

## Service bulletin

# Consulting Services

2006



### Highlights

- Operating revenue for the consulting services industry increased to \$10.9 billion in 2006, a 14.8% increase from the previous year. This outcome was a result of strong growth in the two industries covered, these being management consulting services and environmental and other scientific and technical consulting services. Strong growth was posted in nearly all provinces, with particularly large gains in western Canada.
- The largest operating revenue increases were in the environmental and other scientific and technical consulting services industry (+28.7 %) followed by the management consulting services industry (+10.1%). The continuing interest in environmental issues and the boom in the natural resource sector in the western provinces certainly contributed to the large increases in the environmental and other scientific and technical consulting services industry.
- Operating expenses for consulting services firms rose to \$8.8 billion in 2006, a 15.9% increase over the prior year. Businesses in the industry rely heavily on the knowledge of employees to provide services and as a result, salaries, wages and benefits paid to employees are the single largest expense, accounting for 42 cents out of every dollar spent in 2006.
- The operating profit margin for the entire industry was 19.6%, which is lower than the 2005 rate of 20.4%
- Close to half of the industry's operating revenue are generated in Ontario (45%), followed by Alberta (19%), Quebec (16%), and British Columbia (14%).
- The four western provinces showed strong growth in operating revenue: Saskatchewan (+29.2%), British Columbia (+25.2%), Manitoba (+20.1%) and Alberta (+16.1%). Firms located in Quebec and Ontario grew by 15.8% and 10.3% respectively.
- The consulting services industry consists of firms that provide expert advice and assistance to other organizations on a variety of topics including management, human resources, environmental issues, international development, and scientific and technical issues. The common trait of businesses classified to the consulting industry is that they help other organizations grow and develop by providing expert advice.

## 2006 Survey Detailed Results

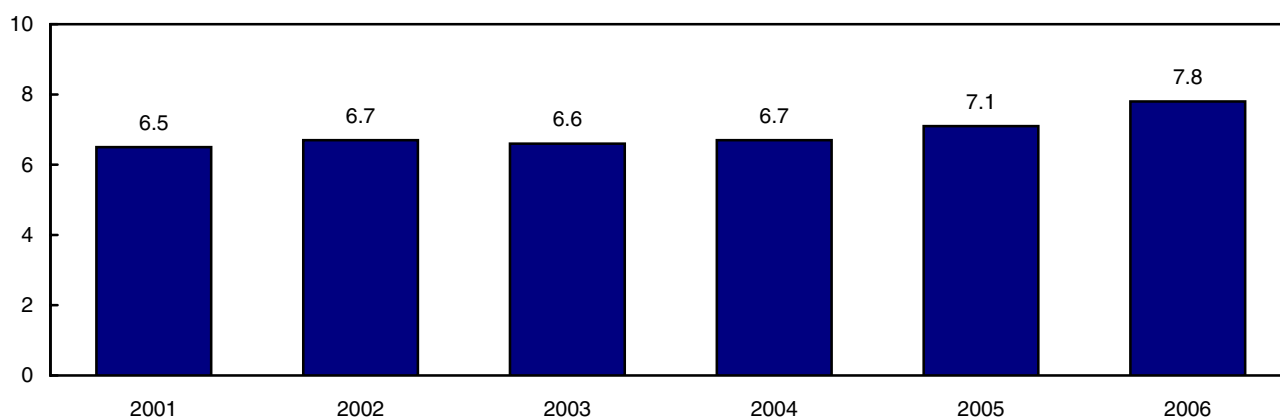
### Operating Revenue

The consulting services industry consists of management consulting services (NAICS 54161) and environmental and other scientific and technical consulting services (NAICS 54162 & 54169).

In 2006, operating revenue climbed to \$7.8 billion for the management consulting services industry and to \$3.1 billion for the environmental and other scientific and technical consulting services industry, for a total of \$10.9 billion for the overall industry.

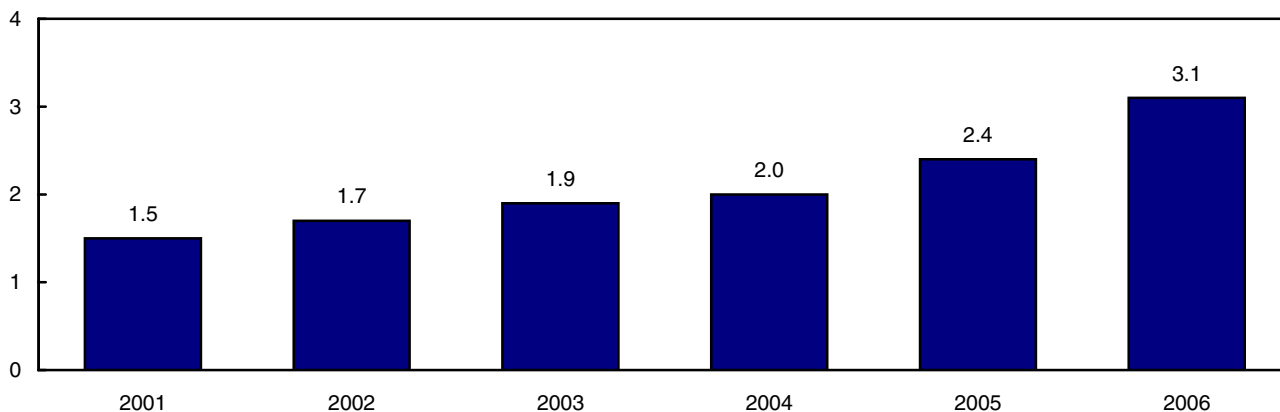
**Chart 1**  
**Operating revenue for management and consulting services**

billions of dollars



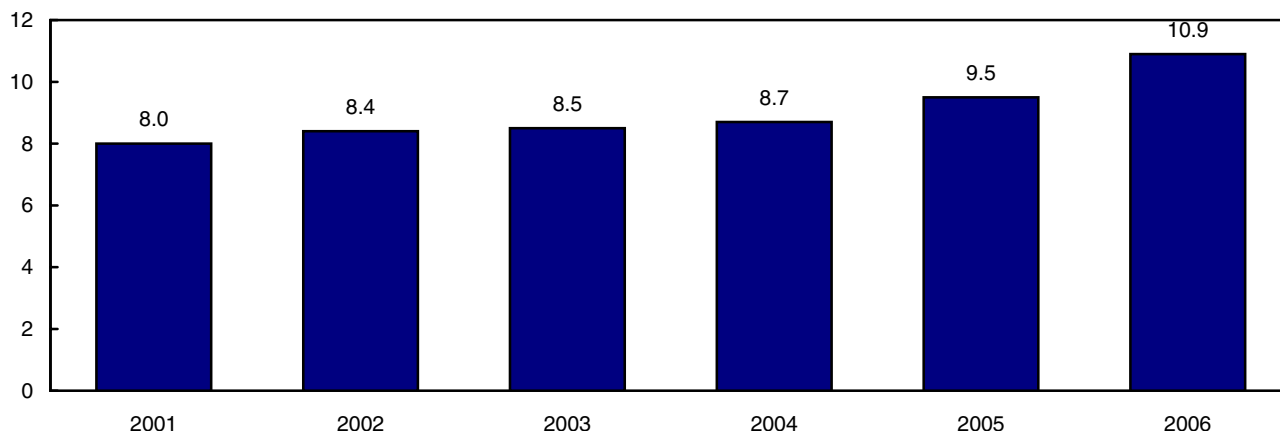
**Chart 2**  
**Operating revenues for environmental and other scientific and technical consulting services**

billions of dollars



**Chart 3**  
**Operating revenue for consulting services**

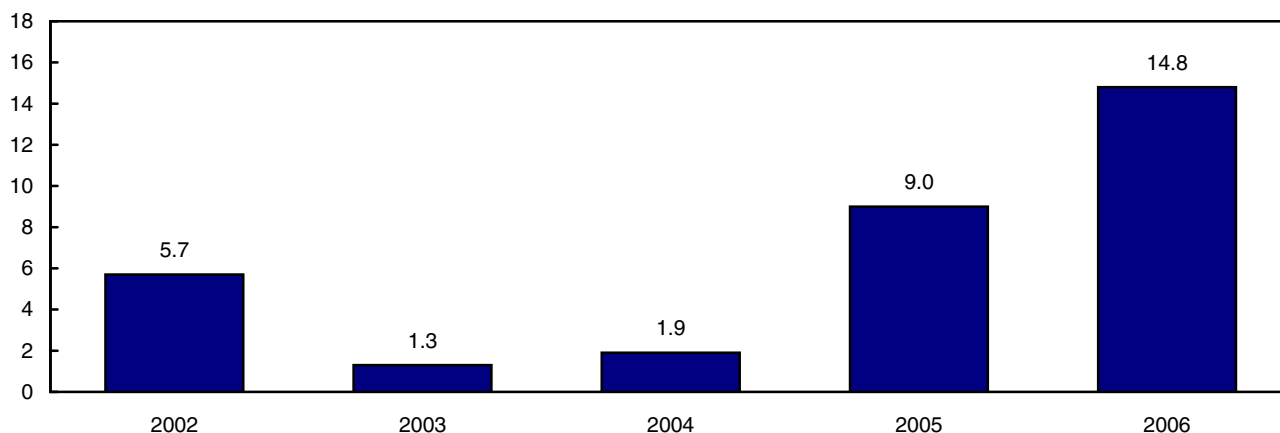
billions of dollars



Operating revenue for the consulting services industry rose by 14.8% in 2006. This strong growth is significant because it follows a substantial increase of 9.0% in 2005. The consulting services industry has seen its operating revenue grow since 2002, with its rate of growth accelerating as of 2004.

**Chart 4**  
**Growth of operating revenue for consulting services**

percent

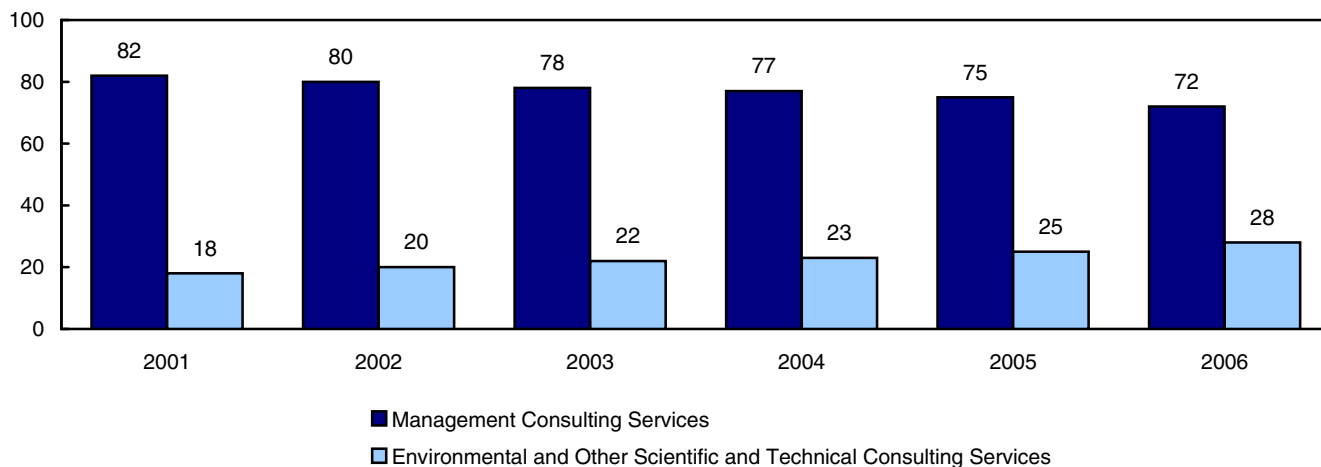


The strong growth witnessed in this industry in 2006 is mainly due to the contribution of the environmental and other scientific and technical consulting services industry, which grew by 28.7% in 2006.

Since 2001, the share of the environmental and other scientific and technical consulting services industry has been increasing at the expense of the management consulting services industry.

**Chart 5**  
**Distribution of operating revenue by industry**

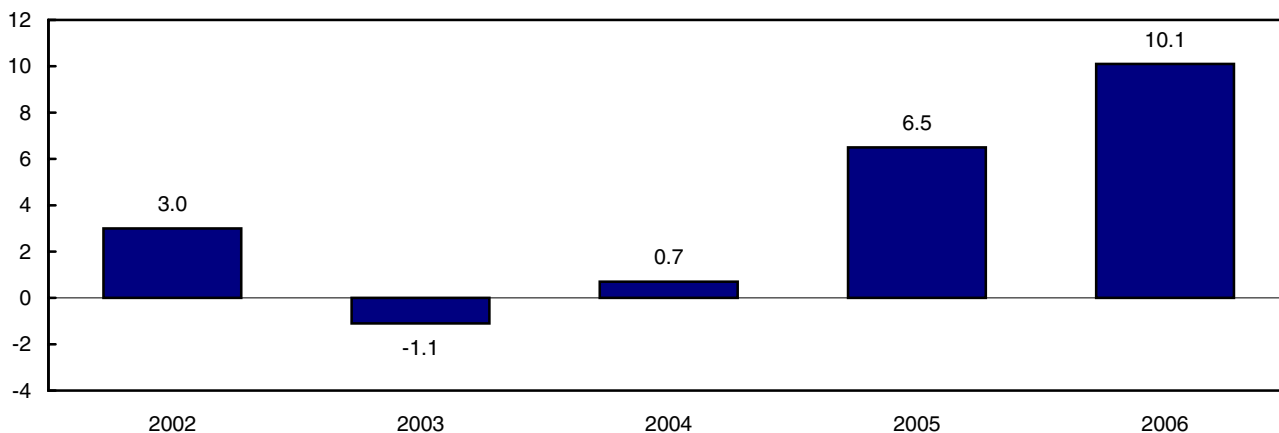
percent



The change in the distribution of operating revenue since 2002 shows that operating revenue have increased at a much slower rate for the management consulting services industry than for the environmental and other scientific and technical consulting services industry.

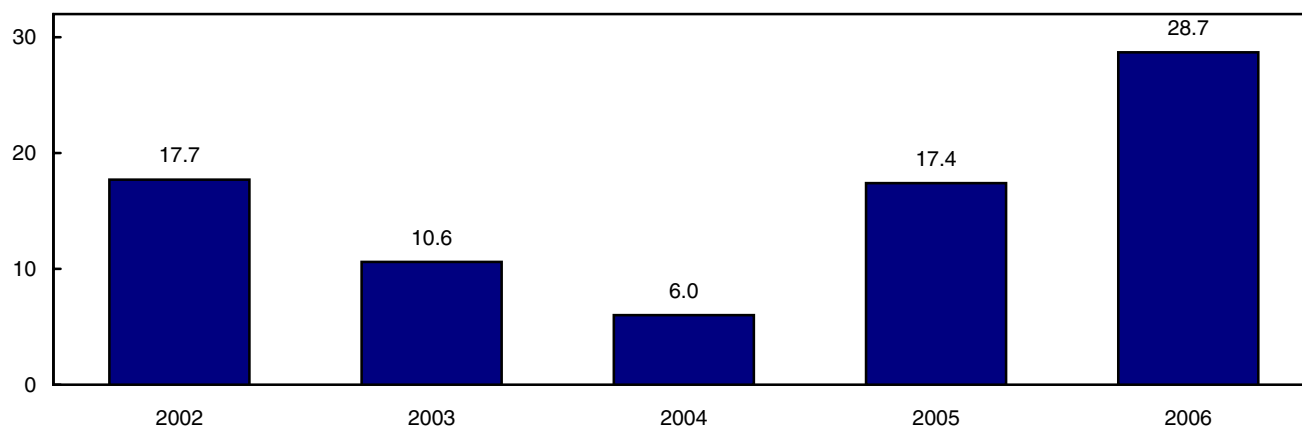
**Chart 6**  
**Growth of operating revenue for management consulting services**

percent



**Chart 7**  
**Growth of operating revenue for environmental and other scientific and technical consulting services**

percent

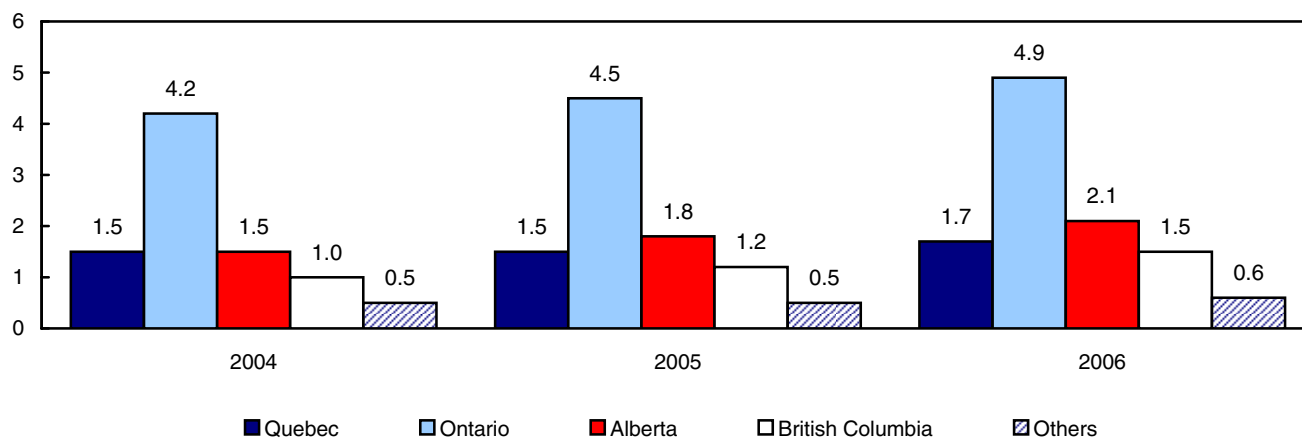


### Operating Revenue by Province

Ontario continues to dominate industry operating revenue in 2006 (\$4.9 billion) with a 45% share (down from 47% in 2005) of the national consulting services industry. With operating revenue of \$2.1 billion, Alberta follows with 19%.

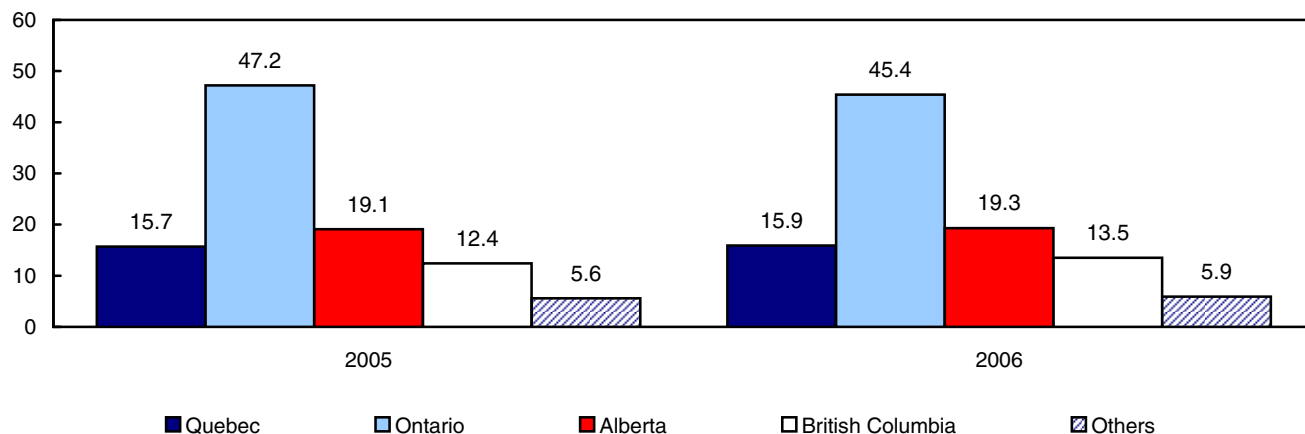
**Chart 8**  
**Operating revenue by province for consulting services**

billions of dollars



**Chart 9**  
**Distribution of operating revenue by province for consulting services**

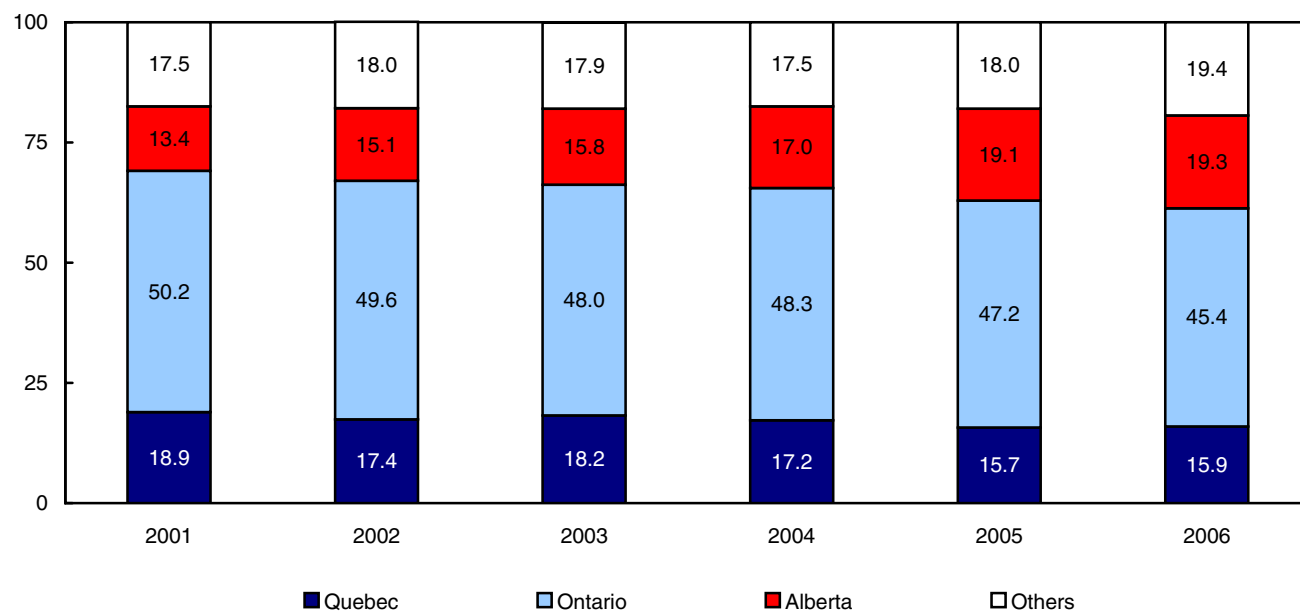
percent



Alberta's share of operating revenue has been slowly but steadily increasing from 2001 to 2006 (from 13.4% to 19.3%), at the expense of Quebec (from 18.9% to 15.9%) and Ontario (from 50.2% to 45.4%).

**Chart 10**  
**Distribution of operating revenue by province for consulting services**

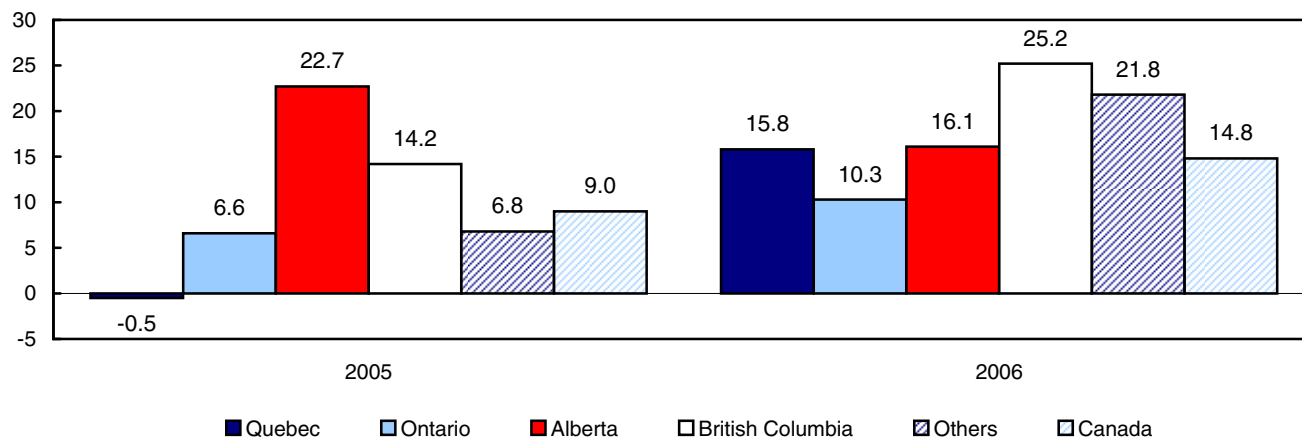
percent



For the overall industry, most provinces posted strong gains in 2006. Among the largest provinces, growth was substantial in Ontario (10.3%), Quebec (15.8%), Alberta (16.1%), and was particularly strong in British Columbia (25.2%).

**Chart 11**  
Growth of operating revenue for consulting services

percent

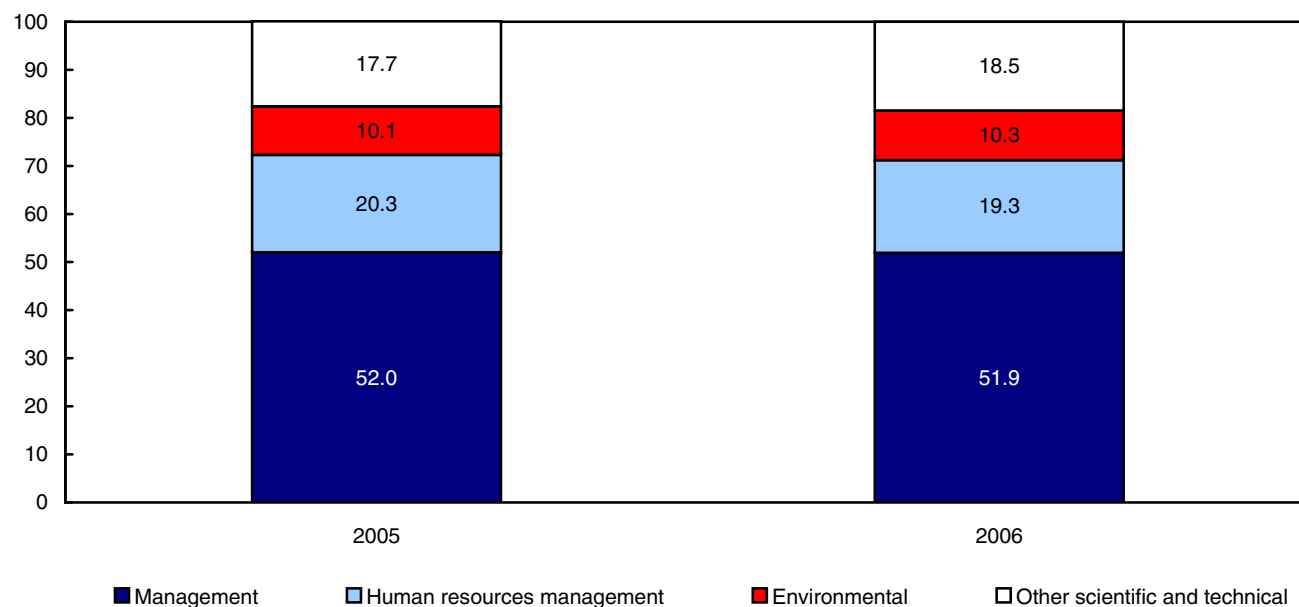


### Sales by Type of Product or Service

Based on the “survey” portion data (which excludes estimates derived from administration sources), 51.9% of sales were for management consulting services, which is virtually unchanged from 2005. The human resources management consulting services has seen its share of sales decrease slightly from 2005 (20.3%) to 2006 (19.3%). Other scientific and technical consulting services have seen its share of sales increase from 17.7% to 18.5% over the same period.

**Chart 12**  
Distribution of sales by type of consulting service

percent



## Operating Expenditures

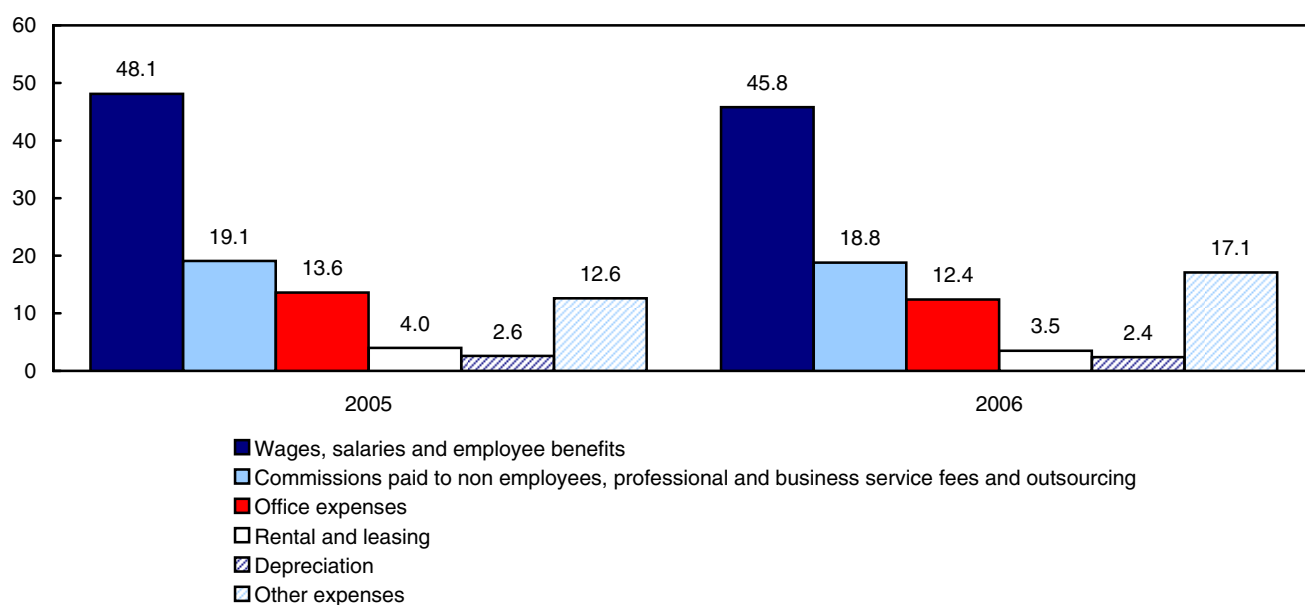
Operating expenses grew by 15.9% for the overall industry in 2006 to reach \$8.8 billion. Salaries, wages and benefits of employees made up 42% of total operating expenditures over this period. This is due to the heavy reliance of consulting firms on knowledge based resources to provide services to clients.

The data from the “survey” portion (which excludes estimates derived from administrative sources) reflected in the table below, show a decline in both salaries, wages and benefits of employees (from 48% to 46%) and office expenses (from 14% to 12%) as a percentage of total operating expenses when compared to 2005.

**Chart 13**

**Type of expense as a percentage of total operating expenses for consulting services**

percent



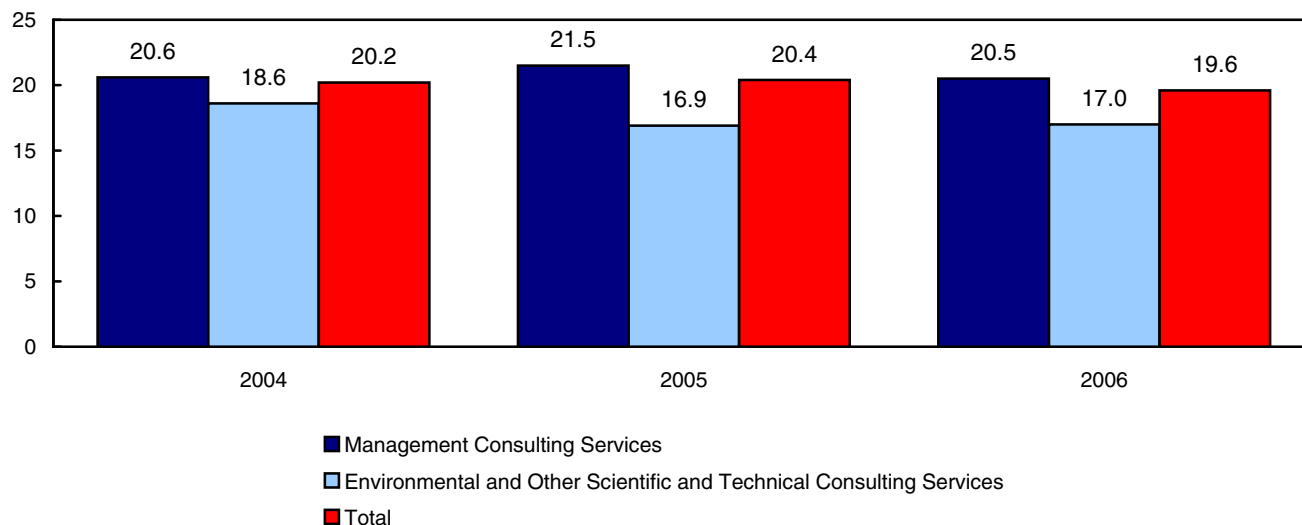
## Operating Profits

The operating profit margin for the consulting services industry declined slightly to 19.6% in 2006. This compares to the profit margins posted in 2005 and 2004 which were 20.4% and 20.2% respectively. The operating profit margin is generally higher for the management consulting services industry (20.5% in 2006) than for the environmental and other scientific and technical consulting services industry (17.0% in 2006).



**Chart 14**  
**Operating profit margin**

percent

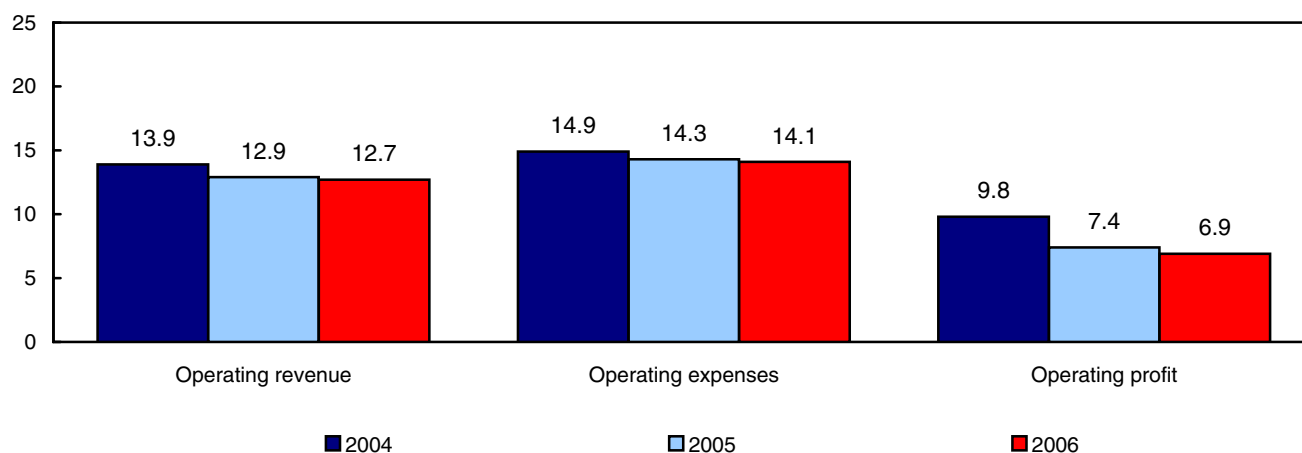


### Industry's 20 Largest Firms

The consulting industry is not a concentrated industry and is mostly made up of a lot of small firms. In 2006, the 20 largest businesses generated 12.7% of total industry operating revenue, down slightly from 12.9% in 2005. The top 20 firms' share in operating expenses also saw some fluctuation in 2006 (14.1% from 14.3% in 2005) while their share of operating profits fell slightly to 6.9% (from 7.4% in 2005).

**Chart 15**  
**Share of the industry's 20 largest firms for consulting services**

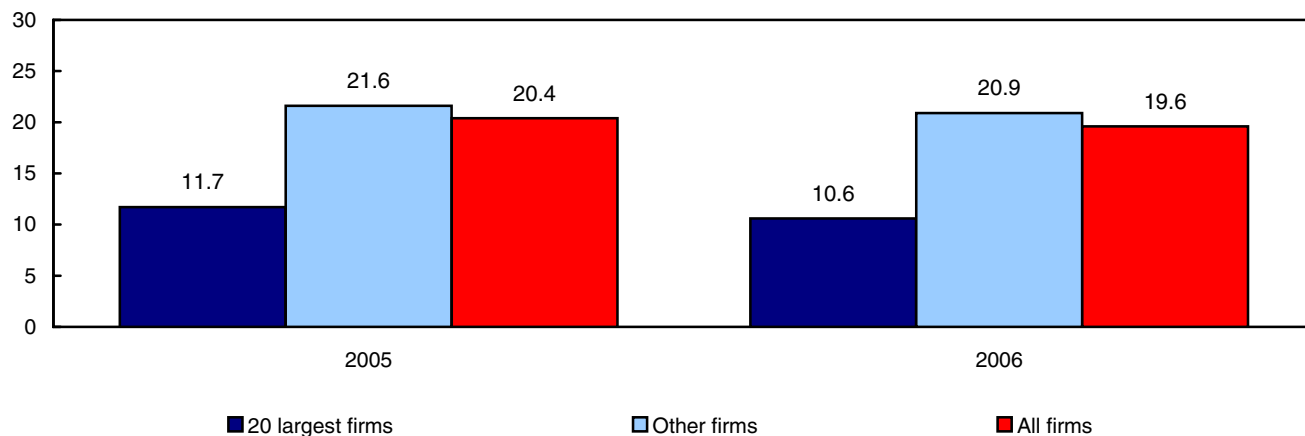
percent



The operating profit margin of the top 20 firms was 10.6% in 2006 (down from 11.7% in 2005), which is about half as profitable as the remaining firms, which posted a 20.9% profit margin in 2006 (down from 21.6% in 2005).

**Chart 16**  
Operating profit margin for consulting services

percent

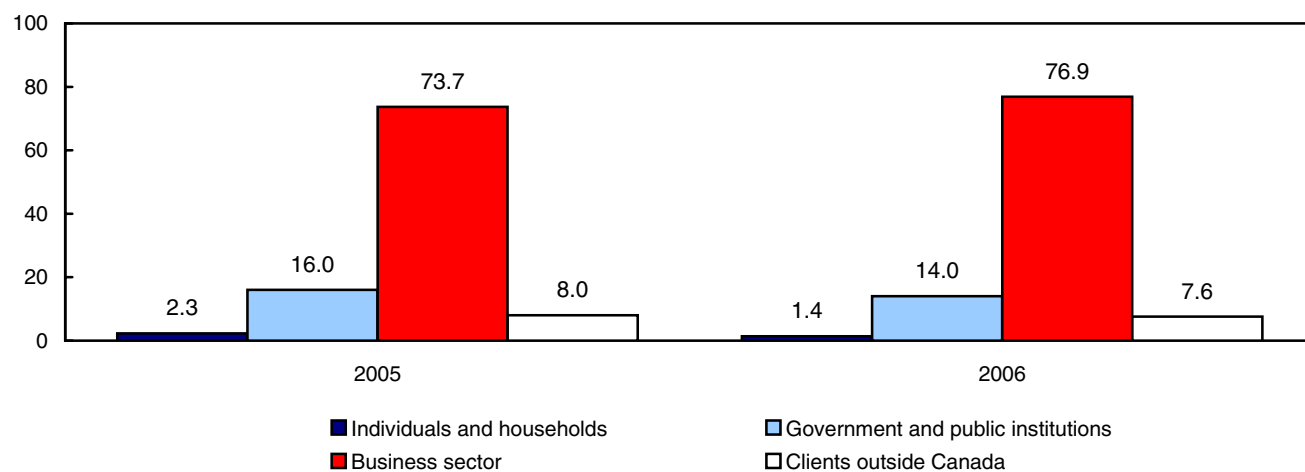


### Client Base

Most of the sales (77%) of consulting services firms in 2006 were to other Canadian firms.

**Chart 17**  
Sales by type of client for consulting services

percent



## Statistical tables

Table 1

Summary statistics for the management consulting services industry, 2001 to 2006

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
<b>2006 p</b>				
Newfoundland and Labrador	20.0	15.6	6.2	22.2
Prince Edward Island	x	x	x	x
Nova Scotia	90.9	66.5	35.4	26.8
New Brunswick	30.1	21.9	9.7	27.2
Quebec	1,372.5	1,018.3	421.3	25.8
Ontario	4,019.2	3,265.2	1,453.1	18.8
Manitoba	119.2	88.6	46.2	25.7
Saskatchewan	94.1	75.4	30.8	19.9
Alberta	1,087.6	849.6	349.2	21.9
British Columbia	983.0	812.2	378.3	17.4
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
<b>Canada</b>	<b>7,836.8</b>	<b>6,228.0</b>	<b>2,736.2</b>	<b>20.5</b>
<b>2005 r</b>				
Newfoundland and Labrador	17.5	13.7	6.2	21.8
Prince Edward Island	x	x	x	x
Nova Scotia	87.4	67.9	32.3	22.3
New Brunswick	25.5	18.9	7.0	25.9
Quebec	1,223.0	965.9	449.5	21.0
Ontario	3,751.4	2,935.7	1,263.6	21.7
Manitoba	103.1	74.9	37.3	27.3
Saskatchewan	85.1	70.6	35.6	16.9
Alberta	965.3	752.4	365.9	22.1
British Columbia	837.6	668.2	287.8	20.2
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
<b>Canada</b>	<b>7,116.9</b>	<b>5,585.3</b>	<b>2,491.7</b>	<b>21.5</b>
<b>2004 r</b>				
Newfoundland and Labrador	17.7	13.9	6.4	21.4
Prince Edward Island	x	x	x	x
Nova Scotia	80.7	58.0	26.9	28.1
New Brunswick	26.9	21.1	8.9	21.4
Quebec	1,271.6	988.1	434.7	22.3
Ontario	3,529.9	2,780.6	1,143.1	21.2
Manitoba	107.7	80.3	40.0	25.4
Saskatchewan	70.5	56.5	24.5	19.9
Alberta	808.3	674.3	314.0	16.6
British Columbia	751.6	616.6	273.5	18.0
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
<b>Canada</b>	<b>6,683.0</b>	<b>5,304.4</b>	<b>2,278.1</b>	<b>20.6</b>

Table 1 – continued

## Summary statistics for the management consulting services industry, 2001 to 2006

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
<b>2003</b>				
Newfoundland and Labrador	18.1	14.3	6.5	20.9
Prince Edward Island	x	x	x	x
Nova Scotia	67.4	51.6	24.8	23.5
New Brunswick	x	x	x	x
Quebec	1,301.3	1,072.8	449.1	17.6
Ontario	3,430.8	2,800.0	1,231.2	18.4
Manitoba	115.1	95.0	38.7	17.5
Saskatchewan	75.0	66.3	31.7	11.6
Alberta	786.9	657.7	281.3	16.4
British Columbia	778.6	645.6	265.7	17.1
Yukon	x	x	x	x
Northwest Territories	x	x	x	x
Nunavut	x	x	x	x
<b>Canada</b>	<b>6,634.4</b>	<b>5,449.6</b>	<b>2,347.4</b>	<b>17.9</b>
<b>2002</b>				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	x	x	x	x
Nova Scotia	73.7	50.3	21.2	31.7
New Brunswick	31.3	24.3	11.3	22.2
Quebec	1,239.9	966.2	410.4	22.1
Ontario	3,608.1	2,946.3	1,250.3	18.3
Manitoba	99.5	74.6	29.8	25.0
Saskatchewan	55.2	45.4	20.5	17.8
Alberta	776.6	641.3	303.5	17.4
British Columbia	783.0	628.1	276.6	19.8
Yukon	3.2	2.5	1.3	22.4
Northwest Territories	11.2	8.6	3.6	22.9
Nunavut	x	x	x	x
<b>Canada</b>	<b>6,710.1</b>	<b>5,410.0</b>	<b>2,338.1</b>	<b>19.4</b>
<b>2001</b>				
Newfoundland and Labrador	x	x	x	x
Prince Edward Island	8.0	6.5	2.2	18.5
Nova Scotia	58.4	44.6	20.6	23.7
New Brunswick	37.8	30.8	15.8	18.5
Quebec	1,298.4	1,057.0	485.1	18.6
Ontario	3,493.8	2,784.2	1,353.4	20.3
Manitoba	111.8	96.1	39.1	14.0
Saskatchewan	55.1	45.1	23.1	18.2
Alberta	715.7	614.5	322.7	14.1
British Columbia	698.5	569.3	269.4	18.5
Yukon	2.3	1.7	0.9	28.4
Northwest Territories	12.5	10.2	3.4	18.0
Nunavut	x	x	x	x
<b>Canada</b>	<b>6,514.8</b>	<b>5,278.3</b>	<b>2,544.2</b>	<b>19.0</b>

**Note(s):** According to the North American Industry Classification System (NAICS 54161). 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 2**  
**Sales by goods and services for the surveying and mapping industry,<sup>1</sup> Canada, 2001 to 2006**

	2005 <sup>r</sup>	2006 <sup>p</sup>
	percent	
<b>Geophysical Surveying and/or Mapping Services</b>	<b>48.4</b>	<b>46.9</b>
Surveying (data acquisition, processing or interpretation)	44.6	44
Mapping and cartography	1.6	1.6
Geophysical Consulting Services	2.2	1.3
<b>Non-geophysical surveying and/or mapping services</b>	<b>47.4</b>	<b>49.5</b>
Surveying (e.g., land, cadastral, hydrographic, topographic, marine, engineering)	36.2	36.7
Mapping and cartography (e.g., photogrammetry, charting)	6.4	4.8
Remote sensing (e.g., airborne, satellite, radar, lidar)	2.8	3.9
Surveying and mapping consulting services	2.1	4.1
<b>Other Goods and Services</b>	<b>4.2</b>	<b>3.5</b>
<b>Total</b>	<b>100.0</b>	<b>100.0</b>

1. 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.  
**Note(s):** According to the North American Industry Classification System (NAICS 5413). 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 3**  
**Operating expenses for the consulting services industry,<sup>1</sup> Canada, 2001 to 2006**

	2001	2002	2003	2004 <sup>r</sup>	2005 <sup>r</sup>	2006 <sup>p</sup>
	percent					
Wages, salaries and employee benefits	52.8	47.2	47.7	49.3	48.1	45.8
Commissions paid to non employees, professional and business service fees and outsourcing	17.8	19.3	16.4	17.7	19.1	18.8
Office expenses	11.9	11.4	10.8	11.4	13.6	12.4
Rental and leasing	5.2	5.0	5.1	5.1	4.0	3.5
Depreciation	2.3	2.4	2.3	2.4	2.6	2.4
Other expenses	9.9	14.7	17.7	14.0	12.6	17.1
<b>Total operating expenses</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

1. 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.  
**Note(s):** According to the North American Industry Classification System (NAICS 5613). 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**  
**Sales by type of client for the consulting services industry,<sup>1</sup> Canada, 2001-2006**

	2001	2002	2003	2004 <sup>r</sup>	2005 <sup>r</sup>	2006 <sup>p</sup>
	percent					
<b>Clients in Canada</b>	<b>89.6</b>	<b>90.1</b>	<b>92.2</b>	<b>90.9</b>	<b>92.0</b>	<b>92.4</b>
Individuals and households	2.2	2.7	3.1	2.8	2.3	1.4
Governments and public institutions	17.1	17.7	19.5	16.7	16.0	14.0
Businesses	70.4	69.6	69.6	71.4	73.7	76.9
<b>Clients outside Canada (exports)</b>	<b>10.4</b>	<b>9.9</b>	<b>7.8</b>	<b>9.1</b>	<b>8.0</b>	<b>7.6</b>
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

1. 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.  
**Note(s):** According to the North American Industry Classification System (NAICS 5613). See "Data sources, definitions and methodology" at the end of tables for definition of terms. Due to rounding, components may not add to total.

## Data sources, définitions and methodology

### Description

This annual sample survey collects the financial and operating data needed to produce statistics on the Consulting Services in Canada. The survey also collects detailed information on the characteristics of the businesses, such as type of revenue and type of client. These data are aggregated with information from other sources to produce official estimates of the national and provincial economic production of the Consulting Services industry in Canada. The results from this survey provide data to businesses, governments, investors, and associations. These data allow these groups to monitor the growth of the industry, measure performance, allow comparison across similar businesses and to better understand this industry to react to trends and patterns.

### Target population

The target population consists of all establishments classified to the Consulting Services industry (NAICS 5416) according to the North American Industry Classification System (NAICS) during the reference year. This industry comprises establishments primarily engaged in providing a range of consulting services, such as management, environmental, scientific and technical consulting services.

### Industry structure

Under the North American Industrial Classification System (NAICS), the Consulting Services Industry consists of Administrative Management and General Management Consulting Services (541611), Human Resources Consulting Services (541612), Other Management Consulting Services (541619), Environmental Consulting Services (541620) and Other Scientific and Technical Consulting Services (541690).

### Management Consulting Services – NAICS 54161

This industry is the grouping of Administrative Management and General Management Consulting Services (541611), Human Resources Consulting Services (541612) and Other Management Consulting Services (541619). This industry comprises establishments primarily engaged in providing advice and assistance to other organizations on management issues, such as strategic and organizational planning; financial planning and budgeting; marketing objectives and policies; human resource policies, practices and planning; and production scheduling and control planning.

### Environmental and Other Scientific and Technical Consulting Services – NAICS 54162 and 54169

This industry is the grouping of Environmental Consulting Services (541620) and Other Scientific and Technical Consulting Services (541690). The Environmental Consulting Services industry comprises establishments primarily engaged in providing advice and assistance to other organizations on environmental issues such as the control of environmental contamination from pollutants, toxic substances and hazardous materials. The Other Scientific and Technical Consulting Services industry comprises establishments primarily engaged in providing advice and assistance to other organizations on scientific and technical issues. These establishments provide services such as agricultural, agrology, agronomy, economic, energy, hydrology, livestock breeding, motion picture, nuclear energy, occupational health and safety consulting services.

The main activity of an enterprise engaged in consulting services is to provide expert advice and to make recommendations to client firms on matters such as the adoption of approaches and processes and the establishment of strategies. For the benefit of client firms, such a consulting enterprise **can** also undertake the work itself that arises from its own recommendations (i.e. their actual implementation). However, for this survey, to be considered as a consulting enterprise, the enterprise **must** generate the majority of its revenues from advice that it provides to client firm and **not** from the **implementation** of its own recommendations.

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 the Introduction section of the Statistics Canada publication “North American Industry Classification System: Canada 2007” (catalogue no. 12-501-XPE).

## Sampling

This is a sample survey.

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 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 2006 was 2,773 collection entities.

## Quality evaluation

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.

**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.

## 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 86%. CVs were calculated for each estimate. The CVs are available upon request.

**Related products****CANSIM**

Available on CANSIM: table 360-0001 - Summary statistics for consulting services (all establishments), by North American Industry Classification System (NAICS), annual (225 series)

**Survey(s)**

Definitions, data sources and methods: survey number 4717 - Annual Survey of Service Industries: Consulting Services

**Publications**

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

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



Release date: August 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 <sup>s</sup>	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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