

## Service bulletin

# Consulting Services

2009



### Highlights

- Operating revenue in the consulting services industry dipped to \$12.7 billion in 2009 from \$12.8 billion in 2008. This year-over-year decline of -0.8% follows four years of annual growth above 8 %.
- Consulting services in this survey comprises firms that are primarily engaged in providing expert advice and assistance to other organizations on management, environmental, and other scientific and technical issues. Management consulting services accounted for 69.8% share of industry revenue, while environmental with other scientific and technical consulting services made up the remaining 30.2%.
- In 2009, the operating revenue for management consulting services grew less than 1% over 2008. Environmental and other scientific and technical consulting services saw year-over-year revenue fall by -4.2%.
- While total operating revenues decreased, so too did total operating expenses, down 0.6% to \$10.1 billion in 2009. The largest expense in this knowledge-intensive industry was labour costs, accounting for 63.7% of total operating expense. Labour costs include salaries, wages and benefits, subcontract expense, professional business service fees and commissions paid to non employees.
- The operating profit margin of firms in consulting services stood at 20.6%, down slightly from 20.8% in 2008.
- Operating revenue in management consulting services decreased in Ontario (-1.1%), Alberta (-0.4%), and Quebec (-2.5%), while British Columbia registered modest growth (+1.7%) from 2008 to 2009.

## Statistical tables

Table 1

Summary statistics for management consulting services (NAICS 54161), by province and territory, 2007 to 2009

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
<b>2009<sup>p</sup></b>				
Newfoundland and Labrador	25.8	17.2	7.5	33.3
Prince Edward Island	x	x	x	x
Nova Scotia	101.5	72.8	37.0	28.3
New Brunswick	46.7	36.5	16.9	21.8
Quebec	1,501.7	1,106.2	502.3	26.3
Ontario	4,455.0	3,627.8	1,710.3	18.6
Manitoba	132.1	104.3	49.1	21.0
Saskatchewan	104.2	81.4	42.2	21.9
Alberta	1,408.7	1,027.7	429.4	27.0
British Columbia	1,033.1	794.0	357.1	23.1
Territories <sup>1</sup>	x	x	x	x
<b>Canada</b>	<b>8,843.0</b>	<b>6,894.5</b>	<b>3,161.0</b>	<b>22.0</b>
<b>2008<sup>r</sup></b>				
Newfoundland and Labrador	24.8	16.3	7.3	34.3
Prince Edward Island	x	x	x	x
Nova Scotia	97.7	73.3	35.9	25.0
New Brunswick	45.7	36.1	14.4	20.9
Quebec	1,488.2	1,116.4	478.4	25.0
Ontario	4,368.0	3,501.0	1,570.5	19.8
Manitoba	143.3	123.6	51.2	13.8
Saskatchewan	108.4	91.5	45.4	15.7
Alberta	1,443.5	1,061.2	464.4	26.5
British Columbia	1,022.2	837.2	367.1	18.1
Territories <sup>1</sup>	x	x	x	x
<b>Canada</b>	<b>8,780.9</b>	<b>6,886.7</b>	<b>3,049.0</b>	<b>21.6</b>
<b>2007<sup>r</sup></b>				
Newfoundland and Labrador	24.5	16.2	6.7	33.7
Prince Edward Island	x	x	x	x
Nova Scotia	98.1	69.2	35.0	29.4
New Brunswick	39.9	29.5	11.6	26.1
Quebec	1,409.5	1,054.0	479.7	25.2
Ontario	4,044.4	3,302.4	1,415.1	18.3
Manitoba	143.1	111.9	52.2	21.8
Saskatchewan	123.3	102.1	46.7	17.2
Alberta	1,229.7	959.0	378.0	22.0
British Columbia	987.5	810.7	380.2	17.9
Territories <sup>1</sup>	x	x	x	x
<b>Canada</b>	<b>8,131.6</b>	<b>6,478.6</b>	<b>2,815.1</b>	<b>20.3</b>

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

**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.

**Table 2**  
**Expenditures as a percentage of total operating expenses for consulting services, by province and territory, 2007 to 2009**

	Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Manitoba	Saskatchewan	Alberta	British Columbia	Territories <sup>1</sup>	Canada
	percent											
<b>Salaries, wages and benefits</b>												
2009 P	49.9	x	50.3	45.6	46.4	49.6	48.6	49.8	41.1	46.6	x	<b>46.8</b>
2008 r	46.5	x	60.0	45.2	44.8	47.3	42.6	46.9	43.4	45.7	x	<b>46.0</b>
2007 r	47.1	x	50.4	49.0	48.0	43.8	48.1	43.7	40.5	50.8	x	<b>44.7</b>
<b>Other labour costs</b>												
2009 P	18.2	x	19.5	17.2	17.8	15.1	21.5	17.8	20.0	16.4	x	<b>16.9</b>
2008 r	21.7	x	9.7	20.9	19.0	18.9	28.2	17.1	18.4	18.0	x	<b>18.8</b>
2007 r	21.5	x	17.2	21.8	18.3	17.6	21.4	24.3	25.2	15.3	x	<b>19.6</b>
<b>Rental, leasing, utilities and telecommunications</b>												
2009 P	5.8	x	6.6	5.9	6.1	5.4	6.6	6.0	5.1	5.2	x	<b>5.4</b>
2008 r	5.9	x	4.3	5.2	6.0	4.8	5.0	5.0	5.1	5.7	x	<b>5.2</b>
2007 r	4.9	x	4.7	5.8	6.4	5.1	5.4	4.2	5.0	5.6	x	<b>5.3</b>
<b>Repair and maintenance expenses</b>												
2009 P	2.9	x	1.8	3.9	2.1	3.7	2.4	4.8	4.1	3.2	x	<b>3.5</b>
2008 r	3.1	x	1.6	5.5	2.8	3.1	4.0	4.6	4.2	3.3	x	<b>3.4</b>
2007 r	2.8	x	5.5	3.9	2.7	3.4	3.6	4.1	4.9	3.9	x	<b>3.8</b>
<b>Depreciation charges of tangible and intangible assets</b>												
2009 P	2.1	x	2.7	3.2	2.9	2.1	2.3	3.6	3.0	2.3	x	<b>2.5</b>
2008 r	2.3	x	2.1	3.4	3.8	2.0	2.4	3.0	2.8	2.0	x	<b>2.5</b>
2007 r	3.0	x	2.4	2.6	2.5	2.0	2.6	2.8	3.2	2.0	x	<b>2.4</b>
<b>Advertising, marketing, promotions, travel, meals and entertainment</b>												
2009 P	6.0	x	6.5	7.5	6.8	5.2	5.9	4.3	5.0	6.3	x	<b>5.6</b>
2008 r	6.1	x	6.3	7.2	6.8	5.2	6.1	5.3	6.0	5.5	x	<b>5.7</b>
2007 r	5.5	x	5.8	6.9	7.6	4.8	7.2	4.0	4.9	6.8	x	<b>5.5</b>
<b>Other purchased goods and services</b>												
2009 P	11.8	x	8.8	12.3	12.3	14.6	7.0	5.3	14.9	14.2	x	<b>13.9</b>
2008 r	10.5	x	11.5	9.5	9.6	13.5	7.6	9.0	14.3	14.3	x	<b>12.9</b>
2007 r	11.9	x	10.0	7.3	8.7	17.4	8.5	11.6	12.3	11.8	x	<b>13.8</b>
<b>Other operating expenses</b>												
2009 P	3.3	x	4.0	4.4	5.7	4.7	5.7	8.4	6.5	5.9	x	<b>5.5</b>
2008 r	3.8	x	4.5	3.0	7.3	5.2	4.0	9.0	5.8	5.6	x	<b>5.8</b>
2007 r	3.2	x	4.0	2.7	5.7	5.2	3.2	5.2	4.0	3.9	x	<b>4.7</b>

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

**Note(s):** According to the North American Industry Classification System (NAICS 5416). See "Data sources, definitions and methodology" at the end of tables for definition of terms. 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.

**Table 3**  
**Sales by type of client for consulting services, by province and territory, 2007 to 2009**

	Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Manitoba	Saskatchewan	Alberta	British Columbia	Territories <sup>1</sup>	Canada
	percent											
<b>Clients in Canada</b>												
2009 P	96.9	x	90.8	94.5	93.3	91.2	97.3	98.0	97.5	89.4	x	92.9
2008 r	95.8	x	90.9	96.1	91.3	89.3	94.9	98.2	95.4	88.7	x	91.2
2007 r	96.6	x	93.3	97.9	94.3	89.6	95.5	96.9	96.4	88.9	x	92.0
Individuals and households												
2009 P	2.3	x	1.8	6.4	1.8	2.0	3.0	0.8	1.6	3.2	x	2.0
2008 r	0.8	x	2.5	2.0	2.9	2.3	2.4	1.6	2.5	1.4	x	2.3
2007 r	1.6	x	1.0	4.0	3.9	1.2	4.8	3.7	0.8	1.3	x	1.6
Governments, not-for-profit organizations and public institutions												
2009 P	22.6	x	22.5	27.2	17.6	19.9	22.3	15.7	12.3	17.9	x	17.8
2008 r	20.2	x	21.4	26.5	19.5	20.4	19.6	14.2	10.2	16.8	x	17.6
2007 r	16.6	x	21.5	23.6	14.9	16.2	23.1	12.0	11.5	19.8	x	15.7
Business sector												
2009 P	72.0	x	66.6	60.9	73.9	69.3	72.0	81.5	83.6	68.4	x	73.1
2008 r	74.8	x	67.1	67.7	68.9	66.7	72.9	82.4	82.7	70.5	x	71.3
2007 r	78.4	x	70.8	70.3	75.6	72.2	67.7	81.2	84.0	67.8	x	74.7
<b>Clients outside Canada</b>												
2009 P	3.1	x	9.2	5.5	6.7	8.8	2.7	2.0	2.5	10.6	x	7.1
2008 r	4.2	x	9.1	3.9	8.7	10.7	5.1	1.8	4.6	11.3	x	8.8
2007 r	3.4	x	6.7	2.1	5.7	10.4	4.5	3.1	3.6	11.1	x	7.8

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

**Note(s):** According to the North American Industry Classification System (NAICS 5416). See "Data sources, definitions and methodology" at the end of tables for definition of terms. 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.

**Table 4**  
**Sales by type of goods and services for consulting services, by province and territory, 2007 to 2009**

	Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Manitoba	Saskatchewan	Alberta	British Columbia	Territories <sup>1</sup>	Canada
	percent											
<b>Management consulting Services</b>												
2009 P	37.1	x	40.5	40.2	52.5	58.8	56.3	50.4	44.6	54.6	x	53.5
2008 r	34.9	x	37.6	40.6	52.1	55.3	57.5	53.3	41.5	57.1	x	51.5
2007 r	41.9	x	39.4	38.8	51.1	58.7	55.7	54.1	39.1	53.1	x	52.0
<b>Human resources management consulting services</b>												
2009 P	6.4	x	14.4	11.0	26.0	12.8	20.7	5.8	4.4	9.7	x	12.5
2008 r	7.5	x	21.1	7.7	26.4	15.9	23.1	6.7	7.7	9.8	x	14.9
2007 r	7.7	x	19.1	10.5	28.4	15.9	18.3	8.1	8.3	12.3	x	15.6
<b>Environmental consulting services</b>												
2009 P	34.3	x	21.5	26.1	5.0	8.5	9.3	22.0	16.7	18.1	x	11.7
2008 r	28.0	x	20.2	38.3	4.6	8.8	7.4	13.9	18.3	17.3	x	11.9
2007 r	35.7	x	21.9	34.3	4.8	6.3	7.7	7.6	17.6	19.2	x	10.8
<b>Other scientific and technical consulting services</b>												
2009 P	20.1	x	21.7	20.8	12.1	16.0	11.1	17.8	28.9	14.1	x	18.1
2008 r	26.5	x	19.7	11.6	12.4	17.0	10.6	24.4	28.4	13.4	x	18.4
2007 r	13.6	x	16.9	15.5	13.3	17.6	15.5	23.0	32.5	14.0	x	19.7
<b>Other sales of goods and services</b>												
2009 P	2.0	x	1.9	1.9	4.4	3.9	2.7	4.0	5.3	3.4	x	4.1
2008 r	3.1	x	1.3	1.8	4.5	2.9	1.3	1.7	4.0	2.5	x	3.3
2007 r	1.2	x	2.7	1.0	2.3	1.4	2.8	7.3	2.5	1.4	x	1.9

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

**Note(s):** According to the North American Industry Classification System (NAICS 5416). See "Data sources, definitions and methodology" at the end of tables for definition of terms. 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.

**Table 5**  
**Summary statistics for consulting services, Canada, 2007 to 2009**

	Operating revenue	Operating expenses	Salaries, wages and benefits	Operating profit margin
	millions of dollars			percent
<b>2009<sup>p</sup></b>				
Management consulting services	8,843.0	6,894.5	3,161.0	22.0
Environmental and other scientific and technical consulting services	3,833.0	3,168.3	1,326.8	17.3
Environmental consulting	1,522.6	1,362.2	599.9	10.5
Other scientific and technical consulting services	2,310.4	1,806.1	726.9	21.8
<b>Consulting services</b>	<b>12,676.0</b>	<b>10,062.7</b>	<b>4,487.8</b>	<b>20.6</b>
<b>2008<sup>r</sup></b>				
Management consulting services	8,780.9	6,886.7	3,049.0	21.6
Environmental and other scientific and technical consulting services	4,001.8	3,237.5	1,372.8	19.1
<b>Consulting services</b>	<b>12,782.7</b>	<b>10,124.2</b>	<b>4,421.8</b>	<b>20.8</b>
<b>2007<sup>r</sup></b>				
Management consulting services	8,131.6	6,478.6	2,815.1	20.3
Environmental and other scientific and technical consulting services	3,680.6	3,043.8	1,213.0	17.3
<b>Consulting services</b>	<b>11,812.2</b>	<b>9,522.4</b>	<b>4,028.1</b>	<b>19.4</b>

**Note(s):** According to the North American Industry Classification System (NAICS 5416). See "Data sources, definitions and methodology" at the end of tables for definition of terms.

**Table 6**  
**Breakdown of sales for consulting services, Canada, 2009**

	percent
<b>Management consulting services (NAICS 54161)</b>	
Strategic management consulting services	25.4
Financial management consulting services	10.5
Marketing management consulting services	7.4
Compensation and benefits consulting services	4.2
Other human resources management consulting services	13.9
Operations and supply chain management consulting services	5.5
Other management consulting services	25.9
Other Sales	7.2
<b>Total</b>	<b>100.0</b>
<b>Environmental consulting services (NAICS 54162)</b>	
Environmental assessments	1.3
Environmental audits	26.4
Site remediation planning services	3.8
Natural resource management consulting services	11.1
Waste management consulting services	8.7
Environmental policy development consulting services	5.6
Other environmental consulting services	7.4
Other Sales	35.7
<b>Total</b>	<b>100.0</b>
<b>Other scientific and technical consulting services (NAICS 54169)</b>	
Economic consulting services	4.8
Geological and geophysical consulting services	13.1
Soil management, crop and animal production consulting services	1.4
Heritage consulting services	0.8
Occupational health and safety consulting services	7.7
Other scientific and technical consulting services	57.8
Other sales	14.3
<b>Total</b>	<b>100.0</b>

**Note(s):** According to the North American Industry Classification System (NAICS 54161, 54162, 54169). See "Data sources, definitions and methodology" at the end of tables for definition of terms. 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.

## Data sources, definitions and methodology

### Description

This annual sample survey collects data required to produce economic statistics for the Consulting 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 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.

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

### 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-X).

## 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 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 2,367 collection entities.

## Quality evaluation

Prior to dissemination, combined survey results are analyzed for overall quality; in general, this includes a detailed review of individual responses (especially for the largest companies), an assessment of the general economic conditions portrayed by the data, historic trends, and comparisons with other data 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.

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 84.5%. CVs were calculated for each estimate. The CVs are available upon request.

### Related products

#### Selected CANSIM tables from Statistics Canada

360-0001	Consulting services, summary statistics, by North American Industry Classification System (NAICS), annual (225 series)
360-0020	Consulting services, operating expenses, by North American Industry Classification System (NAICS), annual (percent) (21 series)
360-0021	Consulting services, sales by type of client based on the North American Industry Classification System (NAICS), annual (percent) (5 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.



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### 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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