

Service bulletin

Employment Services

2007



Highlights

- The Employment Services industry demonstrated strong growth in 2007, continuing a trend seen over the past several years, reflected in an operating revenue increase of 10.8% to \$8.9 billion. This illustrates the benefit accruing to employment placement and staffing agencies from a tighter labour market and a strong national economy. This growth follows strong operating revenue increases of 8.5% in 2006, 18.1% in 2005, and 10.2% in 2004.
- In 2007 the growth in operating revenues was particularly strong in Newfoundland and Labrador (+35.8%), Ontario (+14.7%), British Columbia (+11.3%), Saskatchewan (+11.1%), and New Brunswick (+9.8%). Growth in Alberta was slower this year at 5.4% after very strong growth of 25.3% in 2006. In Quebec the growth rate was 3.0%, very similar to the 3.2% noted in 2006. Declines in revenue in 2007 over 2006 were seen in Nova Scotia (-6.8%) and in Manitoba (-10.1%).
- Ontario continues to dominate the industry's operating revenues with a 59.1% share of the national industry in 2007. This is an increase from 57.1% in 2006 reversing a decline noted since 2001 when it held a 62.1% share. During this same period from 2001 to 2007, British Columbia saw its share increase from 4.9% to 7.1%, Alberta's share grew from 13.4% to 16.7%, and Quebec's share declined from 15.6% to 13.7%.
- In 2007 the industry's operating expenses grew by 10.2%, however as this was lower than the 10.8% increase in operating revenue, this resulted in an increase in the operating profit margin from 3.5% in 2006 to 4.1%. Salaries, wages and benefits of employees increased by only 1.7% and accounted for 67.2% of the total operating expenses.
- In 2007, for the Employment Services industry as a whole, 61.6% of sales were generated from temporary staffing services, with 34.1% from permanent placement and contract staffing services, and the remaining 4.3% from other goods and services. While temporary staffing services still dominate the industry, their share of sales has declined substantially from 79.0% in 2004. Over this same time period there has been a significant growth from 19.3% in 2004 to 34.1% in 2007 from permanent placement and contract staffing services.
- As noted in prior years, in 2007 the vast majority (86.0%) of industry sales were made to the business sector, with the government and public institutions sector following at 11.8%, and the remaining 2.2% accounted for by individuals and households, and clients outside Canada.
- This is a very stable industry dominated by a small number of large firms. In 2007 the 20 largest firms generated 38% of total industry operating revenue, down slightly from 39% in 2006, with their operating profit margin of 4.1% being essentially the same as that for the remaining firms at 4.0%.

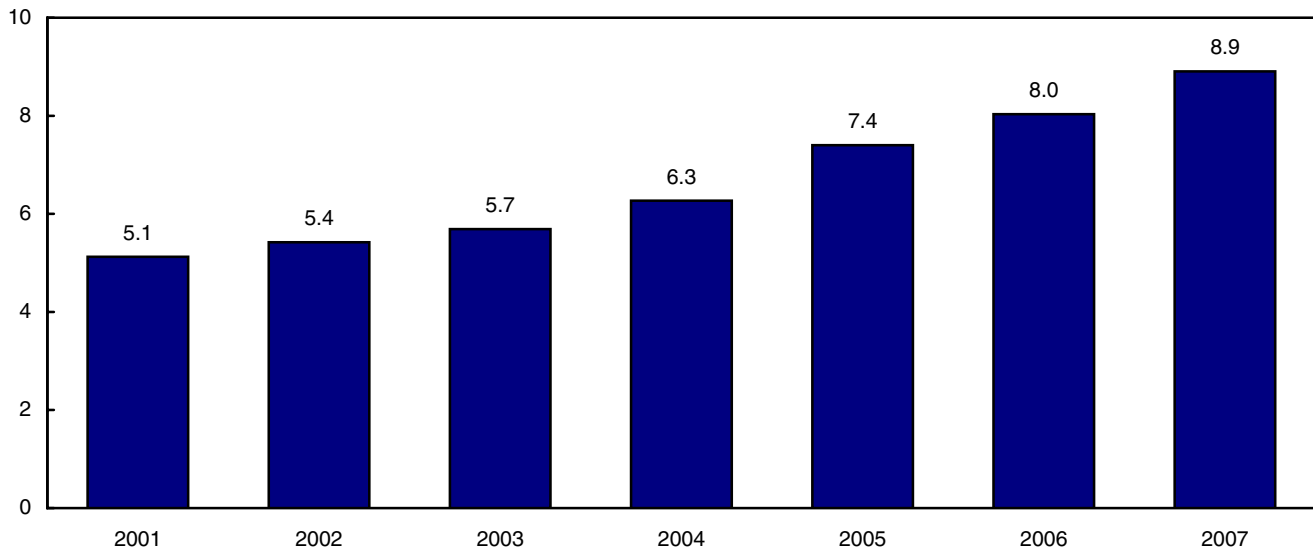
Detailed Results of 2007 Survey

Total Operating Revenues

The Employment Services industry demonstrated significant growth in 2007, with operating revenues increasing by 10.8% over 2006 to \$8.9 billion. This growth reflected a tighter labour market and strong demand for the services of employment placement and staffing firms. As illustrated in data from Statistics Canada's Labour Force Survey, the national unemployment rate declined in each of the five years between 2003, when it was at 7.6%, to 2007, when it reached a low of 6.0%.

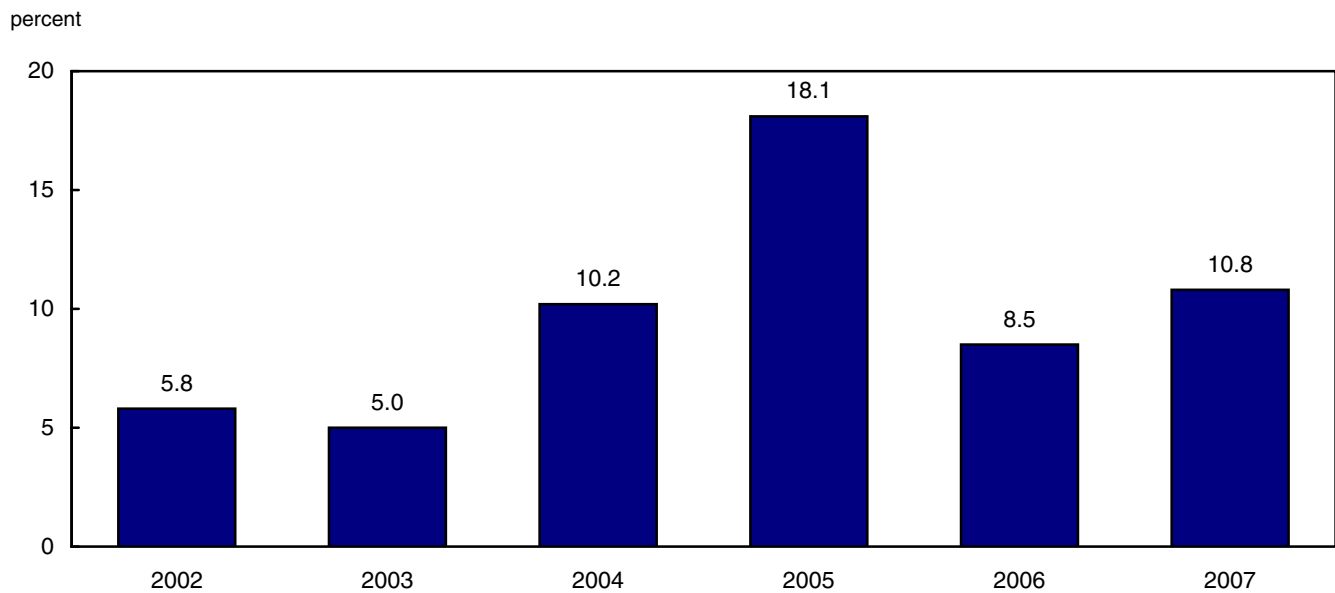
Chart 1
Operating revenues of the employment services industry

billions of dollars



The growth in 2007 in the Employment Services industry continues a trend of substantial operating revenue increases of 8.5% in 2006, 18.1% in 2005, and 10.2% in 2004.

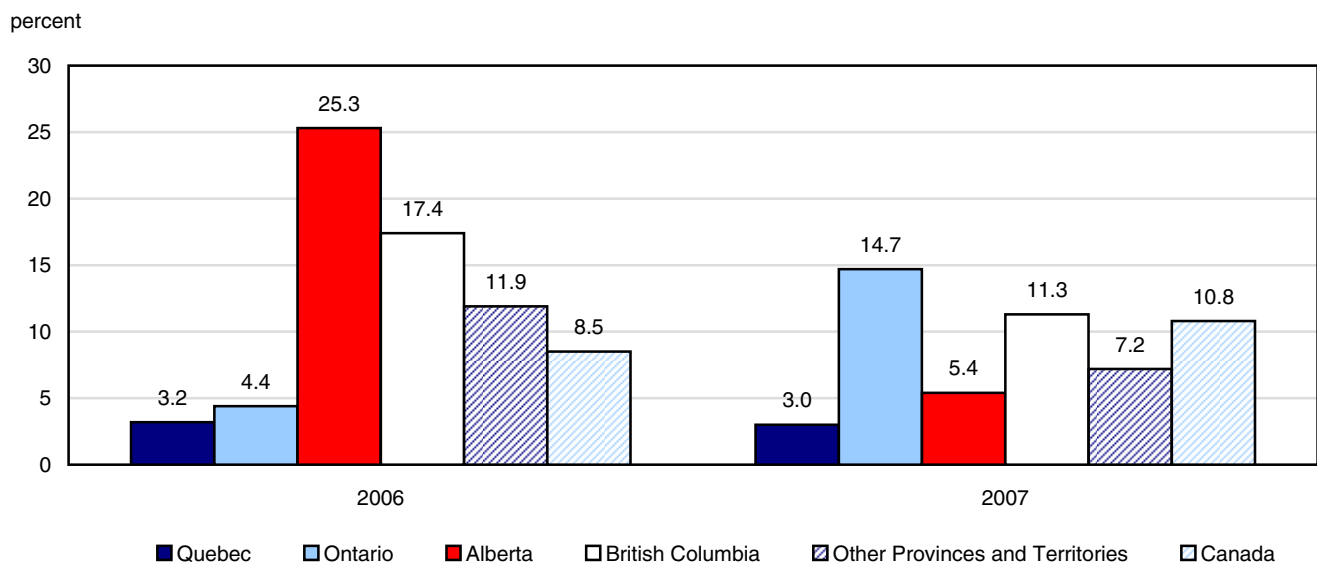
Chart 2
Percentage growth of operating revenues of the employment services industry



Total Operating Revenues by Province

In 2007 the growth in operating revenues was particularly strong in Newfoundland and Labrador (+35.8%), Ontario (+14.7%), British Columbia (+11.3%), Saskatchewan (+11.1%), and New Brunswick (+9.8%). Growth in Alberta was slower this year at 5.4% after very strong growth of 25.3% in 2006. In Quebec the growth rate was 3.0%, very similar to the 3.2% noted in 2006. Declines in revenue in 2007 over 2006 were seen in Nova Scotia (-6.8%) and in Manitoba (-10.1%).

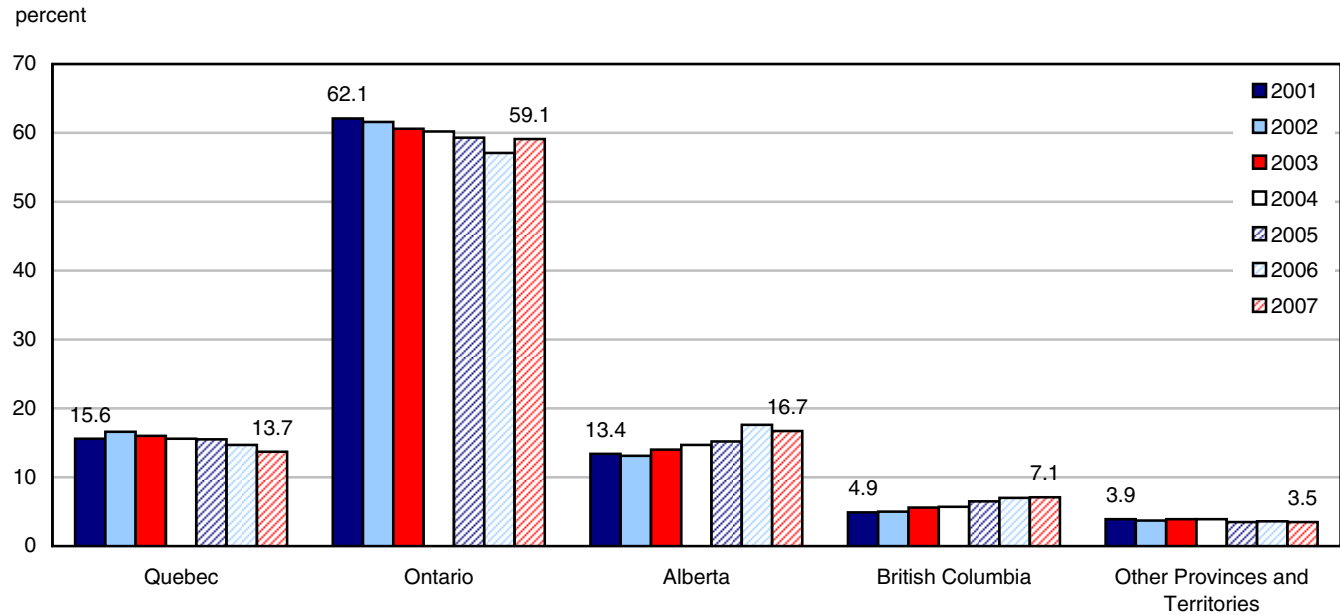
Chart 3
Percentage growth of operating revenues of the employment services industry



Ontario continues to dominate the industry’s operating revenues with a 59.1% share of the national industry in 2007. This is an increase from 57.1% in 2006 reversing a decline noted since 2001 when it held a 62.1% share. During this same period from 2001 to 2007, British Columbia saw its share increase from 4.9% to 7.1%, and Alberta’s share grew from 13.4% to 16.7%, with Quebec’s share declining from 15.6% to 13.7%.

The total operating revenue of the remaining provinces and territories accounted for only 3.5% or \$308 million of the national total in 2007.

Chart 4
Provincial distribution of operating revenues of the employment services industry

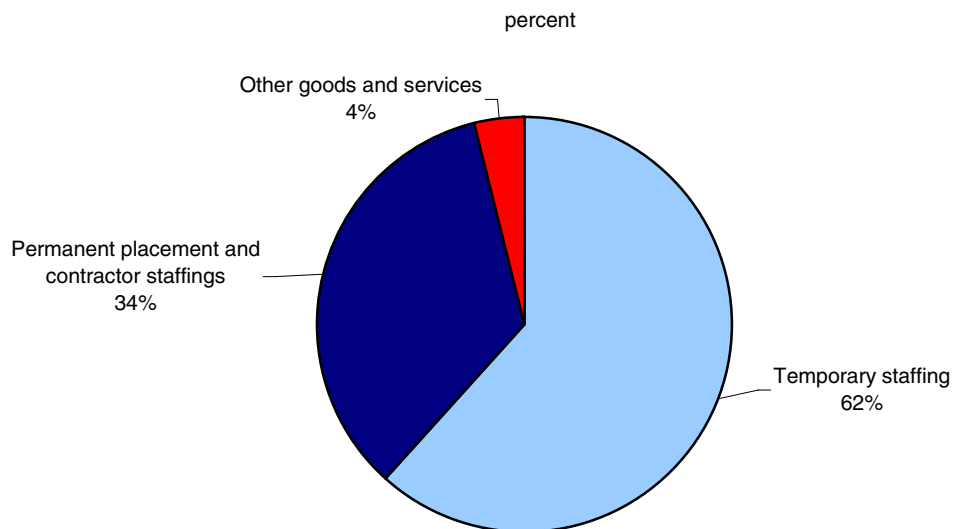


Sales by Type of Goods and Services

The data from the “sampled”¹ portion of the industry show that in 2007 for the Employment Services industry as a whole, 62% of sales were generated from temporary staffing services, with 34% from permanent placement and contract staffing services, and the remaining 4% from other goods and services. As reflected in Table 4, following stability for 2001 – 2004, the shares of sales by type of goods and services have gradually but substantially changed since then. While temporary staffing services still dominate the industry, their share of sales has declined from 79% in 2004 to 62% in 2007. Over this same time period there has been a significant growth from 19% in 2004 to 34% in 2007 in permanent placement and contract staffing services.

1. The smallest firms, in terms of revenues earned, are not included in these estimates. These firms account for a relatively small portion of total industry revenues.

Chart 5
Sales by type of goods and services of the employment services industry



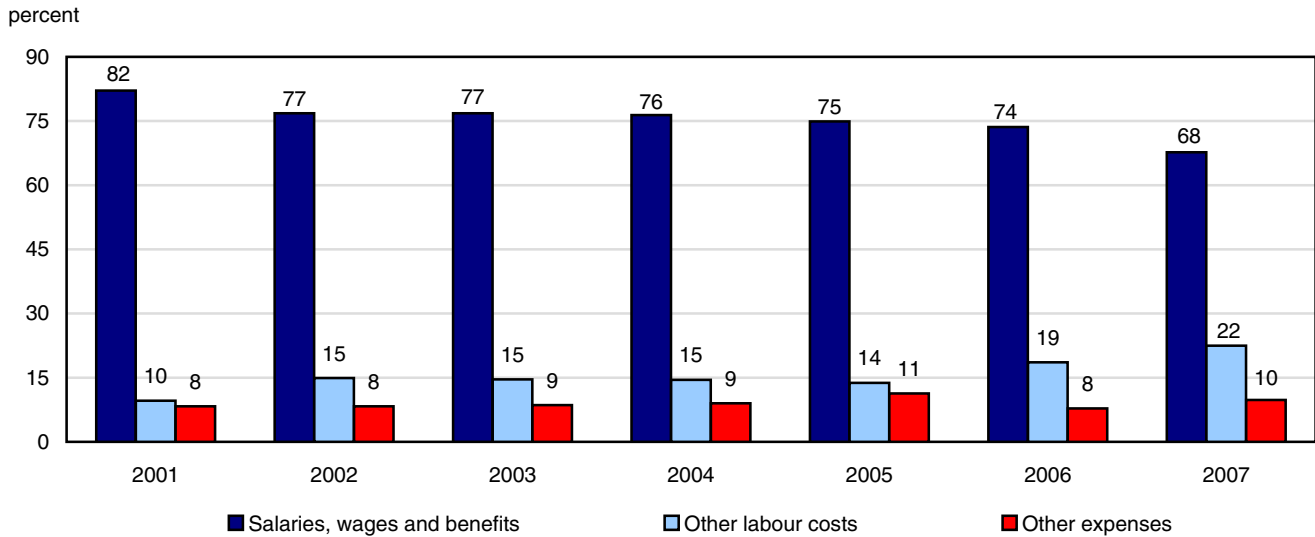
Industry Operating Expenditures

In 2007 the industry's operating expenses grew by 10.2%, while operating revenues grew by 10.8%, resulting in an increase in the operating profit margin from 3.5% in 2006 to 4.1% in 2007. Salaries, wages and benefits of employees increased by only 1.7% to \$5.7 billion, and accounted for 67.2% of the total operating expenses.

The data from the "sampled"² portion of the industry show that salaries, wages and benefits of employees as a percentage of total operating expenses had been very stable since 2002, but decreased noticeably in 2007 to 68%. Other labour costs (commissions paid to non-employees, professional and business fees, and subcontract expenses) have increased substantially from 14% in 2005, to 19% in 2006, and to 22% in 2007, a growth in line with the increase of the proportion of permanent placement and contract staffing sales to total sales.

2. The smallest firms, in terms of revenues earned, are not included in these estimates. These firms account for a relatively small portion of total industry revenues.

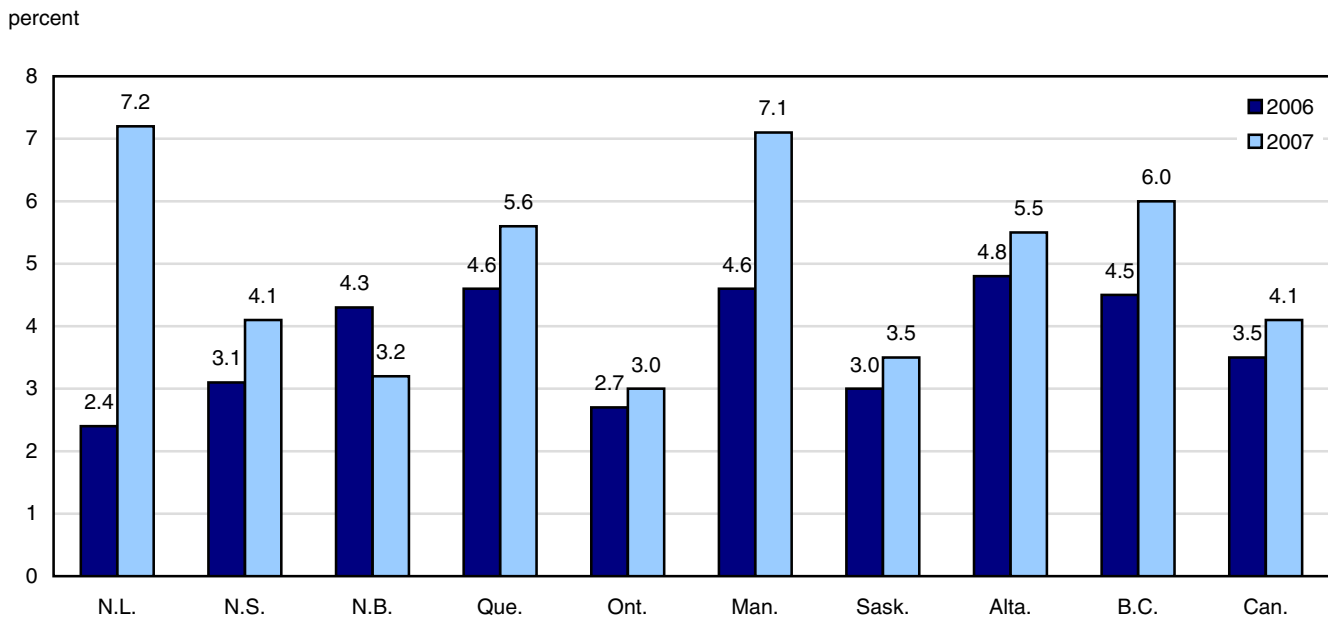
Chart 6
Expenses as a percentage of operating expenses of the employment services industry



Operating Profits

The national operating profit margin for the Employment Services industry increased to 4.1% in 2007 from 3.5% in 2006. The chart below illustrates the profit margin by province and shows that almost all jurisdictions saw profit margin increases in 2007.

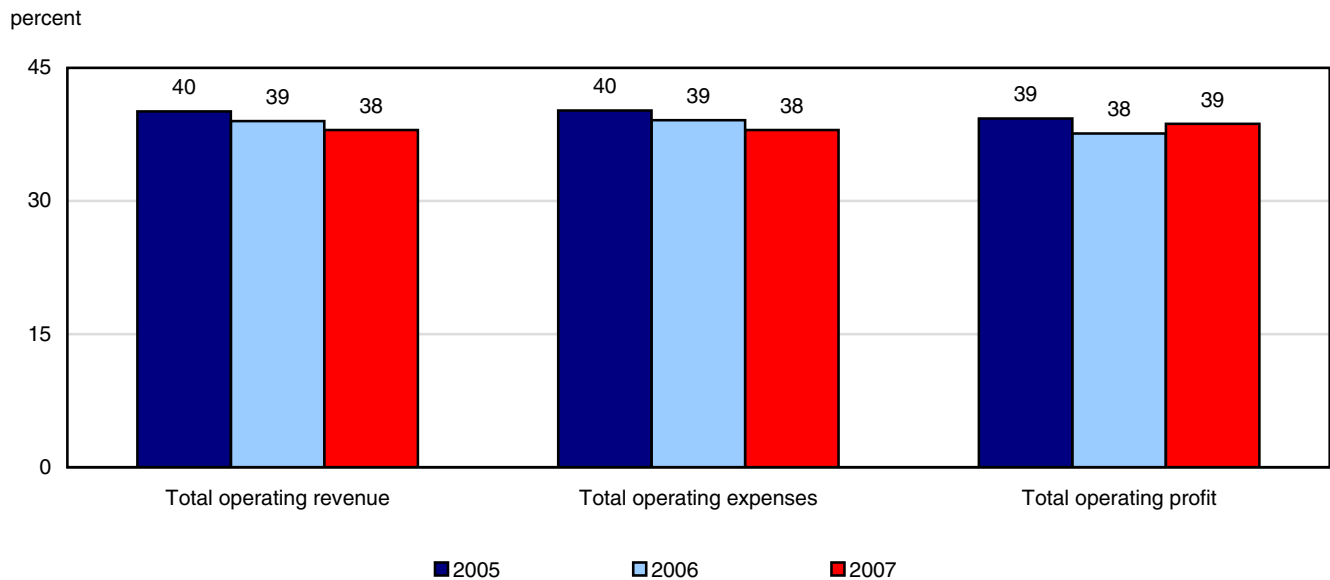
Chart 7
Operating profit margin of the employment services industry



The Industry's 20 Largest Firms

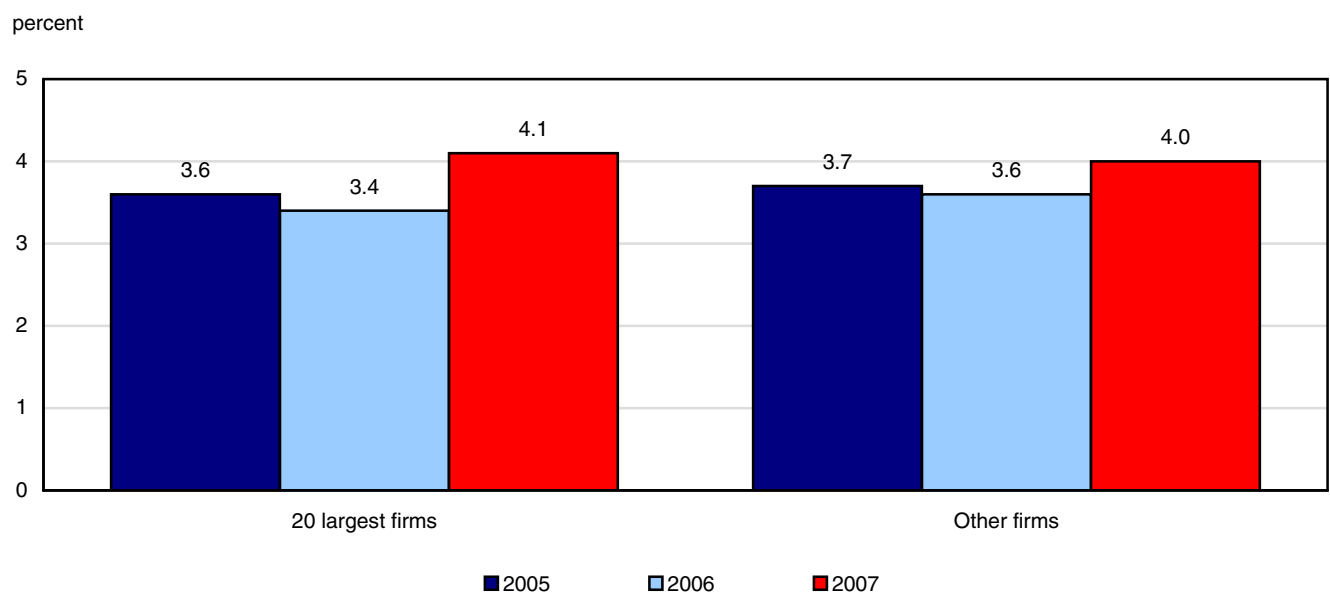
This is a very stable industry dominated by a small number of large firms. In 2007 the 20 largest firms by operating revenue generated 38% of total industry operating revenue, down slightly from 39% in 2006.

Chart 8
Share of the employment services industry's 20 largest firms



From 2006 to 2007 the operating profit margin of the 20 largest firms increased from 3.4% to 4.1%. This was very similar to the figures for the remaining firms which experienced a growth in their operating profit margin from 3.6% to 4.0% over this same period.

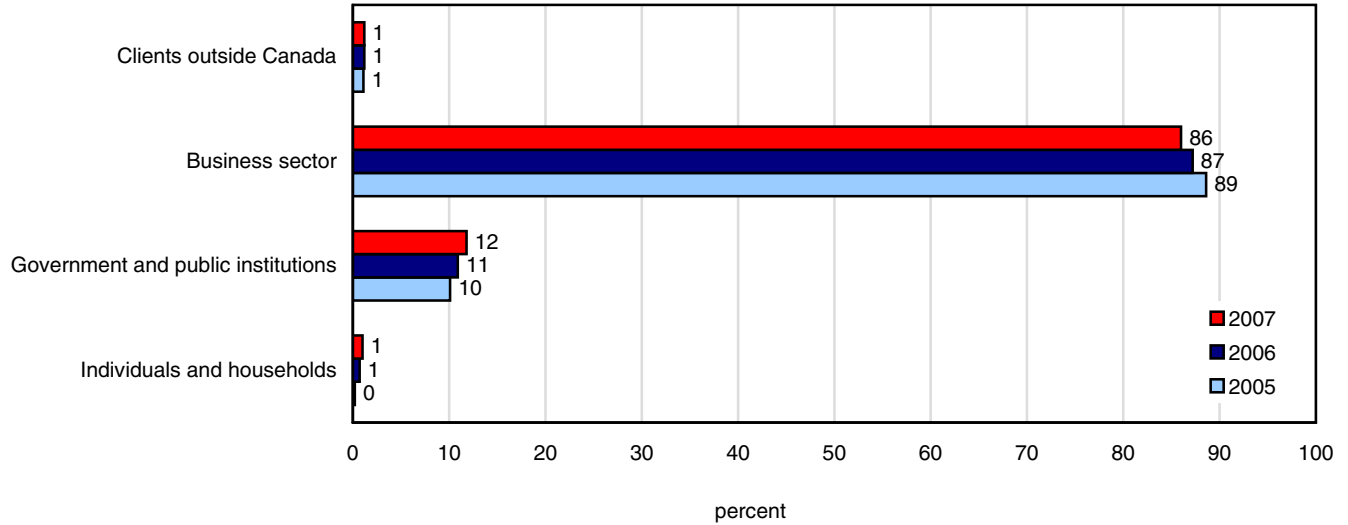
Chart 9
Operating profit margin of the employment services industry



Client Base

In 2007 the data from the “sampled”³ portion of the industry indicated that the vast majority (86%) of industry sales were made to the business sector, down slightly from 87% in 2006 and 89% in 2005. The government and public institutions sector was 12%, showing a slight increase from 11% in 2006, with the remaining 2% accounted for by individuals and households, and clients outside Canada, similar to the share seen in 2006.

Chart 10
Sales by type of client of the employment services industry



3. The smallest firms, in terms of revenues earned, are not included in these estimates. These firms account for a relatively small portion of total industry revenues.

Statistical tables

Table 1

Summary statistics for the employment services industry, by province and territory, 2005 to 2007

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin	Statistical establishments
	millions of dollars			percent	number
2007 p					
Newfoundland and Labrador	66.4	61.6	54.3	7.2	34
Prince Edward Island	x	x	x	x	x
Nova Scotia	62.1	59.5	48.4	4.1	63
New Brunswick	71.2	68.9	59.3	3.2	41
Quebec	1,217.3	1,149.7	868.2	5.6	1,137
Ontario	5,260.7	5,103.3	3,218.5	3.0	2,343
Manitoba	61.1	56.7	48.3	7.1	76
Saskatchewan	41.4	39.9	34.6	3.5	37
Alberta	1,489.8	1,407.1	990.4	5.5	465
British Columbia	628.2	590.5	415.8	6.0	492
Territories ¹	x	x	x	x	x
Canada	8,904.0	8,542.6	5,741.1	4.1	4,698
2006 r					
Newfoundland and Labrador	48.9	47.7	42.0	2.4	33
Prince Edward Island	x	x	x	x	x
Nova Scotia	66.6	64.5	54.9	3.1	60
New Brunswick	64.8	62.0	57.7	4.3	45
Quebec	1,181.5	1,127.1	828.3	4.6	1,164
Ontario	4,587.3	4,464.4	3,185.7	2.7	2,085
Manitoba	68.0	64.9	57.6	4.6	84
Saskatchewan	37.2	36.1	32.1	3.0	36
Alberta	1,413.3	1,345.4	964.6	4.8	395
British Columbia	564.2	538.7	419.6	4.5	477
Territories ¹	x	x	x	x	x
Canada	8,033.7	7,752.8	5,644.2	3.5	4,383
2005					
Newfoundland and Labrador	36.1	35.1	30.0	2.8	32
Prince Edward Island	x	x	x	x	x
Nova Scotia	64.1	61.9	56.1	3.5	61
New Brunswick	66.4	65.0	61.5	2.2	46
Quebec	1,144.4	1,100.1	862.1	3.9	1,179
Ontario	4,392.3	4,242.3	2,981.9	3.4	2,077
Manitoba	59.2	55.3	48.0	6.6	82
Saskatchewan	29.1	27.9	24.8	4.1	36
Alberta	1,127.9	1,083.2	856.3	4.0	371
British Columbia	480.6	458.3	346.0	4.6	471
Territories ¹	x	x	x	x	x
Canada	7,402.0	7,130.8	5,268.0	3.7	4,360

1. Territories include: Yukon Territory, Northwest Territories and Nunavut.

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.

Table 2
Expenditures as a percentage of total operating expenses for the employment services industry,¹ Canada, 2005 to 2007

	percent
Salaries, wages and benefits	
2007 p	67.7
2006 r	73.6
2005	74.9
Other labour costs	
2007 p	22.5
2006 r	18.6
2005	13.8
Rental, leasing, utilities and telecommunications	
2007 p	1.6
2006 r	1.5
2005	1.4
Repair and maintenance expenses	
2007 p	0.4
2006 r	0.3
2005	0.3
Depreciation charges of tangible and intangible assets	
2007 p	0.4
2006 r	0.4
2005	0.4
Advertising, marketing, promotions, travel, meals and entertainment	
2007 p	1.4
2006 r	1.3
2005	1.2
Other purchased goods and services	
2007 p	2.0
2006 r	1.6
2005	3.5
Other operating expenses	
2007 p	4.0
2006 r	2.7
2005	4.4

1. The smallest firms, in terms of revenues earned, are not included in the estimates of this table. 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.

Table 3
Sales by type of client for the employment services industry,¹ Canada, 2005 to 2007

	percent
Clients in Canada	
2007 ^p	98.8
2006 ^r	98.8
2005	98.9
Individuals and households	
2007 ^p	1.0
2006 ^r	0.7
2005	0.2
Government and public institutions	
2007 ^p	11.8
2006 ^r	10.9
2005	10.1
Business sector	
2007 ^p	86.0
2006 ^r	87.2
2005	88.6
Clients outside Canada	
2007 ^p	1.2
2006 ^r	1.2
2005	1.1

1. The smallest firms, in terms of revenues earned, are not included in the estimates of this table. 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.

Table 4
Sales by type of goods and services for the employment services industry,¹ Canada, 2005 to 2007

	2005	2006 ^r	2007 ^p
	percent		
Temporary Staffing	77.2	70.3	61.8
Permanent Placements and Contract Staffing	21.7	28.4	34.2
Other Goods and Services	1.1	1.3	4.0

1. The smallest firms, in terms of revenues earned, are not included in the estimates of this table. 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.

Data sources, definitions and methodology

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 a better understanding of the strengths and limitations of the data, and of how they can be effectively analysed and used. 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 agent having the responsibility and the authority to allocate resources in the production of goods and services.

An active **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.

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 only operates in one province, one industry and is a single legal entity.

In **complex businesses**, there may be an organisational unit above the establishment level but below the enterprise level. 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.

Survey Design

The target population for this survey consists of all statistical establishments (sometimes referred to as firms or units) classified in the Employment Services industry according to the North American Industry Classification System (NAICS) during the reference year 2007.

Industry Structure

Under the North American Industrial Classification System (NAICS), the Employment Services industry consists of Employment Placement Agencies and Executive Search Services (561310), Temporary Help Services (561320) and Professional Employer Organizations (561330).

Employment Placement Agencies and Executive Search Services – NAICS 561310

This industry group comprises establishments primarily engaged in listing employment vacancies and selecting, referring and placing applicants in employment on a permanent basis (indeterminate period) or on the basis of written contracts (assignment of contractors). The individuals placed are **not** employees of the placement agencies.

This type of establishment provides **permanent placement**, **executive search** and **contract staffing** services.

Permanent placement services consist of recruiting, selecting and referring candidates to a client to fill positions on a permanent (indeterminate) basis. The services provided may include testing, interviewing, reference checking, evaluation and counselling of prospective employees. The service provider acts as an employment intermediary. The candidate is selected and hired by the client. The placement firm is paid on a contingency basis meaning only for successful placement of a candidate. This product includes permanent placement services for a complete range of occupations from low-level employees to management employees, including executives. It includes domestic and international job placements.

Executive search services are defined as a specialized search and recruitment service limited to filling highly paid executive, senior manager, and professional positions, according to client specifications. Services may include:

- conducting detailed interviews with the client organization's management team;
- developing job profiles;
- conducting original research and advertising to locate potential job candidates;

- screening possible candidates;
- preparing, presenting, and discussing a confidential list of highly qualified applicants with the client;
- making interview arrangements;
- negotiating compensation; or
- providing post-hire follow-up.

The search firm typically provides two assurances to the client firm: to repeat the search at no extra charge (out-of-pocket expenses only) should a placed candidate subsequently fail for reasons attributed to lack of due diligence by the search firm, and not to recruit from the client firm for a stated period of time.

The client makes the decision as to which candidate to hire. The search agency's fee is charged whether or not the candidate is hired. This product is also known as retained search.

With the adoption of the NAICS 2007 classification, Executive Search Consulting Services were removed from Human Resources Consulting Services (541612) and reclassified to Employment Placement Agencies and Executive Search Services (561310).

Contract staffing services consist of finding individual contractors to fill positions on the basis of written contracts that stipulate the deliverables for which the client has contracted, as well as specific terms and conditions of employment. Under the terms of this agreement, the service provider has legal rights and duties with respect to the individual contractors. Not being employees of the employment placement agencies, the individual contractors are normally responsible for their own payroll deductions and government filings.

Temporary Staffing Services – NAICS 561320

This industry comprises establishments primarily engaged in supplying workers for limited periods of time to supplement the workforce of the client. The individuals provided are employees of the temporary staffing service establishment. These establishments do not provide direct supervision of their employees at the clients' work sites.

The main activity of these establishments is to supply personnel for temporary work assignments. The temporary staffing firm hires its own employees and assigns them to clients to support or supplement the client's workforce in work situations such as employee absences, temporary skill shortages, seasonal workloads, and special assignments and projects. When working, these employees are under the direct supervision of the client, but being on the payroll of the temporary staffing firm it is the temporary staffing firm that is legally responsible for their actions and that specifies their pay, benefits, etc.

Professional Employer Organizations – NAICS 561330

Professional Employer Organizations (PEO) comprises establishments primarily engaged in providing human resources and human resource management services to their clients. These establishments operate in a co-employment relationship (i.e., the rights and responsibilities of the employer are shared or allocated between the client firm and the PEO) with client businesses or organizations and are specialized in performing a wide range of human resource and personnel management duties, such as payroll accounting, payroll tax return preparation, benefits administration (retirement, life, dental and supplementary health insurance, etc.), recruiting, and managing labour relations (counselling, employee assessment, regulatory compliance, risk management, etc.).

Professional employer organizations typically acquire and lease back some or all of the employees of their clients and serve as the employer of the leased employees for payroll, benefits and related purposes. Professional employer organizations exercise varying degrees of decision making relating to their human resource or personnel management role, but do not have management accountability for the work of their clients' operations with regard to strategic planning, output or profitability.

Co-employment Services are a major employment service activity in the United States but they are not prevalent and are not expected to grow rapidly in Canada. This can be explained by the differences in the Canadian and American medical systems as well as Canadian laws governing employment. In regards to providing employee benefits, PEO arrangements in Canada do not result in the same degree of savings compared to the United States since most medical plans are publicly funded. Furthermore, Canadian provincial labour laws, the Workmen's Compensation Act and other legislation severely inhibit co-employment activities in this country.

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).

Sample Design and Frame

Even though the basic objective of the survey is to produce estimates for the whole industry, including 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 (the threshold varies between surveys and sometimes between provinces in the same survey). The establishments excluded from the sample represent an important proportion of the overall number (about 69%) but only account for about 9% of the overall income of the industry. The excluded establishments are accounted for in the overall and final estimates through the use of administrative data. However, only basic information such as total revenue, expenses, depreciation, and salaries, wages and benefits is obtained from administrative sources. Detailed characteristics such as the client base, revenue by type of services provided, 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., establishments coded with the same NAICS code, within the same province or territory. Quality requirements are targeted, and then each group is divided into four sub-groups called strata: take-all, must-take, take-some and take-none.

The take-all stratum includes the largest firms of the industry in terms of the size of their total revenue. 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/territory enterprises). The take-some stratum consists of a statistical sample of records that are selected randomly so as to represent the non-sampled records. The take-none stratum consists of the smallest units, and is not subject to sampling. Administrative data will be used for the take-none units.

The initial sample size for this survey was 543 collection entities, however, the *effective* sample size was 438 units after removing firms that had gone out of business, changed their primary business activity, were inactive, or were duplicated on the frame.

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/territory are aggregated to create a 'collection entity'. This reduces respondent burden and simplifies collection. Therefore, companies with production in more than one province/territory are mailed one questionnaire per province/territory 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 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 estimates, 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 analyzed for comparability. In general, this includes a detailed review of: individual responses (especially for the largest companies), general economic conditions, historical trends, and comparisons with administrative data (e.g., income tax, Goods and Services Tax, payroll deductions records, and 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 **weighted response rate** for this survey was 74.2% in reference year 2007, 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 this survey, the CVs are excellent (less than 5%) for the variables of operating revenues, operating expenses, and wages, salaries and benefits of employees. The CVs are available upon request.

Related products

CANSIM

Available on CANSIM: table 361-0001 - Summary statistics for employment services (all establishments), by North American Industry Classification System (NAICS), annual (75 series)

Survey(s)

Definitions, data sources and methods: survey number 4718 - Annual Survey of Service Industries: Employment

Publications

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

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

Release date: June 2009

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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