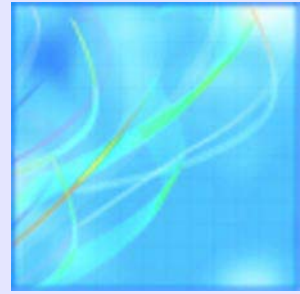


Aviation

Air Fares, Canadian Air Carriers, Level I

2012



Highlights

- In 2012, the air fares (domestic and international combined) averaged \$248.60, down 0.4% from \$249.70 in 2011. This decrease was mainly a result of year-over-year declines in the second and fourth quarters. The average domestic air fare paid by passengers was \$192.20 in 2012, up 0.8% from \$190.70 the previous year. The average international air fare dropped slightly (-1.6%) from \$326.80 in 2011 to \$321.50 in 2012.
- In 2012, 96.7% of passengers on domestic and international scheduled services flew on discount fares, down 0.1 percentage points from 96.8% in 2011. On domestic scheduled services, 95.9% of passengers travelled on discount fares, down 0.1 percentage points from 96.0% the previous year. On international scheduled services, the proportion of passengers flying on discount fares fell 0.2 percentage points to 97.7%.
- When the distribution was expressed in terms of passenger-kilometres, the proportion of domestic discount travel remained unchanged from 2011 at 95.8% and the proportion of international discount travel decreased 0.1 percentage points from the previous year to 98.5% in 2012.
- In 2012, average domestic air fares rose across 7 of the 10 selected Canadian cities of enplanement compared to 2011. Toronto remained the city with the highest average domestic air fare (\$214.90), while Edmonton once again posted the lowest average domestic air fare (\$177.80). During this period, year-over-year increases ranged from 0.3% in Vancouver to 6.3% in Saskatoon. Montréal (-2.9%) and Ottawa (-1.3%) were the only cities of enplanement to report a decrease, while in Toronto, the average domestic air fare remained unchanged. Toronto and Vancouver posted average domestic air fares above the national average (\$192.20); in Ottawa, the average fare was on par with the national average.

Analysis

Average air fares¹

The airline industry continued to see increased demand for air travel in 2012. During this period, the average air fare (all types, all sectors, on a coupon origin-destination basis) paid by passengers was \$248.60, down 0.4% from \$249.70 in 2011, ending the upward trend experienced between 2009 and 2011. The level reached in 2012 was mainly a result of year-over-year declines in the second and fourth quarters.

The average domestic air fare (all types) paid by passengers was \$192.20 in 2012, up 0.8% from \$190.70 in 2011. This was the third consecutive annual increase after a strong decline (-11.9%) in 2009.

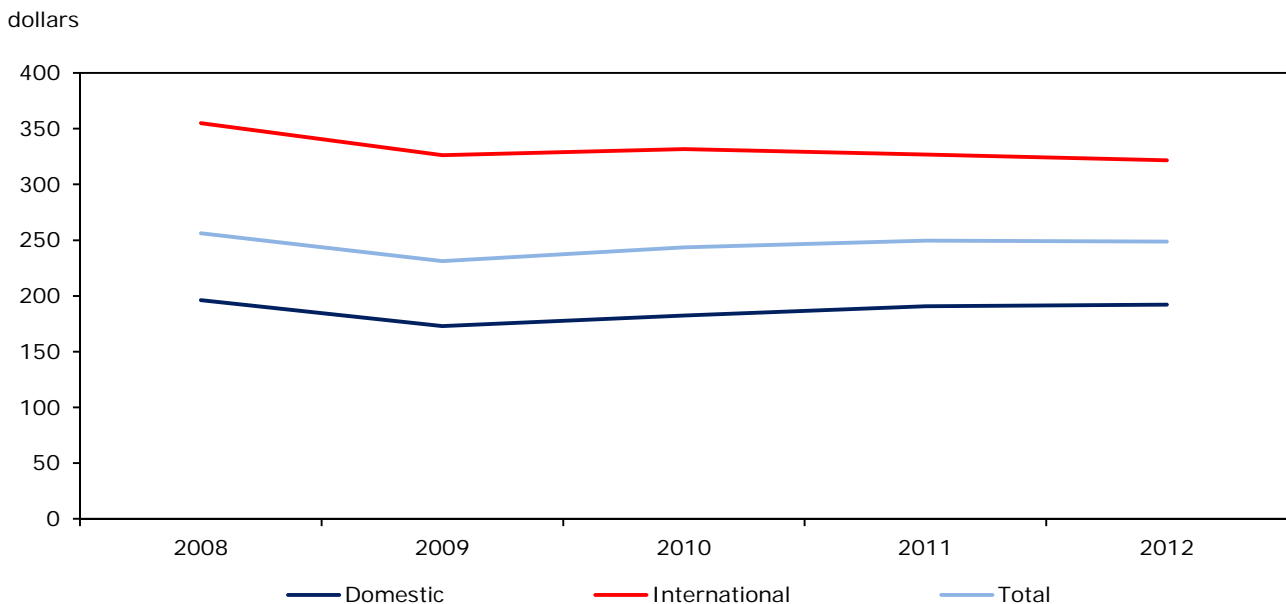
The average international air fare (all types) was \$321.50 in 2012, down 1.6% from \$326.80 in 2011.

As can be seen in Chart 1 below, the average domestic air fare reached in 2012 was still below the pre-downturn levels. Some factors that may explain the situation are the aggressive and competitive nature of the airline industry—substantial price competition from Canadian low-cost carriers translated into limited ability for major airlines to increase fares; the growth and competitiveness of Internet distribution channels have pushed air carriers to more aggressively price their products to the cost-conscious travellers.

In the international sector, the average air fare fell for the second consecutive year, and remained below the pre-downturn levels. The increased and intense competition amongst Canadian and foreign carriers in the international markets, the unfavourable economic conditions in the United States and in the European markets are additional factors that may have impacted the ability of airlines to raise fares.

Chart 1

Average air fares — All fares, by sector, 2008 to 2012



1. Average air fares are calculated for each flight stage. When the passenger boards the aircraft at one airport and departs the aircraft at another airport, this is considered a flight stage. These fares do not include GST, air transportation taxes or user fees such as airport fees or fuel surcharges.

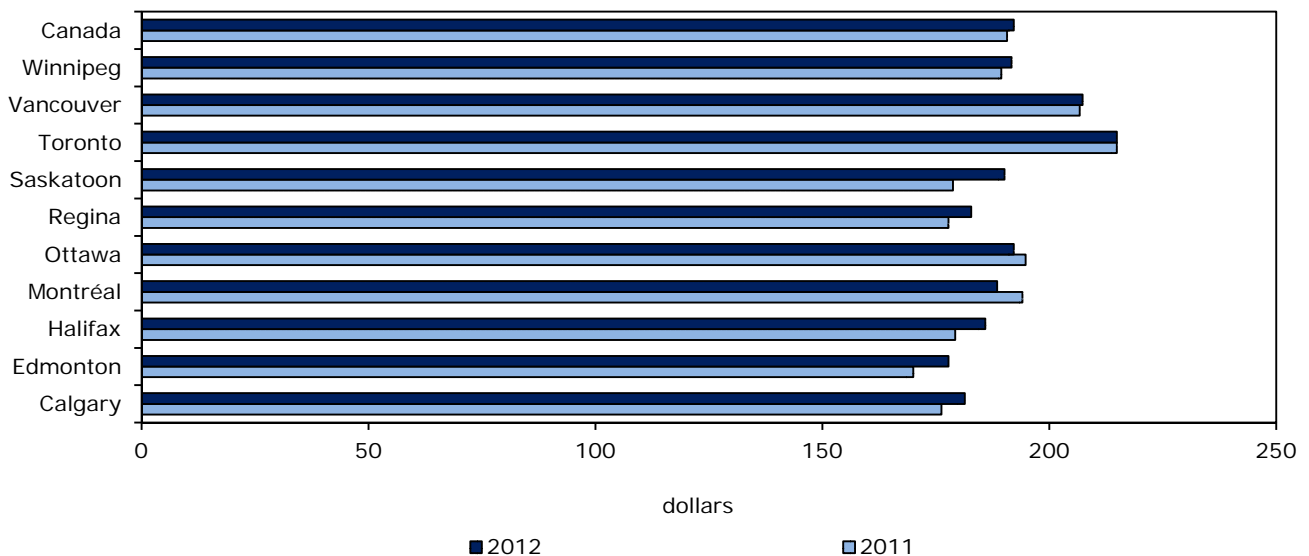
Average domestic air fares at the city level

In 2012, average domestic air fares increased across 7 of the 10 selected Canadian cities of enplanement compared to 2011. During this period, year-over-year increases ranged from 0.3% in Vancouver to 6.3% in Saskatoon. Toronto remained the city with the highest average domestic air fare (\$214.90), followed by Vancouver (\$207.30), Ottawa (\$192.20) and Winnipeg (\$191.70), while Edmonton once again posted the lowest average domestic air fare (\$177.80). Higher fares in Toronto can be partly explained by the fact that more long-haul flights—which are more expensive—leave from Toronto's Pearson International Airport.

As shown in Chart 2 below, Toronto was the only selected eastern Canadian city of enplanement to register an average domestic air fare above the national level (\$192.20) in 2012. During the same period, Vancouver was the only selected western Canadian city of enplanement to register an average fare above the national level.

Chart 2

Average domestic fares for selected eastern and western Canadian cities of enplanement, 2011 and 2012



For historical annual data at the city level, please refer to the CANSIM table 401-0004.

The air fare index is no longer included in this publication as of reference year 2012. However, this data series can be found in CANSIM table 329-0078.

Notes

The estimates are derived from a sample of flight coupons collected as part of the Fare Basis Survey. The estimates relate to the operations of major Canadian air carriers. For 2012, the air carriers included are the Canadian Level I carriers (Air Canada, Jazz, Air Canada's Canadian regional code-share partners, Air Transat and WestJet). Imputation has been performed for incomplete and missing data.

For purposes of statistical tabulations, fare codes reported by the air carriers are grouped by general fare type. These fare types are defined as follows:

- First class: The transportation of a passenger or passengers for whom premium-quality services (e.g. larger seats, complimentary bar) are provided.
- Business class: A fare level which is less expensive than first class and more expensive than the basic fare level. It includes different amenities (e.g. larger seats, advanced seat assignment).
- Economy: A basic fare level which is less expensive than first class but does not include the amenities (e.g. larger seats, complimentary bar) of the first class fare.
- Discount: A reduced fare usually subject to one or more travel restrictions, the price of which is usually calculated as a percentage reduction from the normal full fare. It includes various discount fares such as charter class, seat sales, advance purchase excursion and group.
- Other: Represents industry and agency discount fares, military as well as unknown fare codes.

The average fare is obtained by dividing the carriers' revenue by the passenger volume, as measured by coupon origin and destination.

The average domestic air fares are the average for all coupons originating in that city, for all domestic destinations. The level of average fares can be affected by changes in travel patterns, as well as prices.

Average air fares do not include GST, air transportation taxes or user fees such as airport fees or fuel surcharges.

Additional information on Fare Basis statistics can be obtained directly from the Aviation Statistics Centre. Tables are available in print form or in electronic format. For further information, please contact the Aviation Statistics Centre (telephone: 1-866-500-8400; Internet: aviationstatistics@statcan.gc.ca).

Statistical Tables

Table 1

Average fares, by sector and fare type group — Canadian air carriers, Level I¹ – Scheduled services

	Fare type group				
	Total	Business class	Economy	Discounted	Other
dollars					
Domestic					
2008	196.30	1,762.80	297.10	192.20	F
2009	173.00	1,896.00	254.90	169.90	24.10 ^E
2010	182.50	2,005.70	258.90	179.20	F
2011	190.70	2,316.80	254.00	187.90	F
2012 ^P	192.20	2,474.70 ^E	283.80	188.10	F
Short-haul					
2008	142.40	793.30 ^E	221.80	139.40	F
2009	132.30	928.80 ^E	201.40	129.80	22.50 ^E
2010	140.20	896.40 ^E	198.50	137.90	F
2011	146.10	1,115.20 ^E	192.70	144.20	F
2012 ^P	145.40	1,481.70 ^E	216.10	142.50	F
Long-haul					
2008	243.70	1,960.40	354.60	238.90	F
2009	x	x	x	x	x
2010	218.30	2,129.80	305.70	214.20	F
2011	229.30	2,415.00	303.00	225.70	F
2012 ^P	233.00	2,593.80 ^E	338.10	228.00	F
International					
2008	355.00	3,448.10	370.90	352.90	F
2009	326.30	3,528.00	379.40	324.90	F
2010	331.80	3,505.40	376.60	328.20	F
2011	326.80	3,969.00	380.70	323.90	F
2012 ^P	321.50	3,804.30	360.30	319.10	F
Domestic and international					
2008	256.10	3,153.10	309.00	253.70	F
2009	231.20	3,160.80	278.40	229.70	F
2010	243.50	3,329.20	288.80	240.80	F
2011	249.70	3,597.80	289.80	247.50	F
2012 ^P	248.60	3,480.30	306.60	245.90	F

1. From 2008 to 2012, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada, Jazz and regional code-share partners), Air Transat and WestJet.

Note(s): Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed.

All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F.

Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Table 2
Distribution of passengers, by sector and fare type group — Canadian air carriers, Level I¹ – Scheduled services

	Fare type group			
	Business class	Economy	Discounted	Other
	percent			
Domestic				
2008	0	3.9	96.0	0.1
2009	0	4.0	95.7	0.3
2010	0	4.0	95.9	0 ^E
2011	0	4.0	96.0	0 ^E
2012 ^P	0	4.1	95.9	0 ^E
Short-haul				
2008	0 ^E	3.6	96.3	0.1 ^E
2009	0 ^E	3.7	96.1	0.2 ^E
2010	0 ^E	3.8	96.1	0 ^E
2011	0 ^E	3.8	96.2	F
2012 ^P	0 ^E	3.9	96.1	0 ^E
Long-haul				
2008	0	4.2	95.6	0.2 ^E
2009	x	x	x	x
2010	0	4.2	95.8	0 ^E
2011	0	4.1	95.8	0 ^E
2012 ^P	0	4.2	95.8	F
International				
2008	0.1	1.3	98.5	0.2
2009	0	1.5	98.1	0.4
2010	0.1	2.0	97.9	0 ^E
2011	0	2.1	97.9	0 ^E
2012 ^P	0	2.2	97.7	0 ^E
Domestic and international				
2008	0	2.9	96.9	0.2
2009	0	3.0	96.6	0.3
2010	0	3.2	96.7	0 ^E
2011	0	3.2	96.8	0 ^E
2012 ^P	0	3.3	96.7	0 ^E

1. From 2008 to 2012, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada, Jazz and regional code-share partners), Air Transat and WestJet.

Note(s): Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed.

All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F.

Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Table 3
Distribution of passenger-kilometres, by sector and fare type group — Canadian air carriers, Level I¹ – Scheduled services

	Fare type group			
	Business class	Economy	Discounted	Other
	percent			
Domestic				
2008	0	4.1	95.7	0.2 ^E
2009	0	4.1	95.5	0.3
2010	0 ^E	4.2	95.8	0 ^E
2011	0 ^E	4.1	95.8	0 ^E
2012 ^P	0 ^E	4.2	95.8	F
Short-haul				
2008	0 ^E	4.2	95.8	0.1 ^E
2009	0 ^E	4.3	95.6	0.2 ^E
2010	0 ^E	4.4	95.6	0 ^E
2011	0 ^E	4.3	95.7	F
2012 ^P	0 ^E	4.4	95.6	0 ^E
Long-haul				
2008	0	4.1	95.7	0.2 ^E
2009	x	x	x	x
2010	0 ^E	4.1	95.8	0 ^E
2011	0 ^E	4.1	95.9	0 ^E
2012 ^P	0 ^E	4.2	95.8	F
International				
2008	0.1	0.8	98.8	0.2
2009	0.1	1.0	98.5	0.5
2010	0.1	1.3	98.5	0.1 ^E
2011	0.1	1.4	98.6	0 ^E
2012 ^P	0	1.5	98.5	F
Domestic and international				
2008	0.1	2.0	97.7	0.2
2009	0	2.1	97.4	0.4
2010	0.1	2.3	97.6	0 ^E
2011	0	2.3	97.7	0 ^E
2012 ^P	0	2.3	97.6	0 ^E

1. From 2008 to 2012, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada, Jazz and regional code-share partners), Air Transat and WestJet.

Note(s): Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed.

All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F.

Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Table 4
Average domestic fares for selected cities of enplanement — Canadian air carriers, Level I¹ – Scheduled services

	2011	2012 ^P
	dollars	
Calgary	176.20	181.40
Edmonton	170.00	177.80
Halifax	179.30	185.90
Montréal	194.10	188.50
Ottawa	194.80	192.20
Regina	177.80	182.80
Saskatoon	178.80	190.10
Toronto	214.90	214.90
Vancouver	206.70	207.30
Winnipeg	189.40	191.70

1. For 2011 and 2012, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada, Jazz and regional code-share partners), Air Transat and WestJet.

Note(s): All estimates shown above have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Table 5
Average fares, by sector and fare type group — Canadian air carriers, Level I¹ – Scheduled services (quarterly)

	Fare type group				
	Total	Business class	Economy	Discounted	Other
	dollars				
Domestic					
2011					
First quarter	188.30	2,222.00 ^E	238.60	186.00	F
Second quarter	195.80	2,183.40 ^E	264.60	192.60	F
Third quarter	184.90	2,398.60 ^E	240.90	182.20	F
Fourth quarter	194.70	F	272.30	191.30	F
2012 P					
First quarter	190.00	2,382.90 ^E	266.00	186.70	F
Second quarter	191.60	2,431.20 ^E	277.60	187.60	F
Third quarter	192.10	2,605.40 ^E	293.20	187.50	F
Fourth quarter	195.10	F	294.60	190.70	F
Short-haul					
2011					
First quarter	147.20	F	186.60	145.50	F
Second quarter	150.80	F	199.50	148.80	F
Third quarter	138.40	F	175.60	136.80	F
Fourth quarter	148.50	F	209.20	146.20	F
2012 P					
First quarter	145.00	F	207.00	142.50	F
Second quarter	147.20	F	211.20	144.50	F
Third quarter	140.80	F	217.10	137.60	F
Fourth quarter	148.70	F	228.10	145.40	F
Long-haul					
2011					
First quarter	229.80	2,336.20 ^E	291.70	226.90	F
Second quarter	233.90	2,255.70 ^E	315.60	229.90	F
Third quarter	218.00	2,477.70 ^E	282.40	214.80	F
Fourth quarter	239.10	F	327.20	235.00	F
2012 P					
First quarter	235.30	2,476.80 ^E	323.80	231.20	F
Second quarter	229.50	2,476.10 ^E	328.80	224.50	F
Third quarter	229.00	2,775.10 ^E	342.70	223.60	F
Fourth quarter	240.30	F	354.40	234.90	F
International					
2011					
First quarter	303.80	3,711.40 ^E	400.20	300.00	F
Second quarter	318.30	4,018.50 ^E	365.80	315.70	F
Third quarter	358.90	4,186.90 ^E	349.20	356.80	F
Fourth quarter	326.40	3,882.40 ^E	389.80	323.10	F
2012 P					
First quarter	316.90	3,543.40 ^E	418.30	312.80	F
Second quarter	315.70	3,852.00 ^E	343.70	313.40	F
Third quarter	343.30	4,012.20 ^E	307.20	342.70	F
Fourth quarter	307.10	3,900.00 ^E	342.50	304.60	F
Domestic and international					
2011					
First quarter	244.90	3,375.40 ^E	300.60	242.30	F
Second quarter	248.60	3,587.00 ^E	291.20	246.30	F
Third quarter	255.30	3,795.30 ^E	261.10	254.10	F
Fourth quarter	249.10	3,570.00 ^E	308.30	246.20	F

See notes at the end of the table.

Table 5 – continued

Average fares, by sector and fare type group — Canadian air carriers, Level I¹ – Scheduled services (quarterly)

	Fare type group				
	Total	Business class	Economy	Discounted	Other
dollars					
2012 p					
First quarter	251.80	3,255.00 ^E	325.30	248.50	F
Second quarter	245.30	3,500.60 ^E	295.60	242.70	F
Third quarter	254.80	3,707.70 ^E	296.20	252.90	F
Fourth quarter	241.20	3,551.80 ^E	310.20	237.90	F
percent change from 2011 to 2012					
Domestic					
First quarter	0.9	7.2	11.5	0.4	F
Second quarter	-2.1	11.3	4.9	-2.6	F
Third quarter	3.9	8.6	21.7	2.9	F
Fourth quarter	0.2	F	8.2	-0.3	F
Short-haul					
First quarter	-1.5	F	10.9	-2.1	F
Second quarter	-2.4	F	5.9	-2.9	F
Third quarter	1.7	F	23.6	0.6	F
Fourth quarter	0.1	F	9.0	-0.5	F
Long-haul					
First quarter	2.4	6.0	11.0	1.9	F
Second quarter	-1.9	9.8	4.2	-2.3	F
Third quarter	5.0	12.0	21.4	4.1	F
Fourth quarter	0.5	F	8.3	0.0	F
International					
First quarter	4.3	-4.5	4.5	4.3	F
Second quarter	-0.8	-4.1	-6.0	-0.7	F
Third quarter	-4.3	-4.2	-12.0	-4.0	F
Fourth quarter	-5.9	0.5	-12.1	-5.7	F
Domestic and international					
First quarter	2.8	-3.6	8.2	2.6	F
Second quarter	-1.3	-2.4	1.5	-1.5	F
Third quarter	-0.2	-2.3	13.4	-0.5	F
Fourth quarter	-3.2	-0.5	0.6	-3.4	F

1. For 2011 and 2012, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada, Jazz and regional code-share partners), Air Transat and WestJet.

Note(s): Due to the confidentiality or the unreliability of data, the results for the fare type group "first class" cannot be disclosed.

All estimates shown above (except those marked with the codes E and F) have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. An E indicates a coefficient between 10% and 25%. The estimates with a coefficient of variation greater than 25% cannot be released and are shown with the code F.

Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Table 6
Discount fare traffic, by sector — Canadian air carriers, Level I¹ – Scheduled services (quarterly)

	Passengers		Passenger-kilometres	
	2011	2012 ^P	2011	2012 ^P
	percent			
Domestic				
First quarter	96.1	96.1	96.1	96.1
Second quarter	95.9	95.8	95.8	95.7
Third quarter	95.9	95.8	95.7	95.6
Fourth quarter	96.1	95.9	95.9	95.8
Short-haul				
First quarter	96.1	96.2	95.6	95.7
Second quarter	96.1	96.1	95.6	95.6
Third quarter	96.2	96.0	95.7	95.5
Fourth quarter	96.3	96.1	95.8	95.6
Long-haul				
First quarter	96.1	96.1	96.2	96.1
Second quarter	95.8	95.6	95.8	95.7
Third quarter	95.7	95.6	95.7	95.6
Fourth quarter	95.9	95.8	96.0	95.8
International				
First quarter	97.4	97.4	98.0	98.0
Second quarter	98.0	97.9	98.7	98.7
Third quarter	98.6	98.4	99.1	99.1
Fourth quarter	97.5	97.2	98.2	98.0
Domestic and international				
First quarter	96.7	96.7	97.5	97.4
Second quarter	96.8	96.7	97.8	97.7
Third quarter	97.0	96.9	98.0	98.0
Fourth quarter	96.7	96.4	97.5	97.3

1. For 2011 and 2012, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada, Jazz and regional code-share partners), Air Transat and WestJet.

Note(s): All estimates shown above have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Table 7
Average domestic fares for selected cities of enplanement — Canadian air carriers, Level I¹ – Scheduled services (quarterly)

	Calgary	Edmonton	Halifax	Montréal	Ottawa
dollars					
2011					
First quarter	169.10	164.40	179.50	198.60	198.20
Second quarter	178.50	174.00	179.70	202.10	202.10
Third quarter	173.40	166.10	173.50	186.10	184.40
Fourth quarter	183.50	175.20	186.20	191.10	195.90
2012 P					
First quarter	174.10	170.70	186.60	189.40	190.90
Second quarter	178.40	173.50	184.00	192.50	201.40
Third quarter	184.80	180.20	185.40	185.60	184.80
Fourth quarter	187.10	185.70	187.90	186.70	191.90
percent change from 2011 to 2012					
First quarter	3.0	3.8	4.0	-4.6	-3.7
Second quarter	-0.1	-0.3	2.4	-4.8	-0.3
Third quarter	6.6	8.5	6.9	-0.3	0.2
Fourth quarter	2.0	6.0	0.9	-2.3	-2.0
	Regina	Saskatoon	Toronto	Vancouver	Winnipeg
dollars					
2011					
First quarter	170.40	170.70	218.70	200.50	187.60
Second quarter	183.40	179.80	221.60	209.20	193.80
Third quarter	173.30	178.10	204.60	204.40	180.20
Fourth quarter	183.50	185.90	217.50	212.30	197.10
2012 P					
First quarter	174.70	185.50	215.50	208.30	189.60
Second quarter	180.50	190.60	213.90	204.70	189.40
Third quarter	184.70	192.10	212.50	210.30	189.50
Fourth quarter	190.10	191.80	218.50	205.50	199.00
percent change from 2011 to 2012					
First quarter	2.5	8.7	-1.5	3.9	1.1
Second quarter	-1.6	6.0	-3.5	-2.2	-2.3
Third quarter	6.6	7.9	3.9	2.9	5.2
Fourth quarter	3.6	3.2	0.5	-3.2	1.0

1. For 2011 and 2012, the air carriers included are the Canadian Level I carriers, which are comprised of the Air Canada Family (Air Canada, Jazz and regional code-share partners), Air Transat and WestJet.

Note(s): All estimates shown above have a coefficient of variation of less than 10% and can be considered reliable from a sampling point of view. Estimates are subject to periodic revisions to reflect carrier updates and further refinement of the fare code assignment system.

Release date: March 2014

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
*	significantly different from reference category ($p < 0.05$)

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Note of appreciation

Canada owes the success of its statistical system to a long-standing partnership between Statistics Canada, the citizens of Canada, its businesses, governments and other institutions. Accurate and timely statistical information could not be produced without their continued cooperation and goodwill.