

Service bulletin

Surveying and Mapping Services

2009



Highlights

- Operating revenues for the surveying and mapping industry declined to \$2.2 billion, down 20.2% from 2008, amidst the economic recession of 2009. This drop follows two years of modest growth in 2007 and 2008, at 1.6% and 1.8%, respectively.
- Revenue decreases were recorded in most regions of Canada in 2009. The most significant decreases were recorded in Alberta (-29.1%), Saskatchewan (-21.1%), and Ontario (-14.9%). The smallest decrease was registered in Quebec (-5.8%) followed by British Columbia (-9.5%).
- Alberta continued to dominate the surveying and mapping industry in 2009 by generating 51% of total operating revenues in Canada. Nevertheless, as a result of three years of lower-than-average growth, Alberta's share declined from a high of 64.5% in 2006. Over the same period, Quebec (from 8.2% to 12.1%), Ontario (from 12.5% to 15.5%), British Columbia (from 8.5% to 10.4%) and Saskatchewan (from 2.3% to 3.4%) have all seen their shares increase.
- The decline in operating expenses (-12.4%) was at a much lower pace than that of operating revenues (-20.2%). As a result, the operating profit margin of the industry fell from 13.5% in 2008 to 5.0% in 2009. This drop is in contrast to the growth seen every year from 2002 to 2008.
- Industry sales were shared almost equally between geophysical and non-geophysical surveying and mapping services until 2009. Non-geophysical surveying and mapping services accounted for 55.9% of all sales, up from 48.5% in 2008, while geophysical surveying and mapping services generated 38.8% of total sales, down from 46.9% in 2008. The distribution of sales can vary by region across Canada.

Statistical tables

Table 1

Summary statistics for the surveying and mapping services industry, by province and territory, 2006 to 2009

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
2009 p				
Newfoundland and Labrador	25.0	25.6	14.0	-2.5
Prince Edward Island	x	x	x	x
Nova Scotia	31.9	27.1	16.5	15.0
New Brunswick	17.5	14.9	8.4	15.2
Quebec	270.2	227.2	113.9	15.9
Ontario	346.1	352.3	174.5	-1.8
Manitoba	28.2	24.6	7.4	12.9
Saskatchewan	76.6	60.0	30.4	21.6
Alberta	1,138.3	1,129.8	446.3	0.7
British Columbia	231.2	195.7	82.5	15.3
Territories ¹	x	x	x	x
Canada	2,231.4	2,120.2	904.3	5.0
2008 r				
Newfoundland and Labrador	30.5	29.3	13.9	3.9
Prince Edward Island	x	x	x	x
Nova Scotia	34.2	29.5	13.6	13.8
New Brunswick	20.9	17.3	10.2	17.4
Quebec	287.0	233.2	113.5	18.7
Ontario	406.8	374.5	178.2	8.0
Manitoba	30.5	26.2	9.2	14.0
Saskatchewan	97.1	80.4	34.1	17.2
Alberta	1,606.0	1,401.6	530.2	12.7
British Columbia	255.6	201.7	96.6	21.1
Territories ¹	x	x	x	x
Canada	2,798.3	2,421.3	1,011.0	13.5
2007 r				
Newfoundland and Labrador	25.2	22.1	13.7	12.5
Prince Edward Island	x	x	x	x
Nova Scotia	29.3	24.1	10.6	17.9
New Brunswick	14.0	11.6	7.3	17.4
Quebec	270.4	222.5	101.0	17.7
Ontario	380.3	344.2	163.9	9.5
Manitoba	26.7	20.4	8.7	23.4
Saskatchewan	85.5	70.5	33.1	17.6
Alberta	1,617.9	1,389.9	568.6	14.1
British Columbia	266.3	219.5	98.6	17.6
Territories ¹	x	x	x	x
Canada	2,747.2	2,353.3	1,017.4	14.3
2006				
Newfoundland and Labrador	16.8	14.7	8.1	12.6
Prince Edward Island	x	x	x	x
Nova Scotia	25.0	21.5	9.7	14.2
New Brunswick	12.3	10.4	6.5	15.5
Quebec	222.1	181.5	79.7	18.3
Ontario	337.2	311.0	163.6	7.8
Manitoba	21.8	19.2	7.7	12.1
Saskatchewan	61.0	52.2	24.6	14.4
Alberta	1,745.3	1,559.0	668.7	10.7
British Columbia	229.3	189.0	82.9	17.6
Territories ¹	x	x	x	x
Canada	2,704.5	2,390.9	1,065.3	11.6

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

Note(s): According to the North American Industry Classification System (NAICS 541360 + 541370). 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 surveying and mapping services industry,¹
Canada, 2006 to 2009

	percent
Salaries, wages and benefits	
2009 p	44.7
2008 r	42.9
2007 r	42.7
2006	45.5
Other labour costs	
2009 p	8.8
2008 r	10.7
2007 r	12.6
2006	8.2
Rental, leasing, utilities and telecommunications	
2009 p	7.0
2008 r	6.2
2007 r	6.1
2006	5.7
Repair and maintenance expenses	
2009 p	2.9
2008 r	3.5
2007 r	3.2
2006	2.1
Depreciation charges of tangible and intangible assets	
2009 p	9.6
2008 r	9.5
2007 r	9.2
2006	5.3
Advertising, marketing, promotions, travel, meals and entertainment	
2009 p	3.1
2008 r	3.5
2007 r	3.7
2006	3.3
Other purchased goods and services	
2009 p	13.4
2008 r	13.3
2007 r	10.6
2006	15.1
Other operating expenses	
2009 p	10.6
2008 r	10.5
2007 r	11.8
2006	14.8

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 541360 and 541370). See "Data sources, definitions and methodology" at the end of tables for definition of terms.

Table 3
Sales by type of client for the surveying and mapping services industry,¹ Canada, 2006 to 2009

	percent
Clients in Canada	
2009 p	94.0
2008 r	92.2
2007 r	94.4
2006	91.7
Individuals and households	
2009 p	8.8
2008 r	7.4
2007 r	7.7
2006	4.0
Governments, not-for-profit organizations and public institutions	
2009 p	7.3
2008 r	6.9
2007 r	6.3
2006	4.4
Business sector	
2009 p	77.9
2008 r	77.9
2007 r	80.4
2006	83.3
Clients outside Canada	
2009 p	5.9
2008 r	7.9
2007 r	5.5
2006	8.3

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 541360 and 541370). 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 surveying and mapping services industry,¹ 2008 to 2009

	2008	2009
	percent	
Geophysical surveying and mapping services	46.9	38.8
Geophysical services and geophysical borehole logging surveys	39.2	32.1
Geophysical data sales	7.8	6.7
Non-geophysical surveying and mapping services	48.5	55.9
Geospatial photo, image and data acquisition, processing and interpretation	5.6	6.0
Topographic, planimetric, hydrographic and bathymetric surveying and mapping services	7.6	10.1
Boundary, property line and cadastral surveying and mapping, subdivision layout and design and construction surveying	31.3	34.8
Geodetic surveying, ground control support, thematic and orthophoto mapping and aeronautical and nautical charting	4.0	5.0
Other goods and services	4.5	5.3
Total	100.0	100.0

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 541360 and 541370). See "Data sources, definitions and methodology" at the end of tables for definition of terms.

Data sources, definitions and methodology

Description

This annual sample survey collects data required to produce economic statistics for the Surveying and Mapping Services industry 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 the Surveying and Mapping Services industry (NAICS 541360 and 541370) according to the North American Industry Classification System (NAICS) during the reference year. This industry comprises establishments primarily engaged in gathering, interpreting and mapping geophysical data. These establishments often specialize in locating and measuring the extent of subsurface resources such as oil, gas and minerals. These establishments are also engaged in providing surveying and mapping services of the surface of the earth, including sea floor.

Industry structure

Under the North American Industrial Classification System (NAICS), the Surveying and Mapping Services industry consists of Geophysical Surveying and Mapping Services (541360) and Surveying and Mapping (except Geophysical) Services (541370).

Geophysical surveying and mapping services – 541360

This industry group comprises establishments primarily engaged in gathering, interpreting and mapping geophysical data. These establishments often specialize in locating and measuring the extent of subsurface resources, such as oil, gas and minerals, but they may also conduct surveys for engineering purposes. A variety of surveying techniques are used, including seismic, magnetic, gravity, electrical and electromagnetic, radioactive and remote sensing, depending on the purpose of the survey.

Surveying and mapping (except geophysical) services – 541370

This industry group comprises establishments primarily engaged in providing surveying and mapping services of the surface of the earth, including the sea floor. These services may include surveying and mapping of areas above or below the surface of the earth, such as the creation of view easements or segregating rights in parcels of land by creating underground utility easements. Examples of activities are: cadastral and topographic surveying and mapping services; control surveying services, such as geodesy and Global Positioning System (GPS) surveying; cartographic surveying services, including photogrammetric mapping; geographic information system (GIS) base mapping and quality control services; and geospatial mapping services.

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 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 2009 was 727 collection entities.

Definitions

Estimates for the most recent year are preliminary. Preliminary data are subject to revision.

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/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. Therefore the relative level of salaries, wages and benefits will be lower in industries where unincorporated businesses are significant contributors.

Quality evaluation

Prior to dissemination, 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, 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 86.9%. CVs were calculated for each estimate and are available upon request.

Related products

Selected CANSIM tables from Statistics Canada

360-0006	Surveying and mapping services, summary statistics, by North American Industry Classification System (NAICS), annual (75 series)
360-0016	Surveying and mapping services, operating expenses, by North American Industry Classification System (NAICS), Annual (21 series)
360-0017	Surveying and mapping services, sales by type of client based on the North American Industry Classification System (NAICS), annual (5 series)

Survey(s)

Definitions, data sources and methods: survey number 4715 - Annual Survey of Service Industries: Surveying and Mapping

Publications

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

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

Release date: February 2011

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

To access this product

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