

Surveying and mapping services, 2021

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Energy sector and housing market influenced surveying and mapping services in 2021

Surveying and mapping services in Canada have fully recovered from the COVID-19 pandemic, with a 14.8% increase in operating revenue in 2021, reaching \$2.5 billion. This recovery was supported by key factors, such as a turnaround in the energy sector and strong growth in the real estate market.

There are two categories of surveying and mapping services. The first of these categories is geophysical surveying and mapping services. Establishments in this category are primarily engaged in collecting, interpreting and mapping geophysical data, including locating and measuring the extent of subsoil resources, such as oil, gas and minerals. Capital expenditures for oil and gas extraction industries experienced a rebound, recovering to roughly 90% of their pre-pandemic levels by the end of 2021, which fuelled the recovery of the industry.

The second category is non-geophysical surveying and mapping services. Establishments in this category are primarily engaged in providing surveying and mapping services for the surface of the earth or sea floor. Non-geophysical surveying and mapping services in 2021 have benefitted from the substantial increase in real estate developments observed in nearly every area of the country.

Operating revenue grew for all provinces in 2021, though the revenue growth for Saskatchewan (+3.0%) was more moderate than that of the other provinces. While Alberta had the largest share of operating revenue (30.1%) of any province, its share has decreased by a little under 1 percentage point compared with 2020 (at which point Alberta's share was 31.0%). This result is in line with historical trends, as Alberta's share of the operating revenue of the surveying and mapping industry has been in continuous decline since 2013. At the same time, the share of operating revenue increased in Quebec (+2 percentage points) and British Columbia (+0.4 percentage point) in 2021 compared with 2020.

Surveying and mapping businesses continued to be impacted by the various waves of the pandemic, though less severely than in 2020. In 2021, a sizable number of businesses continued to report that they retrofitted their workspace because of the pandemic, expanded to a contactless business mode, or asked some or all employees to work from home.

Expenses for the industry grew at a slower rate than operating revenue (11.9%), resulting in a profit margin of 14.1% in 2021. The largest expense item—salaries, wages, commissions and benefits—accounted for just over half of all operating expenses (51.7%), totaling \$1.1 billion in 2021.

Signals for surveying and mapping services in 2022

Preliminary economic indicators for 2022 suggest a mixed performance for Canada's surveying and mapping services industry. Business conditions in the energy sector have continued to improve, with capital expenditures in the oil and gas sector increasing by nearly one-third in the first six months of 2022. However, with tightening monetary policy, the residential real estate market is cooling and likely moderating demand for non-geophysical surveying and mapping services. A complete and detailed financial picture of the surveying and mapping services industry for 2022 will be provided when survey data are collected next year.



Note to readers

Data for 2020 have been revised.

Information on capital expenditures in the oil and gas industry was obtained from the Capital expenditures, oil and gas extraction industries, Canada (x 1,000,000), Table [25-10-0054-01](#).

These and other data related to business and consumer services can be found at the [Business and consumer services and culture statistics](#) portal.

Available tables: [21-10-0159-01](#), [21-10-0161-01](#), [21-10-0162-01](#) and [21-10-0211-01](#).

Definitions, data sources and methods: survey number [4715](#).

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