to \$3.98 billion in 2006. Daily newspapers accounted for \$2.85 billion of the industry's advertising revenues, compared to \$1.13 billion for community newspapers.
- Competition from free news sources on the internet and from the increasing number of free daily newspapers continued to provide downward pressure on print circulation figures among the paid daily newspapers. Despite this, industry circulation revenues rose 1.5% to \$862 million in 2006, due in large part to price increases and changes in accounting practices.

Industry facts and figures

About the survey

The following data release is for Statistics Canada's annual survey of Newspaper Publishers, which surveys companies under the North American Industry Classification System (NAICS) industry 511110. This NAICS industry consists of establishments engaged in carrying out operations necessary for producing and distributing newspapers, including gathering news, writing news columns, feature stories and editorials, and selling and preparing advertisements. Newspapers included in this definition are daily newspapers, community newspapers, or other newspapers that provide general news and information of current public interest. The industry also includes ethnic newspapers and university student newspapers, but it does not include shoppers or newspapers devoted to a single theme (e.g., business, entertainment). Printing establishments that do not publish any newspapers are also excluded. The boundaries of the NAICS industry should be considered when making comparisons between these and other industry estimates.

This survey was not conducted in 2002, however estimates have been produced for the year based on administrative data and industry sources. Estimates for the previous survey year (2005) were revised to reflect updated information.

In the reporting year of 2006, 135 questionnaires were mailed out to business entities representing 644 establishments. The survey portion of the overall industry estimate represented 54% of all newspaper publishing establishments and 97.5% of estimated revenues for the industry. The survey portion accounts for all daily newspaper operations and all but \$132 million of operating revenues for community newspaper establishments.

Industry revenues

Total operating revenue for newspaper publishers was \$5.34 billion in 2006, up 2.6% from 2005. The pace of growth was slower than in each of the previous three years when rates of growth were 4.5% (2003), 3.5% (2004) and 3.4% (2005). However, the Canadian newspaper publishing industry avoided the contraction that took place in the United States in 2006 where newspaper publishing revenues declined 1.7%.

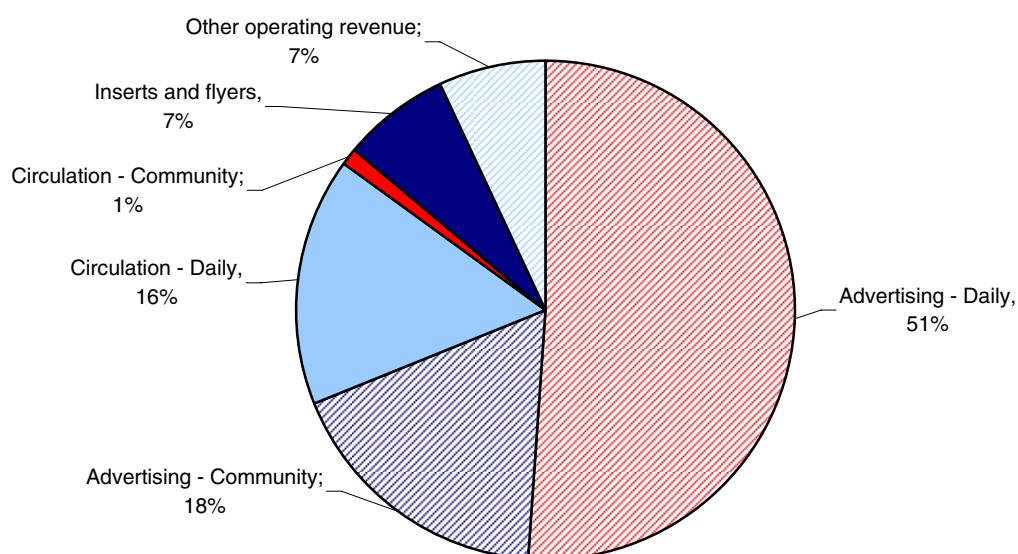
Newspaper publishing revenue has increased 14.4% since 2000, a figure that is almost identical to inflation in the overall economy over the same period as measured by the Consumer Price Index.¹

The newspaper publishing industry generates revenue primarily from advertising and from paid circulation for its newspapers. Circulation and advertising are closely linked, as a newspaper's readership levels are important in determining its ability to earn advertising revenue.

Advertising revenues

Advertising is the largest source of revenue for Canadian newspaper publishers, accounting for roughly 76% of industry operating revenues. This includes sales of advertising space in the newspaper as well as revenues from inserts and flyers (see Chart 1).

Chart 1
Operating revenue by source, 2006



Note(s): Surveyed portion only.

1. Statistics Canada, CANSIM Table 326-0021, Consumer Price Index (CPI), 2005 basket, annual.

Of the \$3.98 billion in advertising revenues² generated by the industry in 2006, daily newspapers earned \$2.85 billion, an increase of 1.9% from 2005. Community and weekly newspaper publishers earned \$1.13 billion in advertising revenues. Since 2000, advertising revenues have increased by 29% for community newspapers in comparison to the 9% increase for daily newspapers.

Table 1

Advertising revenue by type of paper (including revenue from flyers and inserts)

	2000	2001	2002	2003	2004	2005	2006
	millions of dollars						
Daily	2,619	2,540	2,613	2,629	2,732	2,800	2,855
Community	872	876	900	1,006	1,071	1,074	1,126
Total	3,492	3,416	3,513	3,635	3,803	3,874	3,980

Note(s): Surveyed portion only. Due to rounding, components may not add to total.

Daily newspapers earned 32% of their advertising revenues from national advertising in 2006, while national advertising accounted for only 9% of ad revenues for community papers. On the other hand, local advertising accounted for 74% of ad revenue for community papers last year, and only 40% for daily newspapers. Classifieds are the third source for advertising, and they accounted for 28% of advertising revenues for daily papers and 16% for community newspapers.

National advertising revenues are earned from national or regional campaigns. Local advertising revenues are from department stores, restaurants, specialty stores and supermarkets found in the community, as defined by the Canadian Newspaper Association.

Circulation revenues

Circulation revenue is the second-largest source of revenue for newspaper publishers, representing 17% of industry revenues. In recent years, competition from free news sources on the internet and from the growing number of free daily newspapers have contributed to a downward trend for print circulation figures among the paid daily newspapers. According to the Canadian Newspaper Association, average circulation among Canada's paid daily newspapers decreased 1.0% in 2006, following decreases in each of the previous four years.³

Circulation revenue was \$862 million in 2006 compared to \$850 million in 2005, an increase of 1.5%. The increase in 2006 is due in large part to changing accounting practices, as additional publishing firms switched to reporting gross circulation revenues instead of circulation revenues net of distribution expenses. This trend has contributed to increases in circulation revenues, operating revenues and operating expenses in each of the last three years. Price increases also contributed to the rise as newspaper prices rose 2.5%, as measured by the Consumer Price index.⁴

2. Please note that in data reports prior to 2005, advertising revenue consisted solely of the advertising revenue earned from advertisements in the newspaper itself. However, starting in 2005 advertising revenues include distribution revenue earned from inserts in the paper such as flyers. This new definition of advertising revenues is more in line with what the industry considers as advertising revenues. It has been applied in the above table to figures produced before 2005.

3. Canadian Daily Newspaper Circulation Data: 2006, p.2.

4. Statistics Canada, CANSIM Table 326-0021, Consumer Price Index (CPI), 2005 basket, annual.

Table 2
Circulation revenue by type of paper

	2000	2001	2002	2003	2004	2005	2006
	millions of dollars						
Daily	723	709	712	743	790	813	824
Community ¹	44	39	37	36	39	37	39
Total	767	748	749	779	829	850	862

1. Use trends in the circulation revenues for community newspapers with caution due to the small size of the figures and the higher than normal coefficients of variation associated with them.

Note(s): Surveyed portion only. Due to rounding, components may not add to total.

The daily newspaper and community newspaper segments of the industry differ in the proportions of revenue earned from these two principal revenue streams. While both earn the majority of their revenue from advertising, the community newspaper industry is more heavily reliant on advertising as many of its newspapers are distributed free of charge. In 2006, community newspapers earned \$29 in advertising revenue for every dollar of circulation revenue. By comparison, the proportion for daily newspapers was \$3.50 in advertising revenues for each dollar of circulation revenue earned.

Advertising and circulation revenues can be earned from both print and online formats of newspapers.

Operating expenses

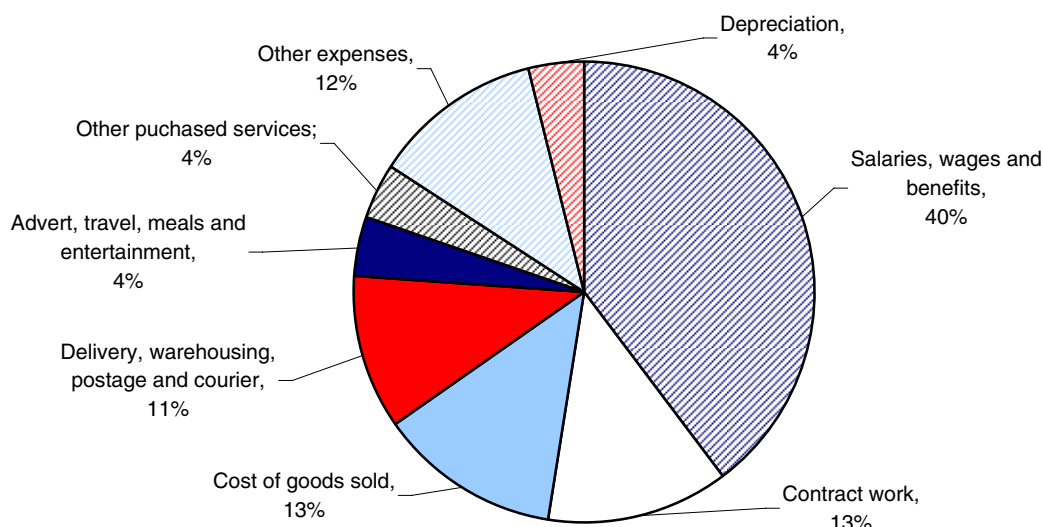
Operating expenses for the newspaper publishing industry rose to \$4.63 billion in 2006 from \$4.52 billion in 2005, a 2.6% increase that was equal to growth in operating revenues. Consequently, the operating profit margin for the industry held steady at 13.2%.

Roughly 39% of industry operating expenses were paid to employees in salaries, wages, and benefits, for a total of \$1.83 billion in 2006 (40% in surveyed portion - see Chart 2). This was an increase of 3.6% from 2005.

Newspaper publishers may operate their own printing presses or outsource this work to another newspaper publisher or printing establishment. Printing costs, the sum of newsprint and contract printing expenses, held steady in 2006 despite a 1.8% increase in domestic newsprint prices.⁵

5. Statistics Canada, CANSIM Table 329-0042, Industry Price Indexes for lumber, sawmill, other wood products, furniture and fixtures, paper and paper products, printing and publishing, computed annual average.

Chart 2
Operating expenses by source, 2006



Note(s): Surveyed portion only.

Newspaper data by region

Industry performance in 2006 was a close reflection of regional economic performance, as publishers in the western provinces, and Alberta in particular, posted the highest revenue growth rates and profit margins.

Operating revenues for publishers in Western Canada (including territories) grew by 3.9%, nearly double the rate of 2.1% in Ontario and 2.0% in Quebec. Advertising revenues tend to be sensitive to prevailing economic conditions, and Alberta's booming economy and growing population contributed to a 5.3% increase in industry operating revenues in 2006, driven by a 5.8% increase in advertising revenues. Operating revenue results in the Atlantic provinces were lower due in part to restructuring of printing operations that, for statistical purposes, were formerly included in publishing industry estimates.

Profit margins continued to be healthiest in Western Canada, rising from 18.2% in 2005 to 21.1% in 2006. Alberta again lead the way with an operating profit margin that leapt from 26.4% to 31.1% as publishers held operating expenses down, despite a 5.0% increase in salaries, wages and benefits. In contrast, profit margins in Ontario declined from 10.0% to 7.4% under the weight of a 5.1% increase in operating expenses. Publishers in Quebec and the Atlantic provinces posted profit margins of 13.5% and 12.3% respectively.

Table 3
Summary of major variables by region

	2000	2001	2003	2004 ¹	2005 ¹	2006 ¹
	millions of dollars					
Atlantic provinces ²						
Operating revenue	260	259	281	266	260	259
Operating expenses	222	223	239	230	234	227
Salaries, wages and benefits	101	98	104	103	99	97
Operating profit margin (in percentage)	14.6	13.9	15.0	13.7	10.1	12.3
Advertising revenue	170	170	192	204	195	195
Circulation revenue	50	49	48	50	48	49
Quebec						
Operating revenue	876	886	907	979	1,010	1,030
Operating expenses	723	747	752	834	873	891
Salaries, wages and benefits	342	338	340	365	376	379
Operating profit margin (in percentage)	17.5	15.7	17.1	14.8	13.6	13.5
Advertising revenue	643	672	694	771	779	792
Circulation revenue	173	175	162	161	162	176
Ontario						
Operating revenue	2,151	2,058	2,175	2,236	2,284	2,332
Operating expenses	1,902	1,949	1,920	1,957	2,056	2,160
Salaries, wages and benefits	715	693	717	738	722	752
Operating profit margin (in percentage)	11.6	5.3	11.8	12.5	10.0	7.4
Advertising revenue	1,619	1,540	1,637	1,657	1,657	1,686
Circulation revenue	355	336	344	385	404	396
Western provinces (and the territories)						
Operating revenue	1,381	1,353	1,502	1,553	1,654	1,719
Operating expenses	1,130	1,113	1,222	1,296	1,353	1,355
Salaries, wages and benefits	500	492	527	545	566	598
Operating profit margin (in percentage)	18.2	17.7	18.6	16.5	18.2	21.1
Advertising revenue	1,058	1,040	1,111	1,170	1,243	1,308
Circulation revenue	188	189	224	233	236	241
Canada						
Operating revenue	4,669	4,556	4,864	5,034	5,207	5,341
Operating expenses	3,977	4,032	4,132	4,317	4,515	4,634
Salaries, wages and benefits	1,659	1,621	1,688	1,751	1,763	1,826
Operating profit margin (in percentage)	14.8	11.5	15.1	14.2	13.3	13.2
Advertising revenue	3,492	3,416	3,635	3,803	3,874	3,980
Circulation revenue	767	748	779	829	850	862

1. A number of newspaper publishers switched from reporting circulation revenues net of distribution expenses, to reporting full circulation revenues and higher distribution expenses.

2. In 2004 and 2006, printing operations that had previously been included in the figures were not reported due to company restructuring, causing downward shifts in revenues and expenses (Atlantic Region).

Note(s): The data are grouped by regions of Canada to maintain the confidentiality of the respondents. Advertising and circulation revenues are for the surveyed portion only.

Table 4
Summary statistics for newspaper publishers, Canada

	Operating Revenue ¹	Salaries, wages and benefits	Operating expenses	Profit margin
	millions of dollars			percent
Newspaper publishers, all firms				
1999 ²	4,632.9	1,615.8	4,027.7	13.1
2000	4,668.6	1,658.5	3,977.2	14.8
2001	4,556.5	1,620.9	4,032.2	11.5
2002 ³	4,656.1	1,658.6	4,041.5	13.2
2003	4,864.6	1,687.8	4,132.3	15.1
2004	5,033.9	1,751.2	4,317.3	14.2
2005 ⁴	5,207.4	1,762.7	4,515.2	13.3
2006 ^p	5,340.7	1,825.9	4,633.7	13.2

1. One-time changes in accounting for circulation revenues have contributed to upward shifts in operating revenues and expenses in 2004, 2005 and 2006.

2. In 1999, total revenue and total expenses were used.

3. The survey was not conducted in 2002. Estimates were calculated using a combination of administrative data and industry trends.

4. There was a change in the questionnaire in 2005 however the definitions for these key variables remain the same as previous survey years.

Note(s): According to the North American Industry Classification System (NAICS 51111).

Table 5
Revenue by activity as a percentage of operating revenue, Canada

	2004	2005 ^r	2006
	percentage		
Advertising revenue	72.3	70.1	69.7
Daily newspapers	53.4	52.1	51.3
Community newspapers ¹	18.2	17.1	17.9
Other newspapers	0.7	0.9	0.6
Circulation revenue	16.9	16.7	16.6
Daily newspapers	16.1	16.0	15.8
Community newspapers ¹	0.7	0.6	0.6
Circulation sales – other	0.0	0.1	0.1
Custom printing	3.3	3.3	3.6
Distribution of flyers and inserts ²	5.2	6.2	6.7
Other operating revenue ³	2.2	3.6	3.5
Total operating revenues	100	100	100

1. University, ethnic and religious newspapers are also included in this category.

2. This value does not represent the full amount of revenues from flyer distribution as this activity was frequently reported as a form of advertising revenue.

3. Includes, for example: sales of mailing lists, photocopies, stationery, supplies, grants and subsidies, donations, insurance settlements, bad debt recovery, etc.

Note(s): Surveyed portion only. Due to rounding, components may not add to total.

Table 6
Selected expenditures as percentage of operating expenses, Canada

	2004	2005 ^f	2006
	percentage		
Salaries, wages and employee benefits	40.8	39.2	39.6
Contract work (includes contract printing and freelancers)	13.1	14.2	13.5
Cost of goods sold (includes newsprint, ink, etc.)	13.0	12.5	13.1
Delivery, warehousing, postage and courier	10.5	10.4	10.5
Advertising, travel, meals, and entertainment	3.9	4.0	4.2
Rental and leasing	1.1	1.2	1.1
Repair and maintenance	1.0	0.9	0.9
Other purchased service expenses ¹	4.1	3.3	3.7
Other operating expenses ²	9.0	11.0	9.6
Depreciation and amortization	3.5	3.3	3.7
Total operating expenses	100	100	100

1. Includes: telephone and other telecommunication expenses; legal, accounting, auditing, consulting and other professional service fees; commissions paid to non-employees; financial service fees; insurance; royalties, rights and licensing and franchise fees; property and business taxes, licences and permits.

2. Includes, for example: energy expenses; fees paid to head office; office supplies; bad debts; donations.

Note(s): Surveyed portion only. Due to rounding, components may not add to total.

Concepts, methodology and data quality

The following information is to ensure a clear understanding of the basic concepts that are being measured, the underlying survey methodology (how the concepts are measured), and key aspects of data quality. This information will provide you with a better understanding of the strengths and limitations of the data, and of how they can be effectively used and analysed. The information may be of particular importance when making comparisons with data from other surveys or sources of information, and in drawing conclusions regarding changes over time.

Definitions

- A **business entity** is an economic transactor having the responsibility and the authority to allocate resources in the production of goods and services.
- A **statistical establishment** is one production entity or the smallest grouping of production entities which produces as homogenous 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. In the newspaper publishing industry, a statistical establishment may produce more than one title, and may produce goods and services not related to its newspaper publishing activities (e.g., books, directories, stationery).
- A **statistical enterprise** is an organisational unit of a business that directs and controls the allocation of resources relating to its domestic operations, and for which consolidated financial and balance sheet accounts are maintained from which international transactions, an international investment position and a consolidated financial position for the unit can be derived.
- A **complex enterprise** is an enterprise that operates in more than one province and/or operates in more than one industry and/or is multi-legal (links to more than one legal entity).
- A **simple enterprise** is an enterprise that operates in one province, one industry and is a single legal entity.

- In complex businesses, there may be an organisational unit above the establishment but below the enterprise. The **statistical company** is defined as the organisational unit for which income and expenditure accounts and balance sheets are maintained from which operating profit and the rate of return on capital can be derived.
- **Salaries, wages and benefits** include vacation pay and commissions for all employees for whom a T4 supplementary form was completed. This category also includes the employer portion of employee benefits for items such as Canada/Québec 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.
- **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, profit margin includes unpaid remuneration accruing to partners and proprietors, which is not recorded as salaries, wages and benefits.

Survey design

The target population consists of all statistical establishments (sometimes referred to as firms or units) classified as Newspaper Publishers according to the North American Industry Classification System (NAICS) during the reference year 2006. This industry comprises establishments, known as newspaper publishers, primarily engaged in carrying out operations necessary for producing and distributing newspapers, including gathering news, writing news columns, feature stories and editorials, and selling and preparing advertisements. These establishments may publish newspapers in print or electronic form. Data users who wish to learn more about NAICS, its underlying principles, and many of the other statistical concepts discussed in this brief summary, are referred to www.statcan.ca under "Definitions, Data sources and Methods", Standard Classifications, Industry for NAICS 2002.

Even though the basic objective of the survey is to produce estimates for the whole industry—all incorporated and unincorporated businesses—not all businesses are surveyed. Rather, a sample is surveyed and the portion eligible for sampling is defined as all statistical establishments with revenue above a certain threshold. This low revenue threshold varied between provinces. The excluded portion represents a substantial proportion of the industry in terms of number of establishments (46%), but its contribution to the overall industry revenue is only about 2.5%. These excluded establishments are accounted for in the final estimates through the use of administrative data. However, only basic information is obtained from administrative sources, i.e., total revenue, expenses, depreciation and salaries, wages and benefits. Detailed characteristics such as revenue by type of service, and detailed expense items are collected only for surveyed establishments.

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 (as discussed above). The frame is maintained by Statistics Canada's Business Register, and is updated using administrative data.

Prior to the selection of a random sample, establishments are classified into homogeneous groups (i.e., groups with the same NAICS codes, same geography (province/territory), and same business type (incorporated/unincorporated) attributes). 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 includes the largest firms in terms of performance (based on revenue) in an industry. Every firm is sampled, which means each firm represents itself and is given a weight of one. The must-take stratum is also comprised of self-representing units, but these are selected on the basis of complex structure characteristics (multi-establishment, multi-legal, multi-NAICS, or multi-province enterprises). Units in the take-some strata are subjected to simple random sampling.

Finally, the sample size is increased, mostly to compensate for firms that no longer belong in the industry, i.e., they have gone out of business, changed their primary business activity, are inactive, or are duplicates on the frame. After removing such firms, the sample size for this survey was 135 collection entities.

Collection

Data are collected through a mail-out/mail-back process, while providing respondents with the option of telephone or other electronic filing methods. The statistical establishment is used as the sampling unit, but selected establishments belonging to the same company, the same industry, and the same province are aggregated to create a collection entity. This reduces respondent burden and simplifies collection. Therefore, companies with production in more than one province are mailed one questionnaire per province and instructed to report for all Canadian operations.

Edit and imputation

Several checks are performed on the collected data to verify internal consistency and identify extreme values. Where information is missing, imputation is performed using either a "nearest neighbour" procedure (donor imputation), using historical data where available or finally, using administrative data as a proxy for reported data.

Estimation

As part of the production of final numbers (referred to as estimation), data for companies operating in more than one province or territory are allocated to the provincial level. Administrative data are used to estimate for the portion of the industry that was excluded from survey activity (i.e., small firms whose revenues fell below cut-off thresholds). Sampled data are then weighted to produce estimates representative of the target population.

Prior to publication, combined survey results are analysed for comparability; in general, this includes a detailed review of: individual responses (especially for the largest companies), general economic conditions, historic trends, and comparisons with administrative data (e.g., income tax, goods and services tax, payroll deductions records, industry and trade association sources).

Data quality

While considerable effort is made to ensure high standards throughout all stages of collection and processing, the resulting estimates are inevitably subject to a certain degree of error. These errors can be broken down into two major types: non-sampling and sampling.

Non-sampling error is not related to sampling and may occur for many reasons. For example, non-response is an important source of non-sampling error. Population coverage, differences in the interpretation of questions, incorrect information from respondents, and mistakes in recording, coding and processing data are other examples of non-sampling errors.

The **response rate** for this survey was 98.7% in reference year 2006, after taking into account the factors discussed in this statement.

Sampling error occurs because population estimates are derived from a sample of the population rather than the entire population. Sampling error depends on factors such as sample size, sampling design, and the method of estimation. An important property of probability sampling is that sampling error can be computed from the sample itself by using a statistical measure called the coefficient of variation (CV). The assumption is that over repeated surveys, the relative difference between a sample estimate and the estimate that would have been obtained from an enumeration of all units in the universe would be less than twice the CV, 95 times out of 100. The range of acceptable data values yielded by a sample is called a confidence interval. Confidence intervals can be constructed around the estimate using the CV. First, we calculate the standard error by multiplying the sample estimate by the CV. The sample estimate plus or minus twice the standard error is then referred to as a 95% confidence interval.

For the Newspaper Publishers Survey, CVs were calculated for each estimate. Generally, the more commonly reported variables obtained excellent CVs (5% or less), while the less commonly reported variables were associated with higher but still very good CVs (under 10%). The CVs are available upon request.

Related products

CANSIM

Available on CANSIM: table 361-0003 - Summary statistics for newspaper publishers (all establishments), by North American Industry Classification System (NAICS), annual (5 series)

Survey(s)

Definitions, data sources and methods: survey number 4710 - Annual Survey of Service Industries: Newspaper Publishers

Publications

Service Industries Newsletter, Catalogue no. 63-018-X.

Analytical paper series - Service Industries Division, Catalogue no. 63F0002X.

Release date: June 2008

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

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