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**Data Collection in the Co-operative Sector
and Sources of Other Business Statistics
in Canada and the United States**

ANGELA WAGNER
under the direction of
CRISTINE DE CLERCY

Occasional Paper Series

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CENTRE FOR THE STUDY OF CO-OPERATIVES



UNIVERSITY OF
SASKATCHEWAN

DATA COLLECTION
IN THE CO-OPERATIVE SECTOR

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Creating Social Cohesion through Market Relations.”*

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IN CANADA AND THE UNITED STATES

Compiled by
Angela Wagner
Under the Direction of
Cristine de Clercy



CENTRE FOR THE STUDY OF CO-OPERATIVES
UNIVERSITY OF SASKATCHEWAN

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Centre for the Study of Co-operatives
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CENTRE FOR THE STUDY OF CO-OPERATIVES

THE CENTRE FOR THE STUDY OF CO-OPERATIVES is an interdisciplinary teaching and research institution located on the University of Saskatchewan campus in Saskatoon. Contract partners in the co-operative sector include Credit Union Central of Saskatchewan, Federated Co-operatives Ltd., Concentra Financial, and The Co-operators. The centre is also supported by Saskatchewan Regional Economic and Co-operative Development and the University of Saskatchewan, with the CUMIS Group making an additional contribution. The university not only houses our offices but provides in-kind contributions from a number of departments and units—Agricultural Economics, History, Management and Marketing, Political Studies, and Sociology, among others—as well as financial assistance with operations and nonsalary expenditures. We acknowledge with gratitude the ongoing support of all our sponsoring organizations.

The objectives of the Centre are:

- to develop and offer university courses that provide an understanding of co-operative theory, principles, developments, structures, and legislation;
- to undertake original research into co-operatives;
- to publish co-operative research, both that of the Centre staff and of other researchers; and
- to maintain a resource centre of materials that support the Centre's teaching and research functions.

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Our publications are designed to disseminate and encourage the discussion of research conducted at, or under the auspices of, the Centre for the Study of Co-operatives. The views expressed constitute the opinions of the authors, to whom any comments should be addressed.

PART ONE

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THE STATUS OF DATA COLLECTION IN THE CO-OPERATIVE SECTOR

A SUMMARY OF INFORMATION IN CANADA AND THE UNITED STATES

INTRODUCTION

QUANTITATIVE DATA SETS are commonly used in academia, in industry, and by governmental bodies to gain a wider understanding of economic and social phenomena. Within academia, statistics are essential to research on restructuring in industrial economies, determining the success or decline of certain business sectors, and so on. Policy decision making at all levels of government also requires good evidence, thus the need for good data sets. Government agencies such as Statistics Canada and the Census Bureau in the United States collect a range of financial and other data related to industry and a variety of activities within each country, further highlighting the importance of statistical data to decision making within government.

The co-operative sector is relatively important to North American economies but is largely overlooked with respect to empirical data collection. Co-operatives are business enterprises formed by an association of members who see a need for their services. They are found in many sectors of the economy, including agriculture, finance, retail, telecommunications, energy, and healthcare, to name but a few (CCA 2004).

As with other businesses, data sets on the co-operative sector are important to policy makers and stakeholders for determining not only the scope and health of the sector but also for policy decisions at all levels of government. The primary objective of this paper is to explore the state of data collection in the co-operative sectors of Canada and the United States.

The paper is organized as follows. The first section will outline the strategies used to document data collection on co-ops in the US and Canada. The second section will record and summarize the research findings, while the third will highlight some deficiencies in the data that is presently available and make comparisons with the data at hand. The paper will conclude with suggestions at the data, sector, and partnership levels on how to improve data collection on North American co-operatives in the future.

RESEARCH OBJECTIVE AND METHODS

AS MENTIONED ABOVE, this project aims to document the status of statistical data collection on the co-op sectors in the US and Canada. The majority of the work was carried out over four months in the summer of 2003 and was updated in the spring of 2006 prior to publication. First, the researcher conducted a general Internet search of Canadian government and co-op sector websites, gleaning the former from the Government of Canada's alphabetic listing of federal departments and agencies housed on its main site (canada.gc.ca). She investigated these websites either through internal search engines or by manually exploring each web page for documents related to co-operatives, data, or statistics. Where it was not discernible from the website whether or not the department/agency was collecting co-op data, she made contact via e-mail or phone and asked the following:

- Are you collecting data on co-operatives?
- If so, how is the data collected?
- Are you collecting data on every co-operative in the country, regardless of sector, affiliation, or profit/non-profit status?
- What is the level of accessibility to the public, and is there a cost involved?

The researcher also asked federal departments such as the Co-operatives Secretariat to suggest appropriate co-op sector agencies to contact with data collection inquiries.

She used the same process at the provincial level. Where it was not easily determined which departments collected co-op sector data, she sent e-mails to webmasters or general inquiries addresses to discover which departments were responsible for "monitoring and regis-

tering co-operatives at the provincial level.” Once these were determined, she sent e-mails requesting information about the methods, scope, and accessibility of their data collections.

Finally, she searched Canadian co-operative sector websites (e.g., umbrella organizations, specific associations), which were determined through firsthand knowledge of important sector agencies, links on other searched sites, and suggestions from other contact persons. Again, when the scope, methods, and accessibility of the data were not easily discernible on the website, she contacted the agency directly.

Due to a lack of knowledge about the co-operative sector in the country, the researcher found it necessary to alter slightly the search methods used for American websites. At the federal level, through an examination of the US Census Bureau’s Statistical Abstract of the United States,¹ she identified agencies that were particularly active in collecting statistics and that might therefore be collecting co-op data. She then searched and contacted them in the same manner as the Canadian websites described above.

She found sector-specific agencies in the United States through general search engine inquiries, links on other searched sites, and through prior knowledge. As in other cases, when it was not clear if data collection was being undertaken, these agencies/associations were contacted directly in the format described above.

Finally, the researcher began to contact individual state legislatures to find out if any departments were collecting co-op data. After discovering through American researchers that state-level data collection on co-operatives was essentially not being done in the United States, however, she discontinued this endeavour.

RESULTS — CANADA

DATA ON CO-OPERATIVES, nonfinancial co-operatives in particular, is variable in terms of both quality and accessibility across provinces in Canada and at the national level as a whole. While not every province responded to inquiries

1. Accessible at www.census.gov/statab/www.

related to data collection,² those that did reported varied data collection strategies, lengths of time for which data had been collected (leading to varied time series), and varied public accessibility to data. Provincial governments are mandated with the responsibility of incorporating and regulating co-operative enterprises, both financial and nonfinancial, and this inevitably has an impact on the differences in type and scope of information collected across the provinces. Because of organizational differences between financial and nonfinancial co-operatives across the country, there are extreme differences in the level and nature of data collected from these two co-operative types. Provincial data collection on financial and nonfinancial co-operatives will thus be discussed separately.

Nonfinancial Co-operatives

Because of provincial responsibility, data collection for nonfinancial co-operatives varies among provinces, which makes national comparisons problematic. Each province has its own requirements in terms of what data has to be filed with the government. While some provinces are active in comprehensive data collection, others, because of funding shortfalls and other setbacks, gather very little if any wide-ranging data on co-operatives. Québec, for example, collects comprehensive and robust statistical data on co-operatives and caisses populaires in the province. It has also been proactive in ensuring that the data is widely accessible to the public. The department responsible for monitoring co-operatives in the province, the Ministère du développement économique et régional, has a database that is updated annually, as it is mandated by law that co-operatives in the province file an annual report with the department. Unlike the majority of provinces, where basic financial information is often the only obligation, data requirements in Québec include a variety of information both financial and nonfinancial in nature. The province collects information related to the economic strength of the co-operative (e.g., balance-sheet information) and also social aspects of the organization (e.g., number of employees, number of members, percentage of business conducted with members). At the provincial level, the department keeps up-to-date statistics on the number of co-operatives in each sector, the number of active co-operatives, the number of mergers, and the number of dissolutions and liquidations (Mercier 2003).

2. See Appendix A, pp. 24–30, for a listing of the provinces/territories responding and the data collected.

The government is also transparent about public access to the data, publishing online documents outlining details about provincial co-operatives (e.g., Finances, Économie et Recherche Québec 2002). In addition, the department is agreeable to releasing aggregated data, free of charge, to interested persons, provided the use of the data is disclosed (Mercier 2003).

While Québec offers a good example of comprehensive statistical data collection at the provincial level, there are other provinces where data collection is nonexistent or has been scaled back considerably due to budget cutbacks and the attitude of governing parties towards co-operative development. The Financial Services Commission of Ontario (FSCO), for example, which is responsible for nonfinancial co-operatives in the province, does not keep up-to-date information on these organizations. Co-operatives in Ontario are not mandated to provide annual reports to FSCO; they are merely required to register with FSCO when they are created. Accurate information on co-operatives in Ontario is thus not available, let alone precise tallies of the number of co-operatives in the province (Andrews 2003).

A second example arises from the data collection done by the Registry of Co-operative Services, a division of the Government of Newfoundland and Labrador. While the government requires co-operatives in the province to file annually with the registry — providing such information as financial statements, type of co-operative, number of members, and number of employees, among other things — this information has not been compiled into aggregated information for many years (Perry 2003). The data is thus not accessible to the public due to the lack of time and personnel to compile it. Furthermore, at the time of the last correspondence with Mr. Perry, the Commercial Registrations Division responsible for the registry had declared its intention to seek legislative changes that would scale back the amount of information required from co-operatives filing with the registry. This will make accurate analysis of the co-operative sector in this province especially difficult.

Financial Co-operatives

Active and comprehensive data collection is being undertaken for financial co-operatives in Canada, which include both credit unions and caisses populaires. This is most likely due to

the fact that they are financial institutions, in charge of members' finances, and thus more closely regulated and monitored. While some provincial governments have registries responsible for monitoring credit unions or caisses populaires, the majority of data collection is being done by provincial credit union centrals (CUCs) or deposit insurance/deposit guarantee corporations (see Appendix A).³

With respect to credit unions, while some centrals were quick to respond to inquiries, others were not, even after repeated attempts to inquire about the status of their data collection. Those that did respond about the nature of the data, however, were quick to highlight its limited access to the general public, citing privacy and other issues for their members. Public accessibility is mainly restricted to data housed in the centrals' annual reports, which for some provinces are accessible online.

Generally, provincial centrals collect data within a regular time frame. Most of the data they collect is financial in nature — for instance, updates from member credit unions' income statements and balance sheet information. Some organizations, however, such as CUC of Nova Scotia or Prince Edward Island, also collect membership and employee statistics (Archibold 2003; Turner 2003).

In some provinces, the responsibility of collecting credit union data falls to the deposit guarantee/deposit insurance corporations. In Alberta, for instance, the Credit Union Deposit Guarantee Corporation collects financial statistics on the credit union system, a duty it shares with the province's credit union central (Risbud 2003). The data collected by deposit guarantee/deposit insurance corporations is similar to that collected by the provincial centrals. As with the centrals, where individuals did respond to inquiries, they noted primarily that they were collecting financial information, although some organizations, such as the Credit Union Deposit Guarantee Corporation in Newfoundland, are collecting membership and employee statistics as well (Langthorne 2003). Again, these organizations were also quite proprietary about their data, restricting public access mainly to information included in annual reports, which for many corporations are available online.

3. Provincial credit union centrals help to maintain credit union liquidity at the provincial level. Centrals may also provide data processing services, asset/liability management, management services, etc., to their member credit unions. Deposit insurance/deposit guarantee corporations are government-controlled organizations designed to protect the deposits of credit union members.

Caisses populaires in Canada are also highly regulated financial institutions, and organizations at the provincial level are actively collecting data on these co-operatives. For the most part, these institutions are found in Francophone areas of the country such as parts of Ontario and Québec. In Ontario, the researcher contacted Caisse Alliance, the organization responsible for caisses populaires, which declined to disclose any information after inquiring about the intended use of the data.

In Québec, data on provincial caisses populaires and credit unions is collected by the Québec Deposit Insurance Board. Like other insurance corporations, it requires these co-operatives to file annual statements outlining their financial statistics. The Québec board also monitors the number of amalgamations and bankruptcies in the province, although it does not require these co-ops to disclose data related to membership statistics and the number of full and part-time employees (Fortin 2003). The data accessible to the general public is restricted to the information posted on the Deposit Insurance Board's website, which includes standard, aggregated financial information.

The nature of co-op regulation in the country, which mandates provincial responsibility over co-operatives, severely impacts data collected on a national scale. The type of data is also influenced by how co-operatives are classified nationally with respect to income tax forms and industrial classification systems. The state of data collection at the national level is thus similar to that in the provinces.⁴ While there are comprehensive statistics on financial co-operatives in the country, only one federal agency is attempting to collect similar information on nonfinancial co-operatives, and its ability to do so is restricted.

The Co-operatives Secretariat (www.agr.gc.ca/policy/coop), a division of Agriculture and Agri-Food Canada, has been actively attempting to collect national statistics on nonfinancial co-operatives, maintaining a database since 1984 and through various departments (which have changed over time) releasing yearly publications of nonfinancial co-operative statistics since 1941. Originally titled *Co-operation in Canada*, the title was changed to *Co-operatives in Canada* in 1995.

Information collected by the Co-operatives Secretariat is somewhat detailed. Recent

4. See Appendix B, pp. 31–32, and also Part Two, beginning on page 39.

statistical information provides numerical breakdowns of the types of nonfinancial co-operatives in the country within each province. It also includes balance sheet information, numbers of full- and part-time employees, and number of members, broken down provincially and by co-op type.

The range of data collected over time has remained quite consistent and thus would be a good source of time-series data for nonfinancial co-operatives. There are, however, a few issues. Between the years 1978 and 1993, data reported in *Co-operation in Canada* was broken down by region (i.e., the West, Ontario/Québec, etc.) rather than by province, which would make long-range comparisons difficult. And from 1993 on, co-operative wholesale statistics, kept separately prior to that date, were incorporated into the main data tables.

Because of provincial differences in the type of data required, the Co-operatives Secretariat's data schemes are complex. Although the secretariat asks provincial registries to provide data on their co-operatives, many provinces, as noted, are not keeping accurate statistics on nonfinancial co-ops (McCagg 2003). In an attempt to collect meaningful statistics itself, the Co-operatives Secretariat issues annual surveys to known nonfinancial co-operatives in the country, but the co-ops are not always willing to share this information, and without legislation requiring disclosure, response rates are usually low and multiple mailings of surveys are required to garner sufficient data (McCagg 2003). Where co-operatives do not submit information but they are known to be active, the secretariat uses estimates based on previous years' filings. Using these methods, the secretariat is confident that it captures about 90 percent of co-operatives in Canada. Thus, while they are the only definitive source of nonfinancial co-operative statistics nation-wide, the publications issued by the Co-operatives Secretariat are not 100 percent representative of the sector.

Although the Canada Customs and Revenue Agency (CCRA) and Statistics Canada are primary sources of aggregate statistics on Canadian business and economics, they are not collecting data on nonfinancial co-operatives. The main reasons are related to how businesses are recorded or identified within these two governmental agencies. The CCRA monitors businesses' import and export information, as well as overseeing federal income tax. When co-operatives file income tax, they can file either as corporations or as nonprofit organizations. Furthermore, since the co-operative model is not a form of ownership recognized

in CCRA forms (Shoemaker 2003), income tax and other data is being merged with other corporations or nonprofit organizations in the country.

The fact that co-operatives are not recognized as either a form of ownership or business type explains the lack of data collection on co-operatives at Statistics Canada. When the agency collects information on businesses, that data is organized by the North American Industrial Classification System (NAICS); prior to 1997 this was done via Standard Industrial Classification (SIC) (Statistics Canada 2004). These systems assign codes to companies based on the industry under which they fall. Nonfinancial co-operatives are found in many different industries — grocery retailing, healthcare, agriculture, etc. — so co-operatives are often grouped with other privately owned businesses in the same industry rather than kept separate.

Surprisingly, credit unions and caisses populaires have SIC/NAIC codes assigned to them, thus Statistics Canada does have data on these types of co-operatives. Publicly available statistics on credit unions and caisses populaires are primarily limited to nationally aggregated figures and are financial in nature, although some of the data includes asset, liability, and member equity aggregates, and balance sheet and income statement aggregates.

One program that appears promising for data collection on co-operatives at the federal level is the Voluntary Sector Initiative (VSI), a joint project between the Government of Canada and the nation's voluntary sector that aims to strengthen the sector's ability to meet the needs of Canadians, and to improve the relationship between the voluntary sector and the federal government. According to the VSI mandate, co-operatives fall under the definition of the voluntary sector.

One of the VSI goals is to increase the level of research on the voluntary sector in Canada, and to this end it has created two data collection projects. The first will establish an account at Statistics Canada titled the Satellite Account of Nonprofit Institutions and Volunteering. Once fully operational, it will highlight the contribution of the nonprofit sector to the nation's economy. Data sources for this account are administrative in nature and include business registers and income tax information returns from the Canada Customs and Revenue Agency.

According to Catherine Bertrand of Statistics Canada's Nonprofit Sector and Unpaid Work Analysis Division, the Satellite Account is not currently collecting data on co-operatives (Bertrand 2004) since work on the nonprofit sector is based on the international definition of nonprofit institutions, which does not encompass co-operatives. Although Statistics Canada may broaden its definition of nonprofit institutions in the future, there are no immediate plans to do so.

Another VSI data collection initiative is the National Survey of Nonprofit and Voluntary Organizations (NSNVO), headed by the Canadian Centre for Philanthropy. The goal of this survey is to improve our understanding of nonprofit and voluntary organizations in Canada. The sampling frame was determined from the CCRA's charities file, provincial listings of incorporated nonprofit institutions, and Statistics Canada's Business Register. The first set of data from this survey was scheduled to be released in the fall of 2004. Unfortunately, although the study examines registered and incorporated nonprofits and charities, it would not be possible to segment any data on co-ops from this larger data set (Turner 2004).

At the national level, Credit Union Central of Canada (CUCC) has publicly available statistics on all financial co-operatives in Canada, both affiliated with the credit union system and nonaffiliated, such as caisses populaires. Information is accessible at the CUCC website (www.cucentral.com). The data includes statistics on savings, loans, assets, credit unions, locations, and members. CUCC also collects other data, including balance sheet and income statement information, but this is not accessible to the public (Brizland 2003).

Another important entity is the Canadian Co-operative Association (CCA), the national umbrella organization for Anglophone co-operatives. On occasion, CCA issues special-topics surveys related to Canada's co-operatives. One example is the Community Involvement Survey (CCA 2002), where CCA surveyed co-operatives on their level of social involvement within the communities of which they were a part. Unfortunately, although it was from a national-interest organization, the survey received a relatively low response rate (approximately 12 percent). Brenda Heald, manager of corporate and member communications at CCA, commented on this lack of interest (2003), noting that CCA had originally intended to create an information clearing-house for CCA members in which one of the types of information disclosed would be data on the composition of co-op boards. Due to a lack

of interest among members, however, the clearing-house has fallen into disrepair and is not being regularly updated.

The national organization representing Francophone co-operatives, the Conseil Canadien de la Coopération (CCC), collects data on Francophone co-ops in the country. Publicly available statistics, housed in the annual report, include the number of co-operatives, the number of employees, leaders, assets, and volume of business (Audet Gravel 2004).

RESULTS — UNITED STATES

DATA COLLECTION ON THE CO-OPERATIVE SECTOR in the United States is much less systematic than in Canada, possibly speaking to the lesser importance of co-operatives in the US economy or to less integration among co-operatives in the country.⁵ Agricultural co-operatives and credit unions are the two co-op types for which the most systematic data collection occurs. Information on other co-operative types is scattered, found in various federal or sector surveys.

The Rural Business-Cooperative Service (RBS) (www.rurdev.usda.gov/rbs), a division of the Department of Agriculture, has been attempting to systematically collect data on agricultural co-ops in the country, issuing an annual publication titled *Farmer Cooperative Statistics*, a compendium of data on agricultural and fishery co-operatives in the United States (RBS 2004). The data for these reports is derived from a mailed survey; where co-operatives did not respond, the RBS used estimates.

Publicly available online data from these publications extends back to 1992.⁶ Much of it is financial in nature, showing gross business volumes, net incomes, balance sheet information, and so on. There are also statistics related to employees and membership, including membership tallies, membership by gross business volume, full- and part-time seasonal

5. See Appendix C, pp. 33–35, and also Part Three, beginning on page 113.

6. These statistics are available at www.rurdev.usda.gov/rbs/pub/service.htm.

employees, and total labour expenses. While every publication has nationally aggregated data, every other year also has data disaggregated by state. State-level information will thus appear next for data from 2003.

The RBS also has publications related to special surveys or historical data sets, which are available to the public at the RBS website. *Cooperative Historical Statistics* (1998), for example, is a compilation of data on agricultural co-operatives going back to 1863. The data is again primarily financial in nature, highlighting business volumes by commodity and market-share information, along with membership and co-operative totals. Other surveys include compilations of employees, sales, and assets of selected farmer co-operatives, export information on farmer co-operatives in international trade, and collected information co-operatives in different agricultural sectors, such as dairy co-ops in the US.

Other federal agencies in the United States gather statistics on a variety of co-op types. The Energy Information Administration (EIA) (www.eia.doe.gov) collects data related to electric co-operatives in the US, but this information is a subset of statistics on the electric industry as a whole. The EIA data, published in various documents,⁷ includes summary financial data, number of co-operative utilities, electricity purchases from co-operative borrowers, revenue and expense statistics, and balance sheet and income statement information. Time series with some of this data would be possible, as several EIA publications have prior issues available and the nature of the data has not changed over time. Many of the publications have been discontinued or have not been recently updated, however, with the most recent information being from 2001.

The United States Census Bureau (www.census.gov), the primary data collection agency in the US, has two surveys that include co-operative data. The American Housing Survey,⁸ contains information on housing co-operatives, but unfortunately, this data is aggregated with condominiums. Otherwise it would be possible to identify the co-operatives in the sample as housing co-ops are geographically clustered within the state of New York. Because of the aggregation of the information, however, the co-operative data cannot be extracted from the public-use files (Williams 2003). Data from the survey includes statistics on

7. See Appendix C, pp. 33–35, and also Part Three, beginning on page 113.

8. Accessible at www.census.gov/hhes/www/housing.html.

the number of seasonal, year-round, occupied, and vacant units, household characteristics for type of housing unit, etc. This data has been available online since 1993 and the variables have remained consistent over time.

The US Census Bureau also conducts an Economic Census⁹ every five years, which captures virtually every industry in the country except agricultural, fisheries, and forestry industries. While most statistics are collected by self-report forms, small-business data is captured using administrative records from the Internal Revenue Service and the Social Security Administration. Since the Economic Census captures and organizes data on the US economy using NAIC codes, it includes information on credit unions, which once again is financial in nature. Surprisingly, the 1997 Economic Census also captured data on wholesale/retail co-operatives, which is available online (US Census Bureau 2000; 2001). Other co-operatives for which data has been collected (garnered by viewing collection forms used in the census) include housing and electric co-ops, although this information was not available in the public-access files.

It is difficult to determine if the US Economic Census is a reliable source for the co-operatives included in the survey. Since attempts to contact the Census Bureau with data-collection inquiries have not met with success, it was impossible to establish the level of accessibility to co-op sector data, or even the possibilities of time-series data from previous censuses.

As in Canada, credit unions appear to be the most closely monitored sector, with comprehensive statistics being collected federally and sectorally. Credit unions in the US are differentiated by the fact that they are either federally or state insured. The National Credit Union Administration (NCUA) (www.ncua.gov) is the US agency responsible for monitoring federally insured credit unions (FICUs). The NCUA also makes data on FICUs publicly available on its website, both aggregated and individual. Aggregated statistics include consolidated balance sheets, loan statistics, number of credit unions by state, and assets by state. Data on individual credit unions includes assets, members, equity, income-statement information, and so on. Both have remained stable over time and thus make excellent time-series data, with information available since 1996 for aggregated data and 1990 for individual

9. Accessible at www.census.gov/epcd/www/econ97.html.

financial performance reports. There may be other types of FICU data available to the public through the *Freedom of Information Act*,¹⁰ although there would be a fee involved in viewing it (Roscoe 2003).

The Credit Union National Association (CUNA) (www.cuna.org), the trade association representing American credit unions, is an excellent source of data on both federally and state-insured organizations. PDF files on its website provide state-level statistics on the number of credit unions, membership information, assets, and savings loan reserves.¹¹ There is a possibility of time series with this data, although the length of time for which data is available varies by state. CUNA also maintains data that compares American credit unions to banks, highlighting such aspects as average size, asset growth, and total assets. Compiled from state and federal credit union regulator data, CUNA's records are presently the only source of data encompassing the entire credit union sector in the United States. The data on the website is essentially what is available for public use, although CUNA will perform special data runs at a cost, if so requested (Shafroth July/August 2003).

Aside from the sources presented above, there is little comprehensive data collection occurring in the United States, particularly for organizations such as retail, health, and child-care co-operatives. Some sector-specific organizations do their own surveys. The *Cooperative Grocer* magazine (www.cooperativegrocer.coop), for example, has attempted to collect information on retail co-operatives via retail-operations surveys and human-resources surveys, and through these the magazine has gleaned some data related to income, expense margins, percentage of sales to members, etc. Since these are voluntary surveys, however, it is unlikely that they would capture more than a fraction of retail co-operatives in the country. The researcher contacted other national sector associations, in particular the National Cooperative Business Association (www.ncba.org) and the National Cooperative Bank (www.ncb.coop), requesting information about their data-collection activities, but they did not respond to inquiries.

Absent from this discussion is a description of data collection at the state level,

10. The *Freedom of Information Act* is a federal statute that allows disclosure of information to the general public, except that which is exempt by law (www.info.usda.gov/nrcs_foia/).

11. Accessible at www.cuna.org/econ/long_run.html.

which is the level of government primarily responsible for co-operatives in the country. A researcher in the United States with knowledge of American co-operatives commented that very few, if any, states collected co-operative statistics on a regular basis (Lawless 2003). Although the present researcher attempted several inquiries at the state level, they proved to be unfruitful and were discontinued.

DATA DEFICIENCIES/COMPARABILITY

AS SHOWN ABOVE, data collection on the co-operative sector in both Canada and the United States is in a sorry state. With the exception of credit union regulation in both countries, regulation and monitoring of nonfinancial co-operatives is scattered, particularly so in the US, and this affects the nature of the data collected. While Canada has a federal agency, the Co-operatives Secretariat, attempting to collect statistics on nonfinancial co-operatives, there is no such agency in the US, which creates differences between the two countries with respect to knowledge of their co-operative sectors.

Data variability makes sound comparisons among countries, provinces, and states difficult. Provincial comparisons based on Co-operatives Secretariat data are possible, but must be considered in light of the fact that statistics for some provinces have to be estimated because of poor data collection. Comparisons between countries with respect to nonfinancial co-operatives would have to be restricted to those organizations in the US that are being monitored regularly, essentially farmer co-ops. The Rural Business-Cooperative Service attempts to collect robust statistics on farmer co-operatives, and if it is possible to extract Canadian farmer co-operatives from the Co-ops Secretariat's pages, basic financial statistics such as volume of business, for example, would be comparable between the two countries. Comparisons with other nonfinancial co-operatives for which data is collected in the US, such as electricity co-ops, would be difficult since this information has not been regularly updated by US agencies.

State-to-state comparisons in the United States with respect to nonfinancial co-operatives again would have to be essentially restricted to data collected by the RBS, thus to farmer co-ops. Determining the status of data collection at the state level in the US was difficult, and as mentioned, it is suspected that there is little taking place.

The credit union sector offers the best option for comparisons at provincial and state levels and between the US and Canada. Comparable provincial statistics are available from Credit Union Central of Canada, but the data is very basic and due to privacy restrictions, the possibility of getting more detailed statistics from CUCC is slim. In the US, state comparisons can be made for the whole credit union sector using Credit Union National Association data, although as is the case in Canada, the data is very basic and it would likely not be possible to gather more detailed statistics. Comparisons between the two countries can be made using both CUCC and CUNA data. Although the statistics are not very detailed, it would be possible to compare the number of members and the assets.

DISCUSSION AND CONCLUSION

IN ORDER TO DETERMINE the success and future possibilities of the co-operative sectors in Canada and the United States more accurately, comprehensive co-operative data collection, financial and nonfinancial, has to be made a priority of both the sector and the government. The best improvement to data collection in both countries would be for provincial and state governments to co-ordinate the types of data collected on co-ops under their jurisdiction, or for federal agencies to have it mandated by law that co-operatives provide information to them. Another positive change, particularly in Canada, would be to have tax and other federal documentation forms recognize the co-operative model as a type of organization or ownership.

Short of wide-ranging changes in legislation and monitoring at all levels of government in both countries, the above recommendations to improve data collection will likely

not occur any time in the near future. Responsibility should thus fall to the co-operative sector itself and to other interested bodies such as academic research units in both countries. Understanding that this information is beneficial to the co-operative movement as a whole, co-op businesses and sector organizations have to be more forthcoming in data disclosure. Co-operatives need to work in partnership with national interest groups — the Canadian Co-operative Association/Conseil Canadien de la Coopération, Credit Union Central of Canada, the Co-operatives Secretariat — to provide a clearing-house for comprehensive statistical information in Canada. In the United States, possibilities for data collection include partnerships among the Rural Business-Cooperative Service, the National Cooperative Business Association, and the Credit Union National Association. Other possibilities for data partnerships include research units in both countries — examples in Canada include the Centre for the Study of Co-operatives and the British Columbia Institute for Co-operative Studies; in the United States, the University of Wisconsin Center for Cooperatives. These units may also provide the opportunity for research services to the co-operative sector with the data collected.

It is important to improve not only the way in which co-op sector data is collected, but also the types of data that are gathered. This examination has shown that where data is collected, it has focussed on the financial aspects of co-operative operations, such as income statements, balance sheet information, volume of business data, and so on. Statistics on the social aspects of co-operatives have been primarily limited to basic information on the number of members and full- and part-time employees.

More information needs to be collected on the social aspects of co-operatives, both within each country and abroad. Co-operatives promote themselves as organizations that serve community and economic development functions; information needs to be collected that highlights this and will serve as evidence for policy and funding agencies. First, there should be more data collected that underlines the impact of co-operatives on the communities within which they are based. The Canadian Co-operative Association's Community Involvement Survey attempted to gather statistics of this sort, asking questions related to the extent and nature of donations to the community — if they were monetary or donations of space, equipment, technical assistance, etc. In addition, the survey asked what sorts of

community projects the co-operatives supported and whether or not they gave preference to local suppliers (CCA 2002).

Related to the social aspects of co-operatives is the need for more comprehensive “people statistics,” that is, data related to members, boards of directors, and employees. Useful information would include the gender and ethnic composition of members, board members, and employees. Other demographic data could include the ages, average incomes, and occupations of members; the percentage of members at the last annual meeting; the percentage of business done with members; the average length of membership; the percentage of community members employed by the co-operative; salary statistics for employees; and whether employees are unionized. Data related to co-operative education would also be beneficial — average spending and distribution of spending on co-op education; which groups are targeted for educational programs; the types and proportions of educational methods used (pamphlets, conferences, etc).

Data should also be collected with respect to co-operative contributions to international development projects, e.g., time and/or monetary donations, equipment, research assistance, and so on.

Second, although most of the data presently collected on co-operatives is financial, these statistics need to be improved to enable researchers, stakeholders in the co-op sector, policy makers, and others to fully gauge the strength of the co-operative sector in the United States and Canada. According to Doug Elliott (2003),¹² statistics essential to analysing the success of an economic sector include the gross domestic product, employment statistics, gross payroll data, gross sales, value of merchandise shipped outside of Canada (exports, international trade), manufacturing activity (value of shipments for manufacturers), count of business by industry, and farm cash receipts (annual gross receipts for co-operative farms). Virtually no information related to these points is currently being collected on co-operatives in either the United States or Canada. Improvements to data collection clearly need to be made.

12. Doug Elliott is owner of QED systems, which publishes *Sask Trends Monitor*, a newsletter that analyses social, economic, and other trends for the Province of Saskatchewan.

Finally, in order to understand regional, provincial, state, or national trends, it is necessary to change the geographic levels at which data are organized. Generally, the smallest scale at which data are aggregated is at the provincial or state level, with the exception of Québec, where co-operative data is aggregated regionally within the province. Collecting data at the lowest possible regional level (e.g., rural municipality, county, etc.) would enable the detection of clusters (or lack) of co-operatives, determine the relative success of co-operatives in specific regions, or decline in others, and would help develop specific policies to encourage further growth or to aid in future co-operative development. Another useful distinction would be to highlight whether co-operatives are “rural” or “urban,” which would be helpful for a geographical analysis of co-operatives in both countries.

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PART TWO

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STATISTICS ON THE CO-OPERATIVE SECTOR IN CANADA

CREDIT UNION CENTRAL STATISTICS

Credit Union Central of Canada

www.cucentral.ca

Credit Union Central of Canada (CUCC) requests financial results from the provincial centrals, or in some cases, the provincial deposit guarantee corporations, on a quarterly basis. Information on nonaffiliated credit unions/caisses populaires is from the deposit guarantee corporations. This data is posted on the website.

CUCC has been collecting data since the 1970s, but in those early days was only gathering general statistics (e.g., assets, membership, etc.). Prior to the mid-1980s, only consolidated results from credit unions and caisses populaires were available.

The information posted on the website is gathered on a quarterly basis. More detailed information, such as credit union balance sheets and income statement information is collected on an annual basis. The only data available to the public, however, is that which is posted on the website, with the more detailed statistics being collected for internal analysis alone. CUCC's provincial affiliates provide this information in strictest confidence. If someone outside the credit union system is interested in more detailed statistics, they should contact individual provincial credit union systems.

- data online includes financial statements and credit union system statistics (click on “Financial Data” link on main page); reported by quarter — online data begins 4th quarter 1999; previous data may be available from CUCC
- information is broken down by central/noncentral affiliation, caisses populaires, and province
- data includes savings, loans, assets, credit unions, locations, and members (estimations in some provinces)

Data collection contact: Sandra Brizland, brizlands@cucentral.com, (416) 232-3420

Provincial Credit Union Centrals

The primary function of provincial credit union centrals is to maintain credit union liquidity at the provincial level. Other services provided include asset/liability management; marketing and communications services; research activities; education programs; data processing; management services; and so on.

Collecting statistical information from provincial centrals (as per Sandra Brizland's suggestion) was not overly successful, as many centrals were very proprietary about their data. Most wanted to know the intended purpose of the information they released, even if it were a simple tally of the data collected.

The author originally thought that it might be feasible to compare statistics among the provinces by using the figures contained in their annual reports. A sample comparison of three provincial centrals (Saskatchewan, British Columbia, and Ontario), however, was not encouraging. Without knowledge of accounting terms and practices, it appears that only basic financial statement information would be directly comparable among the provinces. Certain aspects of each province's annual report are presented in more detail, others in less, which would make comparisons difficult. Not knowing what was included under terms such as "other" in individual annual reports, for example, would make it impossible to compare these figures.

Please note that Québec is not included below as there is no equivalent to the other provincial centrals in that province.

Caisse Alliance (Ontario)

www.caissealliance.com

- no annual report online
- contacted, but no response except to ask what the data was going to be used for

Credit Union Central Alberta

www.albertacentral.com/site/bins/index.asp

AlbertaCentral has access to credit union financial data from a Credit Union Deposit Guarantee Corporation (CUDGC) database to which credit unions submit information on

a monthly basis. Through the central's participation in the Canadian Bankers Association's (CBA) Market Share by Postal Code Program, it receives data on credit union market share for various asset and deposit products for the markets in which credit unions have a presence.

AlbertaCentral has had access to credit union financial data for many years, probably since credit unions began reporting to CUDGC (the 1980s), and it has participated in the CBA's Market Share since 1997.

The CUDGC material includes mainly financial data (balance sheet and income statement items), as well as some other statistics such as number of branches, ATMs, memberships, and FTEs (full-time equivalents). Through this data, the central tracks amalgamations and consolidations. The CBA Market Share data includes main asset and deposit product categories such as personal loans, business loans, RRSPs, term deposits, etc. For ad-hoc analyses, AlbertaCentral also has access to credit union banking system information from its member credit unions. Through the banking system, Central would be able to gather gender information on their membership, active vs. inactive accounts, as well as other detailed data not available through other channels.

Most of this information is not accessible to the general public, although AlbertaCentral can provide high-level performance data on the credit union system as a whole, depending on the nature of the request.

- 2002–2005 annual reports are online

Data collection contact: Anil Risbud, Senior Strategic Planning Analyst, anil.risbud@albertacentral.com, (403) 258–5928

Credit Union Central of British Columbia
www.cucbc.com, infocentre.cucbc.com

Credit Union Central of British Columbia (CUCBC) does not collect information directly from credit unions, but has a data-sharing agreement with Stabilization Central Credit Union, to which every BC credit union is required to send a monthly report.

The current Financial and Statistical Reporting (FSR) system commenced in April

1992. Prior to that, data was collected in a more rudimentary and incomplete form. Some accessible records go back to 1986; earlier than that would require a search. Limited annual data is available for the 1960s and 1970s.

The monthly FSR captures all income statements and balance sheet items, including data on staff (FTEs), membership, numbers of branches, and ATMs; there is no data on active/inactive members. It also tracks credit union mergers; no bankruptcies have occurred. Quarterly FSRs capture interest-rate risk, some loan portfolio details, and commercial-loan risk ratings. The Capital Adequacy Return collects details on the capital base, risk-weighted assets, and off-balance-sheet exposures.

The general public has limited access to this information. Main balance sheet and income statement items are available in CUCBC's annual report. The 2004 report features five- and ten-year statistical summaries of the credit union system.

- 2005 annual report and quarterly reports since 2000 are online at the CUCBC main Internet site (www.cucbc.com)
- statistics available at the Corporate Information Centre (infocentre.cucbc.com)

Canadian Statistics: Largest 100
infocentre.cucbc.com/pdf/4q102top100-dist.pdf

This publication shows the top 100 credit unions in Canada by asset size (does not include credit unions and caisses populaires in Québec). Data includes the credit union name; province of origin; its current ranking; asset size for the 2nd and 4th quarters of 2002; the number of members for each credit union; the number of locations; and the previous ranking in the list. Data is likely obtained from Credit Union Central of Canada.

Canadian Statistics: Credit Union/Caisse Populaire System Statistics — First Quarter 2003
infocentre.cucbc.com/pdf/1Q03stats-web.pdf

This publication does not provide raw data (i.e., number tables), but does offer charts and graphs of the Canadian credit union system as a whole (except those credit unions/caisses populaires not affiliated with Credit Union Central of Canada). Charts provided include the 2002 quarterly results; number of credit unions (from 2000 Q1 to 2003 Q1); number of credit union locations (from 2000 Q1 to 2003 Q1); and the number of members (from 2000 Q1 to 2003 Q1). The report also lists percentages of asset growth for each province for the year 2002. The information provided in this publication is accessible in raw form from the Credit Union Central of Canada website.

British Columbia Statistics: Assets and Membership
infocentre.cucbc.com/pdf/02_bccu_assetsmembership.pdf

This publication provides a listing of British Columbia credit unions; 2002 total assets; 2001 total assets; percentage change in assets; 2002 membership numbers; 2001 membership numbers; and percentage change in membership numbers.

British Columbia Statistics: British Columbia Statistics at a Glance
infocentre.cucbc.com/bc_stats.shtml

This webpage provides, from 1990 to 2003, a listing of the number of credit unions; number of branches; and number of members. These statistics would also be available at the Credit Union Central of Canada website (although not for as many years).

British Columbia Statistics: British Columbia Mergers — 1990 to Date
infocentre.cucbc.com/bc_mergers.shtml

This page provides a listing, by year, of credit union mergers in the province, including the names of the credit unions that merged, the date of the merger, and the new business name.

The CUCBC Infocentre provides other sources of information beside these statistical publications, including an online library database (you have to be affiliated with a credit union to order resources from it). It also has a listing of financial-sector journals and periodicals of interest (some of which have pdf/website links), and listings of special reports compiled by CUCC and CUCBC.

Data collection contact: Diane Walker, dwalker@cucbc.com, (604) 737-5971

Credit Union Central of Manitoba
www.creditunion.mb.ca

- no annual report online
- contacted, but no response

Credit Union Central of New Brunswick
www.creditunion.nb.ca

- 2005 annual report is online
- contacted, but no response

Credit Union Central of Newfoundland and Labrador

www.nlcu.com/Home/YourCreditUnion/AboutUs/CorporateReports/

- 2005 annual report is online

Credit Union Central of Nova Scotia

www.ns-credit-unions.com

Credit Union Central of Nova Scotia (CUCNS) maintains financial results for quarterly statistical reporting to the credit union system. Results are automatically downloaded through the data system and membership figures are confirmed annually from credit unions. CUCNS has been collecting financial and membership numbers for more than twenty years. Although there have been some changes to format, the data collected over that time has been generally similar. CUCNS collects statistics such as full-/part-time employees, active/inactive members, gender, bankruptcies, etc., as needed for benefits programs or other specific initiatives.

The information is not accessible to the general public. Public information is available through the superintendent's office (annual financial reports) or interested parties can obtain a summary of system results through the Credit Union Deposit Insurance Corporation and annual reports.

- 1998–2005 annual reports are online

Data collection contact: Mary Ann Archibald, marchibald@cucns.ca, (902) 453–0680

Credit Union Central of Ontario

www.ontariocreditunions.com

Ontario Central (CUCO) collects data only on its member credit unions (some credit unions are not members of the central). The Deposit Insurance Corporation of Ontario (DICO) collects financial data on all credit unions in the province, regardless of affiliation, as Ontario credit unions are required to file a return with this organization. Ontario Central does not collect any specific data regarding credit union membership (e.g., how many members a credit union has), and uses only certain types of data collected by DICO.

Data on credit unions begins to be collected as soon as they are formed in Ontario.

This data varies in form; financial statistics tend to remain similar across the years, but product data varies based on introduction to the market (e.g., Internet banking). For more details, interested parties should contact DICO.

The central collects information on full- and part-time employees for bonding purposes. Gender data would form part of this collection insofar as an employee (or a member) would at some time complete an application that would usually include an honorific field. Central does not track specifics on individual credit union members; this would fall under the responsibility of individual credit unions in the province.

Ontario Central does collect data on credit union amalgamations, purchase/mergers, dissolutions, etc. DICO and the Financial Services Commission of Ontario also collect these statistics for their records.

Financial statistics on CUCO membership are available in aggregate form only and through the annual report, located on the website.

An added note: “Ontario Central is bound by the federal privacy legislation (*Personal Information Protection and Electronic Documents Act*, or PIPEDA) and as such, we only collect data based on the principles of collection, use, and disclosure. Credit unions in Ontario will be bound by this legislation as of January 1, 2004. This being said, we have always protected the privacy of our member credit unions by not disclosing lists of credit unions to the public, suppliers, etc., and replying to requests such as this only in aggregate terms.”

- 2000–2005 annual reports are online

Data collection contact: Lesley Mansfield, lmansfield@cuco.on.ca, (905) 238–9400

Credit Union Central of Prince Edward Island
www.peicredicunions.com

Credit Union Central of Prince Edward Island (CUCPEI) performs annual inspections of the province’s ten credit unions, collecting data directly from the annual financial statements of each organization (financial statistics, number of members, staff numbers, etc.). Most of this information is available to the public in the form of a consolidated annual report prepared by CUCPEI.

For specific member information, CUCPEI has access to a database compiled by the credit unions. The database allows the central to perform any calculations they wish (age categories, product usage, etc.). This information is not accessible to the general public.

- no annual report online

Data collection contact: Darlene Turner, dturner@cucpei.creditu.net, (902) 566-3350

Credit Union Central of Saskatchewan

www.saskcentral.com

- 2002–2005 annual reports are online
- contacted, but no response

Stabilization Central Credit Union (British Columbia)

www3.stabil.com/public/index.html

Stabilization Central Credit Union (SCCU) is the initiative of BC credit unions for a system-operated stabilization organization distinct from the government-controlled deposit insurance corporation. SCCU monitors member organizations to identify emerging risk as early as possible.

Every credit union must submit a monthly prescribed form (currently called the monthly financial and statistical form), which details the balance sheet, income statement, and other pertinent information such as loan delinquency, etc. They must also supply an annual report based on audited financial statements. Almost every credit union in the province submits the information electronically. Files are entered into the SCCU database after being reviewed for accuracy. The database is used for early-warning monitoring routines. SCCU has developed an electronic program that facilitates the process; the Financial and Statistical Return (FSR) assists credit unions with the filing procedures and also allows them to do some edit checks before filing the return.

SCCU also collects FTEs for employees and active membership numbers. They do not collect information on such things as gender or bankruptcies. As part of their database maintenance procedures, however, they do know when mergers take place since their calculations take these events into consideration.

There is information available in the electronic database dating from early 1992, but

it is unclear how long SCCU has actually been collecting the information. The current information format was last revised in April 1996, although it has not really changed since 1992. The contact person at SCCU believes that information was collected by other agencies before SCCU was formed, but that it was much more limited in scope than the current formats.

The data is confidential. SCCU releases financial information with peer, asset group, and system comparables back to the individual credit unions. If they agree to share information among themselves, this is indicated in their downloads. SCCU also provides credit unions with a yearly audited statistical compilation, which details financial information based on audited data. This again is provided to credit unions only and it is up to them to police whom they allow to access it.

- 2005 annual report is online

Data collection contact: Darren Fairbrother, darrenf@stabil.com

CREDIT UNION DEPOSIT GUARANTEE CORPORATION STATISTICS

Alberta

www.cudgc.ab.ca

The Alberta Credit Union Deposit Guarantee Corporation (CUDGC) reviews, advises, and provides assistance to credit unions, ensuring that their business practices are sound. The corporation also monitors credit union performance and will put in place the necessary procedures to reduce risks to the corporation.

- 2000–2005 annual reports are online
- contacted, but no response

British Columbia (*Credit Union Deposit Insurance Corporation*)

www.fic.gov.bc.ca/responsibilities/cudic/overview

British Columbia's Credit Union Deposit Insurance Corporation (CUDIC) has no operating staff; administrative services are provided by the Financial Institutions Commission

(FICOM), the government agency responsible for CUDIC in the province. Expenses incurred for these services are charged back to CUDIC.

FICOM collects data such as membership statistics, assets, liabilities, employees, etc. Credit unions file various types of information on several different timelines. Information relating to balance sheets and income statements are filed on a monthly basis, while that relating to membership statistics and employees is filed quarterly. Other types of data include loan delinquency figures and interest-rate-matching information relating to risk exposures.

FICOM has been collecting this data since it was founded and integrated with CUDIC in 1989. The type of financial information collected by the commission is changing, moving from a compliance “tick-box” method to a risk-based approach to regulation. Its new risk models are currently being designed, but a more fully developed example is used by the Office of the Superintendent of Financial Institutions, and can be viewed at www.osfi-bsif.gc.ca/osfi/index_e.aspx?ArticleID=3.

The financial data mentioned above is not available to the general public. “FICOM collects very sensitive financial information that, if shared, could impair the competitive position of the financial institutions that it regulates.” There is a section in the *Financial Institutions Act* (s. 218) and sections in BC’s *Freedom of Information and Protection of Privacy Act* that allows FICOM to protect this information.

- 2004 financial statements are online
- 2001–05 annual reports are online

Data collection contact: Graham Kennedy, graham.kennedy@gems9.gov.bc.ca

Manitoba

www.cudgc.com

The Manitoba corporation is in charge of monitoring the practices and procedures of credit unions in Manitoba. CUDGC staff inspect and analyse lending practices, financial performance, and operation procedures.

- 2001–2005 annual reports are online
- contacted about data collection procedures, but no response

New Brunswick (*Credit Union Deposit Insurance Corporation*)

www.gnb.ca/0062/NBCUDIC/index-e.asp

Under the *Credit Unions Act*, the New Brunswick Credit Union Stabilization Board Limited and the Office de Stabilisation de la Fédération des Caisses Populaires Acadiennes are responsible for the collection and compilation of statistics related to credit unions. The New Brunswick Credit Union Deposit Insurance Corporation is presently not involved in the collection of data on credit unions.

The Credit Unions Branch of the Department of Justice collects financial as well as other information on credit unions in the province and publishes an annual report, which includes information such as:

- changes in corporate structure over the year, which consists of a list of amalgamations and name changes
- consolidated balance sheet information for the New Brunswick Credit Union Federation Limited and the Fédération des Caisses Populaires Acadiennes
- consolidated balance sheet information for credit unions and caisses populaires in New Brunswick
- 2001–2004 annual reports are online

Data collection contact: Rhéal Caissie, Department of Justice Examinations Branch, phone (506) 457–4852, fax (506) 453–7474

Newfoundland

www.cudgc.nf.net

Information collected on a monthly basis by the Credit Union Deposit Guarantee Corporation of Newfoundland includes the balance sheet; income statements; statement of operating expenses; liquidity report; and a general information report, which includes overdue loans (number and category), membership, and number of full-/part-time employees.

Information collected on a quarterly basis itemizes details of loans included in the “allowance for doubtful loans” and the number of credit union locations.

Information collected annually includes board and committee composition; copies of the audited statement and management letter; copies of the board’s response to each item addressed in the management letter; a copy of the amendments to by-laws to be approved; and minutes denoting approval by the membership.

Data including all credit unions has been collected in this format since 1991. Financial statement information is made available to the public annually in the *Annual Report of the Credit Union Deposit Guarantee Corporation*, which is available free of charge.

- no annual reports online

Data collection contact: Bill Langthorne, billlangthorne@gov.nl.ca

Nova Scotia (*Credit Union Deposit Insurance Corporation*)

www.nscudic.org

- 1996–2005 annual reports are online
- contacted, but no response

Ontario (*Deposit Insurance Corporation of Ontario*)

www.dico.com

- 1997–2005 annual reports are online
- contacted, but no response

Prince Edward Island

www.peicreditunions.com

Credit Union Central of Prince Edward Island is responsible for the province's Credit Union Deposit Insurance Corporation.

- no annual reports online
- contacted, but no response

Québec (*Québec Deposit Insurance Board*)

www.radq.gouv.qc.ca

Most material on this institution is available only in French. In the English section, however, there is some information about the regulatory board, as well as the conditions for registration.

Data, except the statement of guaranteed deposit, is collected electronically. Every year, registered caisses populaires provide the RADQ (Régie de l'assurance-dépôt du Québec) with an annual statement of guaranteed deposits, a detailed return of their operations, and certified financial statements. The RADQ also collects information on the financial position

of institutions, financial risks, bankruptcies, and amalgamation. They do not need to collect data on membership numbers, gender, employees, etc. Some of this information is available on the Desjardins website (www.desjardins.com/fr).

The RADQ and the Inspector General of Financial Institutions (IGIF) signed an agreement allowing the RADQ to request and use any information held by the IGIF, which requires periodical (monthly, quarterly, and annually) disclosure from caisses populaires.

Data collection began in 1972 and similar statistics have been gathered since. Public access to data collected by RADQ/IGIF is free at two sites:

- www.radq.gouv.qc.ca/publications/index_publications.htm
- www.igif.lautorite.qc.ca

In February 2004, both la Régie de l'assurance-dépôt du Québec and the Inspector General of Financial Institutions were replaced by l'Autorité des marchés financiers, which offers the same services as the former RADQ/IGIF.

- 1998–2003 annual reports are online

Data collection contact: Denis Fortin, denis.fortin@radq.gouv.qc.ca, (418) 528–9189

Saskatchewan *www.cudgc.sk.ca*

Like its counterparts in other provinces, the Saskatchewan CUDGC aims to provide credit unions with services that prevent risks to the deposit corporation's fund and additionally, to enhance the self-reliance of Saskatchewan credit unions.

- 2005 annual report is online
- contacted, but no response

PROVINCIAL GOVERNMENT STATISTICS

For a province-by-province listing of data collected on co-operatives, please see Part One, Appendix A (pp. 24–30).

Alberta

Information is collected annually from each co-operative through the submission of annual returns, but changes in information are collected as they occur. The information includes the corporate access number; year-end date; date of incorporation; date of continuance, amalgamation, or registration; full legal name; date of annual meeting; fiscal year-end; number of members; mailing address; address of head office; name of auditor; officers/boards of directors; and resident/nonresident status of board members. A copy of the annual return form can be found at www3.gov.ab.ca/gs/pdf/Forms_Coop/Gs0085in.pdf.

Government Services is also in the process of having all co-operatives incorporated/registered under Alberta's *Co-operative Associations Act* prepare continuance documents to make a transition to the new *Alberta Co-operative Act* that came into effect 1 April 2002. This will update information on board members, officers, and addresses.

Although co-operatives have been reporting annually for many years (no exact date given), the introduction of the new corporate registry system has allowed officials to capture more key information about co-operatives such as type of co-op, members, residency status, etc. Prior to this, they had access to only basic data.

In the future, as co-operatives prepare and submit their annual reports and make application to continue under the new *Act*, officials will be able to provide greater detail, track, compare, and report on the status of co-operatives. Alberta Government Services does

not administer credit unions and rural electricity co-operatives, which are administered through Alberta Finance and Alberta Energy respectively (see contact information below).

Information is collected on co-ops regardless of size on a province-wide basis; it is not possible to break it down by region. Currently, there is only a limited amount of information in the database, which does not capture all the information for co-ops currently incorporated or registered. When available, this information could be made accessible in a generic reporting form to identify the number and type of co-ops and number of members.

Although officials are not able to provide any data at the moment, they do not anticipate charging a fee when and if it does become available. When they are able to produce reports, however, they would want to know the intended use of the information and what group or organization is involved.

Alberta Finance collects financial and nonfinancial information on credit unions in Alberta. Information is collected monthly, quarterly, and ad hoc, depending on the circumstances and types of information. The data goes back well into the past, some as far as fifty years. Generally speaking, registry information is publicly available, although detailed information used for regulatory purposes is not accessible for privacy/competitiveness considerations. Summary information is available; cost is dependent on what data is requested.

The finance department's Rural Utilities Branch (780-427-0125) administers the provisions of the *Rural Utilities Act*, which includes incorporations, amalgamations, and supplemental by-laws of rural utilities associations and co-ops (water, gas, electric), and oversees their business affairs.

- no data online

Contacts: Department of Government Services
government.services@gov.ab.ca

Branches: Information Access, Management and Privacy
3rd Floor, Commerce Place
10155-102 St.
Edmonton, AB, T5J 4L4
Phone (780) 422-2657 / Fax (780) 422-1120
foiphelpdesk@gov.ab.ca

Alberta Finance
Room 425 Terrace Building

9515–107 Street
Edmonton, AB, T5K 2C3
finance.webmaster@gov.ab.ca

Data collection contact (general): Ken Vincent, Director of Co-operatives,
ken.vincent@gov.ab.ca, (780) 422–8227

Credit union data collection contact: James Flett, Deputy Superintendent, Financial
Institutions, Alberta Finance, james.flett@gov.ab.ca, (780) 415–9233

Electricity co-operatives data collection contact: Alberta Energy Public Information Centre,
info.energy@gov.ab.ca, (780) 427–0265

British Columbia

A change in the province's *Co-operatives Act* in 2001 means that co-operatives no longer have to file financial statements or membership statistics. At incorporation, information filed with the registry includes a memorandum of articles, which records the name of the co-op; the number of shares; how the co-op conducts business; notice of registered office address; and list of directors. The registry does not have any statistics on employees.

After incorporation, subsequent changes are submitted to the registry. As well, co-operatives are obliged to file an annual report, which requires a minimal amount of information — year-end; the date of the last AGM; notice of directors; and a list of directors.

This information is updated annually, but it is not clear how long it has been collected. Data is gathered on all co-operatives in the province and everything is public record. Until the *Act* was changed, the superintendent of co-operatives required co-ops to file different data, and some of this was not accessible to the public — membership records, for example. Costs are \$10 to do a search, \$.50 for a photocopy.

- no data online

Contact: Ministry of Finance
Societies and Co-operatives Registry
Box 9431, Stn Prov Gov't
Victoria, BC, V8W 9V3
Phone (250) 356–6977 / Fax (250) 356–9422

Data collection contact: Val Proctor (250) 356–7711

Manitoba

The Financial Institutions Regulation Branch of the Department of Finance is responsible for registering all co-operatives, credit unions, and trust and loan companies in Manitoba, regardless of size and/or status. Co-operatives are required to file an annual return, which provides information on their status from 1 January to 31 December of each year. Information in the annual return includes the registered name of the co-op along with the registered office address, date of incorporation, list of directors, officers, members, etc.

Data has been collected on co-operatives since the late 1800s or early 1900s, although the information collected at that time was not as comprehensive as that gathered now.

Basic information is accessible to the public, including the Articles of Incorporation, any amendments, and the annual return of information. Because the branch only registers co-operatives provincially, no national-level information would be available. There is a cost involved, based on what information is required.

- no data online

Contacts: Department of Finance
Consumer and Corporate Affairs
Division of Manitoba Finance
Financial Institutions Regulation Branch
Inquiries Credit Unions, Caisses Populaires and Co-operatives
1115–405 Broadway
Winnipeg, MB, R3C 3L6
Phone (204) 945–4466 / Fax (204) 948–2268
coop-cu@gov.mb.ca

Department of Finance Ministers
Minister: Honourable Gregory Selinger, (204) 945–3952
Deputy Minister: J. Patrick Gannon, (204) 945–3754

Data collection contact: Pat Anderson, Financial Institutions Regulation,
paanderson@gov.mb.ca, (204) 945–4466

New Brunswick

The Registrar of Co-operatives has a database that holds the following information: the legal name of the co-operative; the sector in which it operates; active/inactive status; address,

other contact information; year of incorporation; year of dissolution; year of amalgamation; year of revival; current directors; number of full- and part-time employees; number of members; financial statements; date of annual meeting; number of members attending; name of the current auditor; and the name of the current manager. For housing co-operatives, the number of units is recorded.

Although the database is not available online, the public can call or write the registry for information. Registry personnel are able to accommodate certain requests depending on their ability to manipulate the data. They also publish an annual report on co-operatives in the province that lists registered, active, new, and dissolved co-ops for the year.

Co-operatives in New Brunswick are legally obligated to provide the registry with an annual report and financial statements; these documents are the primary sources for their database. The data is input as received. The database only accumulates, historically, the financial statements, the number of members, the number of employees, the annual meeting date, and the number attending.

If co-operatives do not file with the registry, they are considered inactive after five years. The registrar has the authority to dissolve inactive co-operatives, but she has not done so in the recent past.

Financial data collected by the registrar is only made public on a consolidated basis per category of co-operative, unless there is a way to hide the co-operative's identity. The registry also does not give out personal information about the directors.

The database has information on incorporations beginning in 1938, when legislation first came into effect. For earlier years, the registrar has only the legal name, incorporation date, and dissolution date, unless the co-operatives are still in existence. In this case, they have all of the information commented on above.

Starting in 1985, when the registry was first computerized, information in the database contained all the above details except information on the directors, managers, and auditors; these categories have only been collected since 1998. In the 1980s, information was collected on share capital amounts and corporate income tax, but these fields were dropped in the 1990s.

Older hand-kept registries are not available, but filed annual reporting forms and financial statements are archived.

The co-operative registry database has information on every sector except financial co-operatives in the province. Financial data on credit unions and caisses populaires is computerized separately and not accessible by the public. The registry also has a basic mailing list for financial co-operatives. The provincial stabilization board compiles other information such as the number of members and the number of employees. They archive filed annual reporting forms, which are accessible by the public. They also publish an annual report on credit unions and caisses populaires with consolidated financial statements and other information.

There is no cost for the information mentioned above.

- no data online

Contact: Department of Justice
Credit Unions, Co-operatives and Trust Companies Branch
Kings Place
Box 6000
Fredericton, NB, E3B 5H1
Phone (506) 453-2315 / Fax (503) 453-7474
Director: John White, john.white@gnb.ca
Phone (506) 453-6543 / Fax (506) 453-7483

Data collection contact: Claire Gagnon, Registrar of Co-operatives, claire.gagnon@gnb.ca,
(506) 444-4826

Newfoundland and Labrador

Information collected by the Registry of Co-operative Services consists of audited/non-audited financial statements; minutes of AGMs; notices of changes of directors; and annual return forms (data includes the fiscal year ended; registered name and office address; registration number; incorporation date; financial year-end; type of co-operative; change of directors; date of last annual meeting; number of officers; directors; members or employees who are bonded; amount, insurer; date of expiry; name of auditor; name of manager; total number of members; and number of full- and part-time employees).

Data is gathered annually except notice of change of directors, which may be collected at any time during the year. This data has been collected since 1937, and data types have been similar since the 1970s. The data applies to all co-operative types except financial co-ops (credit unions/caisses populaires), as these are the responsibility of the CUDGC.

The data collected by the registry has not been compiled into usable material for several years, and the director of Commercial Registrations intends to seek legislative changes to reduce the amount of data required for filing. This information is therefore not generally available to the public due to a lack of time and personnel to compile it. The current legislation provides only for the examination of documents on an individual file basis at \$10 per file.

- no data online

Contact: Department of Government Services and Lands
Commercial Registrations Division
Registry of Co-operative Services
Box 8700
St John's, NFLD, A1B 4J6
Phone (709) 729-2582 / Fax (709) 729-0232

Data collection contact: John Perry, Co-operative Examiner, perryj@gov.nl.ca

Northwest Territories

Within ninety days after the end of the fiscal year, an association must send a general statement on the affairs of the business in a standard form and including the details required by the supervisor of co-ops. Co-ops must also send a copy of the certified financial statement for the preceding fiscal year and details of any amendments to corporate registries.

Data collection is updated annually on every co-operative in the province, although some information is collected on an ongoing basis. Information has been gathered since 1988, when the *Act* came into being.

Co-operative association documents filed with Corporate Registries are available for inspection by the general public during regular office hours. There is no cost to view documents, but they charge \$1 per page for photocopies, \$2 for faxes.

- no data online

Contact: Doug Doan
Supervisor of Co-operatives for the Northwest Territories
Resources, Wildlife and Economic Development
Government of the Northwest Territories
P.O. Box 1320
Yellowknife, NT, X1A 2L9
Phone (867) 873-7381 / Fax (867) 873-0434
doug_doan@gov.nt.ca

Data collection contacts: Damien Healy, Policy, Legislation and Communications,
damien_healy@gov.nt.ca; Judy McLinton, Communications Planning Specialist,
judy_mclinton@gov.nt.ca, (867) 873-7379

Nova Scotia

The Co-operatives Branch asks co-ops to submit an annual report that includes the following information: street address; mailing address; officers (president, vice-president, treasurer, secretary, and other officers); number of directors; whether or not all board positions are filled; if an AGM was held in the last twelve months; if there was a quorum at the AGM; if the financial audit (which is also provided to NS government) was approved by members at the AGM; number of full-/part-time employees; how many board meetings occurred during the last fiscal year; number of members; and how many members attended at least one educational event over the past year.

Basic information has been collected since 1936. The data is presented much like Co-operatives Secretariat publications; cost depends on what is requested.

The Co-operatives Branch produces a detailed annual report that combines data from all reporting co-ops. It has both financial and demographic data, including current-year operating results summary by type and sub-type; 64-year operating results summary by type and sub-type; distribution by type and county; employees and membership by type and county; and details of new incorporations as well as dissolutions.

- 2003-2004 annual reports are online

Contact: Service Nova Scotia and Municipal Relations
Co-operatives Branch
Box 2734
Halifax, NS, B3J 3P7
Phone (902) 424-5200

Online enquiry form: www.gov.ns.ca/snsmr/

Data collection contact: Ronald J. Skibbens, Inspector of Co-operatives,
skibbenr@gov.ns.ca, (902) 893-6190

Nunavut

The Department of Justice requires that each co-operative provide an annual return that gives information on the current membership of the board and current financial statements. The information is updated regularly with an annual reminder.

Data has been collected by the Government of Nunavut since 1 April 1999. Before this, it was collected by the Government of the Northwest Territories. The same data is collected from year to year, for every co-operative, including financial co-ops. The department has never had a request for data, but it does provide information on whether or not the co-operative is in good standing (i.e., has an up-to-date annual return on file). There is no cost for this information.

- no data online

Contact: Department of Sustainable Development
P.O. Box 2410
Iqaluit, NU, X0A 0H0

Department of Justice
Nunavut Legal Registries
Phone (867) 975-6190 / Fax (867) 975-6194

Data collection contact: Ed McKenna, Supervisor of Co-operatives in Nunavut under the *Co-operatives Act*, emckenna@gov.nu.ca, (867) 975-5921

Ontario

The Financial Services Commission of Ontario (FSCO) does not collect data on co-ops in the province. It has records of the Certificates of Incorporation issued for new co-operatives (which provides the date, name, address, and the number of directors). The records can be purchased for \$35 dollars, but would not be accurate because FSCO is not often notified of changes. The Ontario Co-operative Association (www.ontario.coop) is likely to have information on their member co-ops.

- no data online
- contacted, but no response

Contact: Financial Services Commission of Ontario
5160 Yonge Street
Box 85
North York, ON, M2N 6L9
Phone (416) 250-7250 / Fax (416) 590-7070

Feedback form on website: [www.fSCO.gov.on.ca/corporateoperations/oicwebfe.nsf/
WebFeedback?OpenForm](http://www.fSCO.gov.on.ca/corporateoperations/oicwebfe.nsf/WebFeedback?OpenForm)

Data collection contact: Chuck Andrews, Senior Manager, Examinations,
candrews@fSCO.gov.on.ca

Prince Edward Island

- no data online
- contacted, but no response

Contact: Attorney General's Office
Consumer, Corporate and Insurance Services Division
Corporations and Securities
4th Floor, Shaw Building
95 Rochford Street
Box 2000
Charlottetown, PEI, C1A 7N8
Director: Edison Shea, ejshea@gov.pe.ca
Phone (902) 368-4551 / Fax (902) 368-5283

Québec

The Ministère du développement économique et régional, direction des coopératives, has a database that is updated annually, and every nonfinancial co-operative is obliged to file an annual report with the department. Information collected includes contact information; the administrative region in which the co-operative is located; the date of constitution; year-end date; balance sheet information (assets and liabilities); depreciation; net interest charges; subsidies; the number of employees (not broken down into full and part time); the number of members; and the proportion of business done with members. Also included is whether or

not the co-operative is a member of a federation or a regional development co-operative; the number of co-operatives within each sector (excluding financial); the number of active co-operatives; the number of dissolutions by order of the minister; and the number of voluntary liquidations and dissolutions.

Information has been collected for some time but is available in the database only up to 1980; the format of data collection described above has been used since 2000. Data availability depends on what is needed, it must be at an aggregate level (firm-level data would not be given), and there is no cost. They would want to know the use of the data, and translations would be necessary.

Online publications/resources (information provided is in French only):

Inspecteur général des institutions financières

- name, date of formation/merger, affiliation, and addresses of caisses populaires in Québec
- website: www.lautorite.qc.ca/bulletin-publications/publication-institutions-financieres.fr.html

Annual Report on Caisses Populaires in Québec

- number of affiliated/nonaffiliated (with Desjardins) caisses populaires, by region, in Québec; name changes and mergers within the year; bankruptcies; financial information (debts and assets, revenues, membership); institutions within regions — financial information is broken down
- website: www.igif.lautorite.qc.ca/publications/publications_archivees/index_publications_archivees.htm

Coopératives du Québec, Données statistiques 2005

- comparative statistics 1996–2005; co-operatives by sector; members; employees; turnover; co-op types by region of Québec; number of co-ops within each sector; financial information on co-ops by type, region (broken down by type), by industry, by sector of activity (e.g., agricultural, clubs, stores)
- website: www.mdeie.gouv.qc.ca/page/web/portail/ministere/service.prt?svcid=PUBLICATIONS1&page=details_publication.jsp&iddoc=43409

Commerce électronique dans les coopératives agricoles (2000)

- provides some charts and tables on Internet use by agricultural co-operatives in Québec; in French only

- website: www.mdeie.gouv.qc.ca/page/web/portail/ministere/nav/Publications.html?&page=details_publication.jsp&iddoc=43509

Taux de survie des entreprises coopératives au Québec (1999)

- survival rates of co-operatives in Québec
- in French only; but the Co-operatives Secretariat has an English version (printed in 2000) of this publication online: www.agr.gc.ca/policy/coop/pdf/Survival.pdf
- website: www.mdeie.gouv.qc.ca/page/web/portail/ministere/service.prt?svcid=PUBLICATIONS1&page=details_publication.jsp&iddoc=43407

This publication makes use of administrative and financial data from the Co-operatives Branch, which in turn came from annual reports filed with the branch. The information was compared to private-sector compilations of the same types of data. This data was borrowed from Statistics Canada and the Institut de recherche sur les PME, the University of Québec's small business research institute at Trois Rivières.

The study was done for nonfinancial co-operatives, excluding the housing sector. Survival rates were calculated over periods of five and ten years. Researchers analysed nine five-year periods — 1984–89, 1985–90, 1986–91, and so on up to 1992–97 — as well as four ten-year periods — 1984–94, 1985–95, etc. Co-operatives that were formed and sent in an annual report during the starting year of the time frame were analysed in that period only.

Some of the tables provided in the publication include:

- breakdown of survival rates for co-ops (by type and by sector in Québec): after five years, ten years, and a general survival rate (which was calculated by examining co-operatives in operation in 1998 that had been created between the years 1960 and 1995)
- change in the number of co-operatives incorporated between 1960 and 1995, and surviving co-ops in 1998
- co-operatives incorporated between 1960 and 1995, and the number of surviving co-operatives in 1998
- comparison between the number of consumer co-operatives incorporated between 1960 and 1995 and the number surviving in 1998
- compilation of co-operative survival rates over nine five-year periods from 1984–1997, broken down by type of co-op and by sector, the number of co-ops established, the number surviving after five years, and the survival rate (%)
- compilation of co-operative survival rates over four ten-year periods from 1984–1997; broken down by the type of co-operative and by sector, the number of co-operatives established, the number surviving after five years, and the survival rate (%)

- compilation of the general survival rate (long term) of co-operatives, 1960–95; broken down by the type of co-op and by sector, the number of co-operatives established, the number surviving after five years, and the survival rate (%)

Contact: Ministère des Finances, de l'Économie et de la Recherche
Direction des Coopératives
710 place D'Youville, 7^e étage
Québec, QC, G1R 4Y4
info@mic.gouv.qc.ca

Data collection contact: Andre Mercier, andre.mercier@mder.gouv.qc.ca, (418) 691-5698

Saskatchewan

Every co-operative in the province must file an annual return with the Corporations Branch of the Department of Justice, which collects information on the name of the firm and mailing address; legal name; nature of business and NAIC code; fiscal year-end; date of the annual meeting; number of members; number of full- and part-time employees; and a listing of directors and officers. Other types of information collected include articles of amendment, incorporation, amalgamation, continuance, reorganization, arrangement, and revival; power of attorney; and application to restore name to register forms. More information related to data collected by the branch can be found at

www.qp.gov.sk.ca/documents/English/Regulations/Regulations/C37-3R1.pdf.

Within thirty days of the annual meeting, co-operatives must provide the registrar with a copy of the financial statement placed before its members at the meeting. This does not apply to extra-provincial co-operatives, whose by-laws provide that earnings may be distributed to members, or a co-op that is registered pursuant to the *Co-operatives Act* solely for the purpose of becoming a member of the Co-operative Superannuation Society.

Although data is collected annually, some information must be filed with the registrar within fifteen days of change, such as a change in the registered office, or within thirty days, such as a change in directors. There has been co-operative legislation in Saskatchewan since 1913, and it is quite likely that information has been collected on co-operatives since that time.

Every co-operative (except credit unions, which report to the Registrar of Credit Unions) has to file an annual return, but only some co-operatives have to file financial statements as well. The public can view a co-op's articles; by-laws; amendments to articles and by-laws; certificates issued to it by the registrar; the list of directors; address of its registered office; its attorney for service; and, for those co-ops required by the *Act* to file financial statements with the registrar, the financial statements.

There are costs involved in accessing data. The registrar can provide a report containing the names of co-operatives by location, by type of activity, or both. The report will cost a minimum of \$200.00. Other types of information can be requested; fees are listed in the pdf file mentioned above.

- no data online

Contacts: Saskatchewan Industry and Resources

Rural Development

Wayne Thrasher, wthrasher@ir.gov.sk.ca

4th Floor, 2103–11th Ave.

Regina, SK, S4P 3V7

Phone (306) 787–0190, 787–8477, 787–2232 / Fax (306) 787–2159

Saskatchewan Department of Justice

Corporations Branch

2nd Floor, 1871 Smith Street

Regina, SK S4P 3V7

Phone (306) 787–2962 / Fax (306) 787–8999

corporations@justice.gov.sk.ca

Data collection contact: Monte Curle, Deputy Director, Corporations Branch,
Saskatchewan Justice, mcurle@justice.gov.sk.ca, (306) 787–5704

Yukon

Yukon Territory has only one co-operative left. To remain in good standing, this co-operative is required to file annual financial statements and a list of directors with the Department of Corporate Affairs.

- no data online

Contact: Corporate Affairs

Community Services, Government of Yukon

Box 2703, C-6
Whitehorse, YK, Y1A 2C6
Phone (867) 667-5225 / Fax (867) 393-6251

Data collection contact: Richard Roberts, Registrar of Co-operatives,
richard.roberts@gov.yk.ca

GOVERNMENT OF CANADA STATISTICS

Canada Customs and Revenue Agency

www.ccr-aadrc.gc.ca

Co-operatives can file either as corporations or as nonprofit organizations, since for income tax purposes, the co-operative model is not recognized as a legal form of ownership. Recognized forms include only proprietorship, partnership, or corporate, so when co-operatives file their income tax statements, they file as either partnerships or corporations. Based on this information, the Canada Customs and Revenue Agency is not able to identify import/export statistics for co-operatives.

Data collection contact: Jerry Shoemaker, Communications Manager, jerry.shoemaker@ccra-aadrc.gc.ca, (306) 975-4603

Co-operatives Secretariat

www.agr.gc.ca/policy/coop

Co-operation in Canada/Co-operatives in Canada (1941-2001 data) provides a statistical overview of the nonfinancial co-operative sector in Canada. Data for the years 1995-1999 are available online; publications for the other years noted are available from the University of Saskatchewan Library or the Centre for the Study of Co-operatives Library, U of S. For a year-by-year comparison of the types of data reviewed in these publications, please see the Excel spreadsheet coopsec2.xls (available only in electronic format from the Centre for the Study of Co-operatives website at www.usaskstudies.coop/publications/electronic_format/).

Collection information from the 2001 edition of *Co-operatives in Canada* notes that data on co-operatives in Canada is presented by group. Nonfinancial co-operatives are broken down by who comprises the membership (i.e., producers, consumers, workers). Credit unions and caisses populaires are looked at separately, even if their membership is made up of consumers.

Because it is not possible to collect information on 100 percent of the nonfinancial co-operatives, estimates are used for nonreporting co-ops deemed to be still active, although it should be noted that estimates were made only for those co-ops for which data were collected within the past five years.

In “A Socio-Economic Profile of Aboriginal Co-operatives in Canada,” (www.agr.gc.ca/policy/coop/pdf/abor_fin.pdf), researcher Bachir Belhadji notes that only co-operatives incorporated as such are considered to be co-ops by the Co-operatives Secretariat. Entities organized like co-operatives but not incorporated as such are not asked to provide data to the secretariat, which generally uses an annual questionnaire for data-collecting purposes. The questionnaire has three basic parts:

1. Information about sales and services; the classification of sales refers to several predefined categories such as fish, grain, food products, eggs, etc.
2. Statement of Income: revenues and expenses
3. Balance sheet: assets and liabilities

The questionnaire also captures nonfinancial variables such as the status of membership — active and total — and employees, full and part time.

With respect to time-series data on the co-op sector in Canada, while some basic comparisons would be possible, such as overall co-operative businesses numbers, it would be difficult to get long time-range comparability from data in the *Co-operation in Canada/Co-operatives in Canada* publications. Clearly, as departments responsible for co-operatives change, and the persons responsible for data collection change, the information considered to be most important will change as well. Overall, there is currently more specific information in the types of data collected. This is largely because of the change in regional comparison. From 1978–1992, data was presented in regional format (e.g., West, Ontario, Québec, Atlantic) rather than by individual provinces. In addition, for a significant span of time

(1953–93), wholesale statistics were removed from the overall tabulation of co-operative data and presented in separate tables.

Co-operatives Secretariat statistician Les McCagg provided the author with data for the years 1984–1992 aggregated at the provincial level, and while some comparisons could be made across a larger time frame, they would be minimal. Some of the information he sent is more detailed than what is in the publication. Because of the way the data are entered into the database, the new printouts present data based on the categories in later versions of *Co-operatives in Canada*. The new printouts contain employee statistics, for example, while the printed publications from the same year do not. The Co-operatives Secretariat was able to add this information by going back and estimating the numbers. Nonetheless, this makes the transition from the 1992 new printouts to the 1993 publication substantially less smooth, because the move is from tables with more specification to tables with less specification.

Another issue with respect to the correctness of the data is the fact that the secretariat entered information in the database that it received after it published *Co-operatives in Canada* for that year. Add to this the fact that the wholesale data was re-entered into the overall summary of the co-op sector and you get totals figures in the printouts that are significantly different from the data in the publication. If this data were to be used in the future, it would be advisable to have the Co-operatives Secretariat print out updated tables for the years 1993–2002. Along with data accuracy, these printouts would enable easier comparisons between the years 1984 (the earliest year for statistics in the database) and 2002, because the categories are more standardized.

To be more specific, there were a number of time frames in which significant changes were made to data:

- 1953 — separate category for co-op wholesales
- 1963 — changes in financial reports collection
- 1978 — more specific categories made for financial data; change to regional data aggregation from provincial tallies
- 1984 — revision of statistics, breaking down into more specific types of co-operatives
- 1993 — began reporting again by province; co-op wholesale data removed as separate category and added again into main tables tabulations

Overall, there is more specification over the years in terms of the data collected.

Type of co-operative, the products marketed/sold, and some of financial information, for example, were increasingly presented in greater detail. It also appears as though the focus of data collection became slightly more targeted towards the financial aspects. Earlier publications, for instance, provided estimates of the percentages of co-ops reporting, the percentages of transactions with the membership, and the number of business locations, as opposed to reporting only on the number of co-operative associations.

Despite its shortcomings, the *Co-operatives in Canada* publications are the only attempt to systematically collect data on the (nonfinancial) co-operative sector in Canada. The difficulties in gathering this type of data are immense. According to McCagg, the biggest hurdle to gathering statistics on the co-op sector in Canada is the lack of legislation requiring this type of activity by law. Because co-operatives are legislated at the provincial rather than the federal level (with the exception of co-ops incorporated federally in order to conduct business in more than one province), federal institutions such as the Co-operatives Secretariat essentially have no clout to force co-operatives to provide this data.

In addition to this, co-operatives are not always willing to share their information with the secretariat. McCagg sends out approximately 6,000 questionnaires for the *Co-operatives in Canada* publication and receives back only about 2,500. The second mailout, two months later, consists of approximately 3,500 surveys. A third mailout, two months after that, consists of about 1,800 surveys. For those co-operatives that he knows are still active but have not sent in data, he uses estimates garnered from previous filings.

Lack of standardization in data collection across the provinces adds to the difficulty of gathering statistics at the national level. While some provinces are willing to share data with the secretariat, such as Saskatchewan, others, such as Ontario, are not collecting data at all. Using the various strategies described above, McCagg estimates that he captures approximately 90 percent of the co-operative sector.

As noted, Bachir Belhadji has compiled a national statistical study on Aboriginal co-operatives, "A Socio-Economic Profile of Aboriginal Co-operatives in Canada," as part of a larger work on the subject. The co-operatives under review were selected on the basis of the Co-operatives Secretariat's prior knowledge of their existence, and the list was then sent

to respective provincial authorities for verification. The data came from the secretariat's database, collected from its annual survey of nonfinancial co-operatives.

The publication provides comparisons between northern and southern Aboriginal co-operatives, sectoral distributions, and a statistical profile of the average Aboriginal co-operative, among other statistical manipulations.

Particularly interesting was Belhadji's suggested improvements to data collection for Aboriginal co-operatives, many of which could be adapted to national data gathering. He suggested more detailed collection on social variables, such as youth, gender, and the ethnic origin of workers. Other ideas included more information on managers and employees, markets, the use of technology, and levels of government support.¹

Data collection contact: Les McCagg, Database Manager/Statistician, Co-operatives Secretariat, mccaggl@agr.gc.ca, (613) 759-7198

Historical Statistics of Canada

www.statcan.ca:8096/bsolc/english/bsolc?catno=11-516-X&CHROPG=1

Catalogue Number: 11-516-XIE

M506-522. *Co-operatives in Canada, 1934 to 1975*

Source: collected by the Marketing and Trade Division of the Canada Department of Agriculture; mail survey starting in the 1934 co-operative fiscal year.

J369-384. *Central Credit Unions, 1967 to 1976*

Source: Statistics Canada, Financial Institutions, (Catalogue 61-006); Business Finance Division, Statistics Canada.

The introduction to the above publication provides complete notes on definitions, sources, and methods. These are a new series beginning in 1961. The older data, from 1914 to 1959, are in series H503-648 in the first edition of this volume. Classifications used in the older series are quite different from those in use now.

1. Lou Hammond Ketilson and Ian MacPherson, *A Report on Aboriginal Co-operatives in Canada: Current Situation and Potential for Growth* (Saskatoon: Centre for the Study of Co-operatives, 2001).

Office of the Superintendent of Financial Institutions

The Office of the Superintendent of Financial Institutions (OSFI) is responsible for regulating financial institutions in Canada, including co-operative credit associations. More specifically, the OSFI regulates the seven provincial credit union centrals, via regulatory returns filed with the OSFI. The only data available for public use is that which is posted on the website; it is financial in nature. There are no membership or employee statistics available. Online publications include:

Annual Summaries of Assets, Liabilities, Incomes, and Expenditures (1999–2004)

- credit union centrals
- liabilities and members equity
- statements of income and expenses
- website: www.osfi-bsif.gc.ca/osfi/index_e.aspx?ArticleID=602

Co-operative Credit Associations Year-End Data

- downloadable, zip-compressed, self-extracting Excel files
- the data available in these files includes assets, members equity, liabilities, and a statement of income and expenses
- website: www.osfi-bsif.gc.ca/osfi/index_e.aspx?ArticleID=602

Contact: 255 Albert Street
Ottawa, ON, K1A 0H2
(613) 990-7788
(613) 990-5591
1-800-385-8647
enquiry form online

Statistics Canada

www.statcan.gc.ca

Statistics Canada does not collect information on the co-operative sector in Canada. According to Nadia Danyliuk (nadia.danyliuk@statcan.ca), when Statistics Canada collects data on businesses, they are classified according to their particular industry, rather than being classified as a co-operative.

Credit unions and caisses populaires are the only co-operative sector to have their own NAIC (North American Industrial Classification) industry classification. Because these

institutions are much more closely regulated than other co-operative sectors and also have their own NAIC code (52213/522130) means that Statistics Canada does indeed have statistics available for them.

Unfortunately, Statistics Canada's publicly available data on credit unions are limited primarily to aggregate figures at the national level and largely financial in nature. Although the researcher contacted a Statistics Canada spokesperson to see if it was possible to manipulate this data to provide different outputs (e.g., by province), she received no follow-up call with the information.

Another note with respect to this data collection: Statistics Canada, not the Department of Foreign Affairs and International Trade, is the agency responsible for collecting import/export trade statistics. Import/export flows for co-operative businesses are thus not being collected at the federal level. For this information it is best to speak to individual co-operatives themselves.

The tables (and vectors) listed below are available through CANSIM II, Statistics Canada's online database for Canadian socio-economic statistics. Information related to the data sources was taken from the Statistics Canada website.

CANSIM II Search — Tables

Data Source: Average Fair Market Value/Purchase Price for New Homes in Canada — new data from the GST File (Survey ID 1141)

This is an active survey. The last data release was in December 2002, with 1996–2000 data. Data is available from 1982. The report contains information from the GST/HST New Housing Rebate File, including average fair-market value; average rebate; total value of rebates; and total value of housing sales. Annual breakdowns are available by province, Census Metropolitan Areas/Census Agglomerations (CMA/CA), and component Census Subdivisions (CSDs) of each CMA/CA.

Administrative data sources are used for this survey from the Canada Customs and Revenue Agency, which administers the GST/HST. Data for the survey can be found online at www.statcan.ca/cgi-bin/imdb/p2SV.pl?Function=getSurvey&SDDS=1141&lang=en&db=IMDB&dbg=f&adm=8&dis=2.

CANSIM II Table 330002: Goods and Services Tax (GST) and Harmonized Sales Tax (HST) Average Fair Market Value, by Type of Builder

Available Vectors

NUNAVUT; COOPERATIVE LIVING [V13947425]
 DOLLARS; CANADA; COOPERATIVE LIVING [V740826]
 DOLLARS; NEWFOUNDLAND; COOPERATIVE LIVING [V740827]
 DOLLARS; BRITISH COLUMBIA; COOPERATIVE LIVING [V740828]
 DOLLARS; YUKON; COOPERATIVE LIVING [V740829]
 DOLLARS; NORTHWEST TERRITORIES; COOPERATIVE LIVING [V740830]
 DOLLARS; PRINCE EDWARD ISLAND; COOPERATIVE LIVING [V740831]
 DOLLARS; NOVA SCOTIA; COOPERATIVE LIVING [V740832]
 DOLLARS; NEW BRUNSWICK; COOPERATIVE LIVING [V740833]
 DOLLARS; QUEBEC; COOPERATIVE LIVING [V740834]
 DOLLARS; ONTARIO; COOPERATIVE LIVING [V740835]
 DOLLARS; MANITOBA; COOPERATIVE LIVING [V740836]
 DOLLARS; SASKATCHEWAN; COOPERATIVE LIVING [V740837]
 DOLLARS; ALBERTA; COOPERATIVE LIVING [V740838]

Data Source: Bank of Canada

This is non-Statistics Canada information. Please refer to contact information below.

Mary McGrath
 Bank of Canada
 234 Wellington Street
 Ottawa, ON, K1A 0G9
 Phone: (613) 782-8531
 mmcgrath@bank-banque-canada.ca

- contacted, but no response

CANSIM II Table 1760020: Currency outside Banks and Chartered Bank Deposits, Monthly Average, 1968-2003

CANSIM II Table 1760023: Selected Credit Measures, Monthly Average or Average of Month-Ends, Unadjusted Unless Otherwise Noted, 1969-2003

Available Vector

DOLLARS; CANADA; NONRESIDENTIAL MORTGAGES, CREDIT UNIONS AND CAISSES POPULAIRES [V122658]

CANSIM II Table 1760025: Chartered Bank Assets and Liabilities and Monetary Aggregates, Monthly Average, Seasonally Adjusted

Available Vectors

DOLLARS; CANADA; M2+ DEPOSITS AT TRUST AND MORTGAGE LOAN COMPANIES,
CAISSES POPULAIRES AND CREDIT UNIONS [V37131]

DOLLARS; CANADA; TOTAL, DEPOSITS AT CREDIT UNIONS AND CAISSES POPULAIRES
[V37139]

CANSIM II Table 1760026: Local Credit Unions and Caisses Populaires: Quarterly Statement of Estimated
Assets and Liabilities, End of Period, 1967–2002

Available Vectors

DOLLARS; CANADA; TOTAL, ASSETS [V122571]

DOLLARS; CANADA; CASH AND DEMAND AND NOTICE DEPOSITS, IN CENTRALS [V122572]

DOLLARS; CANADA; SHARES IN CENTRAL CREDIT UNIONS [V122573]

DOLLARS; CANADA; OTHER INVESTMENTS [V122574]

DOLLARS; CANADA; PERSONAL LOANS [V122575]

DOLLARS; CANADA; OTHER LOANS [V122576]

DOLLARS; CANADA; RESIDENTIAL MORTGAGES [V122577]

DOLLARS; CANADA; NONRESIDENTIAL MORTGAGES [V122578]

DOLLARS; CANADA; OTHER ASSETS [V122579]

DOLLARS; CANADA; CASH AND DEMAND AND NOTICE DEPOSITS, OTHER [V122580]

DOLLARS; CANADA; TERM DEPOSITS [V122581]

DOLLARS; CANADA; GOVERNMENT OF CANADA TREASURY BILLS [V122582]

DOLLARS; CANADA; OTHER SHORT-TERM PAPER AND BANKERS' ACCEPTANCES [V122583]

DOLLARS; CANADA; GOVERNMENT OF CANADA BONDS [V122584]

DOLLARS; CANADA; PROVINCIAL BONDS [V122585]

DOLLARS; CANADA; MUNICIPAL BONDS [V122586]

DOLLARS; CANADA; OTHER BONDS AND DEBENTURES [V122587]

DOLLARS; CANADA; TOTAL, LIABILITIES [V122588]

DOLLARS; CANADA; LOANS PAYABLE [V122589]

DOLLARS; CANADA; TOTAL, DEPOSITS [V122590]

DOLLARS; CANADA; CHEQUABLE DEPOSITS [V122591]

DOLLARS; CANADA; NONCHEQUABLE DEPOSITS [V122592]

DOLLARS; CANADA; TERM DEPOSITS [V122593]

DOLLARS; CANADA; OTHER LIABILITIES [V122594]

DOLLARS; CANADA; MEMBERS' EQUITY, SHARE CAPITAL [V122595]

DOLLARS; CANADA; MEMBERS' EQUITY, OTHER [V122596]

DOLLARS; CANADA; DEPOSITS, OF WHICH: TAX-EXEMPT [V122597]

CANSIM II Table 1760027: Consumer Credit, Outstanding Balances of Selected Holders, 1956–2003

Available Vectors

DOLLARS; CANADA; AT MONTH-END; UNADJUSTED; CREDIT UNIONS AND CAISSES POPU-
LAIRES [V122686]

DOLLARS; CANADA; AT MONTH-END; SEASONALLY ADJUSTED; CREDIT UNIONS AND CAISSES POPULAIRES [V122695]

DOLLARS; CANADA; AVERAGE AT MONTH-END; UNADJUSTED; CREDIT UNIONS AND CAISSES POPULAIRES [V122704]

DOLLARS; CANADA; AVERAGE AT MONTH-END; SEASONALLY ADJUSTED; CREDIT UNIONS AND CAISSES POPULAIRES [V122713]

CANSIM II Table 1760069: Residential Mortgage Credit, Outstanding Balances of Major Private Institutional Lenders, 1969–2003

Available Vectors

DOLLARS; CANADA; AT MONTH-END; UNADJUSTED; CREDIT UNIONS AND CAISSES POPULAIRES [V122722]

DOLLARS; CANADA; AT MONTH-END; SEASONALLY ADJUSTED; CREDIT UNIONS AND CAISSES POPULAIRES [V122732]

DOLLARS; CANADA; AVERAGE AT MONTH-END; UNADJUSTED; CREDIT UNIONS AND CAISSES POPULAIRES [V122742]

DOLLARS; CANADA; AVERAGE AT MONTH-END; SEASONALLY ADJUSTED; CREDIT UNIONS AND CAISSES POPULAIRES [V122752]

Data Source: Quarterly Survey of Financial Institutions (ID 2504)

This was amalgamated with another survey, the Quarterly Survey of Financial Statistics for Enterprises (ID 2501), in 1993, and consequently presents information from 1972–1993.

This is a voluntary survey that collects quarterly financial information about the finance and insurance sectors, consisting of financial institutions, financial intermediaries, and other investment funds operating in Canada. Financial statistics focus on balance sheet and statement of income, retained earnings, and changes in financial position.

In most cases, Statistics Canada surveys financial intermediaries directly through questionnaires designed specifically for each type of intermediary. The Financial Institutions Section of Statistics Canada surveys the following quarterly on a census basis: chartered banks; trust companies; mortgage loan companies; investment funds; central credit unions; trust companies' retirement savings funds; financial leasing corporations; and investment dealers. Local credit unions are surveyed quarterly by a central organization within each province. While some provinces conduct a census, others may undertake a sample survey. In any case, a provincial census is carried out each year. In the remaining industries, the financial intermediaries are stratified by industry, and within each industry, by asset size.

All intermediaries above a minimum size are included in the survey; intermediaries below this size are surveyed on a sample basis. The published universe data for insurance carriers and segregated funds are derived from annual data collected by the federal and provincial departments of insurance, while those for financial corporations and business financing corporations are gleaned from annual corporate income tax data submitted to Revenue Canada – Taxation.

CANSIM II Table 1850015: Local Credit Unions Statements of Estimated Assets, Liabilities, and Members' Equities, 1970–1990

Available Vectors

DOLLARS; CANADA; TOTAL ASSETS [V207873]
DOLLARS; CANADA; CASH AND DEMAND DEPOSITS [V207874]
DOLLARS; CANADA; ON HAND [V207875]
DOLLARS; CANADA; DEMAND DEPOSITS [V207876]
DOLLARS; CANADA; CENTRALS [V207877]
DOLLARS; CANADA; CHARTERED BANKS [V207878]
DOLLARS; CANADA; TRUST AND MORTGAGE COMPANIES [V207879]
DOLLARS; CANADA; OTHER FINANCIAL INSTITUTIONS [V207880]
DOLLARS; CANADA; ITEMS IN TRANSIT [V207881]
DOLLARS; CANADA; INVESTMENTS [V207882]
DOLLARS; CANADA; TERM DEPOSITS [V207883]
DOLLARS; CANADA; CENTRALS [V207884]
DOLLARS; CANADA; CHARTERED BANKS [V207885]
DOLLARS; CANADA; TRUST AND MORTGAGE COMPANIES [V207886]
DOLLARS; CANADA; OTHER FINANCIAL INSTITUTIONS [V207887]
DOLLARS; CANADA; COMMERCIAL PAPER AND SALES FINANCE COMPANIES'
NOTES [V207888]
DOLLARS; CANADA; BONDS AND DEBENTURES [V207889]
DOLLARS; CANADA; CANADA [V207890]
DOLLARS; CANADA; PROVINCIAL [V207891]
DOLLARS; CANADA; MUNICIPAL [V207892]
DOLLARS; CANADA; CORPORATION [V207893]
DOLLARS; CANADA; OTHER BONDS AND DEBENTURES [V207894]
DOLLARS; CANADA; SHARES HELD [V207895]
DOLLARS; CANADA; CENTRAL [V207896]
DOLLARS; CANADA; OTHER SHARES [V207897]
DOLLARS; CANADA; OTHER INVESTMENTS [V207898]
DOLLARS; CANADA; LOANS [V207899]

DOLLARS; CANADA; CASH LOANS [V207900]
DOLLARS; CANADA; PERSONAL [V207901]
DOLLARS; CANADA; FARM [V207902]
DOLLARS; CANADA; COMMERCIAL, INDUSTRIAL AND CO-OPERATIVE ENTERPRISES
[V207903]
DOLLARS; CANADA; ESTATE/ENDOWMENT [V207904]
DOLLARS; CANADA; OTHER CASH LOANS [V207905]
DOLLARS; CANADA; ALLOWANCE FOR DOUBTFUL LOANS [V207906]
DOLLARS; CANADA; MORTGAGES [V207907]
DOLLARS; CANADA; RESIDENTIAL MORTGAGES [V207908]
DOLLARS; CANADA; NATIONAL HOUSING ACT [V207909]
DOLLARS; CANADA; CONVENTIONAL [V207910]
DOLLARS; CANADA; FARM MORTGAGES [V207911]
DOLLARS; CANADA; COMMERCIAL, INDUSTRIAL AND CO-OPERATIVE ENTERPRISES
[V207912]
DOLLARS; CANADA; OTHER MORTGAGE LOANS [V207913]
DOLLARS; CANADA; ALLOWANCE FOR DOUBTFUL LOANS [V207914]
DOLLARS; CANADA; INTEREST [V207915]
DOLLARS; CANADA; FIXED ASSETS [V207916]
DOLLARS; CANADA; LAND AND BUILDINGS [V207917]
DOLLARS; CANADA; LAND [V207918]
DOLLARS; CANADA; BUILDINGS [V207919]
DOLLARS; CANADA; EQUIPMENT AND FURNITURE [V207920]
DOLLARS; CANADA; STABILISATION FUND DEPOSITS [V207921]
DOLLARS; CANADA; OTHER ASSETS [V207922]
DOLLARS; CANADA; TOTAL LIABILITIES AND MEMBERS EQUITIES [V207923]
DOLLARS; CANADA; ACCOUNTS PAYABLE [V207924]
DOLLARS; CANADA; INTEREST [V207925]
DOLLARS; CANADA; DIVIDENDS [V207926]
DOLLARS; CANADA; PROVISION FOR ADDITIONAL INTEREST AND REBATES [V207927]
DOLLARS; CANADA; INCOME TAX [V207928]
DOLLARS; CANADA; OTHER ACCOUNTS PAYABLE [V207929]
DOLLARS; CANADA; LOANS PAYABLE [V207930]
DOLLARS; CANADA; CENTRAL [V207931]
DOLLARS; CANADA; CHARTERED BANKS [V207932]
DOLLARS; CANADA; OTHER LOANS PAYABLE [V207933]
DOLLARS; CANADA; DEPOSITS [V207934]
DOLLARS; CANADA; DEMAND [V207935]
DOLLARS; CANADA; CHEQUING [V207936]
DOLLARS; CANADA; NONCHEQUING [V207937]
DOLLARS; CANADA; TERM DEPOSITS [V207938]

DOLLARS; CANADA; OTHER LIABILITIES [V207939]
DOLLARS; CANADA; SHARE CAPITAL [V207940]
DOLLARS; CANADA; ORDINARY SHARES [V207941]
DOLLARS; CANADA; ESTATE/ENDOWMENT [V207942]
DOLLARS; CANADA; OTHER SHARES [V207943]
DOLLARS; CANADA; RESERVES [V207944]
DOLLARS; CANADA; UNDIVIDED SURPLUS [V207945]

CANSIM II Table 1850016: Central Credit Unions Statements of Estimated Assets, Liabilities
and Members' Equities

Available Vectors

DOLLARS; CANADA; TOTAL ASSETS [V207946]
DOLLARS; CANADA; CASH AND DEMAND DEPOSITS [V207947]
DOLLARS; CANADA; ON HAND [V207948]
DOLLARS; CANADA; DEMAND DEPOSITS [V207949]
DOLLARS; CANADA; LOCAL CREDIT UNIONS [V207950]
DOLLARS; CANADA; CHARTERED BANKS [V207951]
DOLLARS; CANADA; TRUST AND MORTGAGE COMPANIES [V207952]
DOLLARS; CANADA; OTHER INSTITUTIONS IN CANADA [V207953]
DOLLARS; CANADA; ITEMS IN TRANSIT [V207954]
DOLLARS; CANADA; INVESTMENTS [V207955]
DOLLARS; CANADA; TERM DEPOSITS [V207956]
DOLLARS; CANADA; LOCAL CREDIT UNIONS [V207957]
DOLLARS; CANADA; CHARTERED BANKS [V207958]
DOLLARS; CANADA; TRUST AND MORTGAGE COMPANIES [V207959]
DOLLARS; CANADA; OTHER FINANCIAL INSTITUTIONS [V207960]
DOLLARS; CANADA; SHORT-TERM BILLS AND NOTES [V207961]
DOLLARS; CANADA; CANADA TREASURY BILLS [V207962]
DOLLARS; CANADA; PROVINCIAL TREASURY BILLS AND NOTES [V207963]
DOLLARS; CANADA; COMMERCIAL PAPER AND BANKERS' ACCEPTANCE [V207964]
DOLLARS; CANADA; BONDS AND DEBENTURES [V207965]
DOLLARS; CANADA; CANADA BONDS [V207966]
DOLLARS; CANADA; PROVINCIAL BONDS [V207967]
DOLLARS; CANADA; MUNICIPAL [V207968]
DOLLARS; CANADA; CORPORATION [V207969]
DOLLARS; CANADA; OTHER INSTITUTIONS [V207970]
DOLLARS; CANADA; OTHER INVESTMENTS [V207971]
DOLLARS; CANADA; PREFERRED SHARES [V207972]
DOLLARS; CANADA; COMMON SHARES [V207973]
DOLLARS; CANADA; INVESTMENTS AND ACCOUNTS WITH SUBSIDIARIES [V207974]

DOLLARS; CANADA; SHARES OF SUBSIDIARIES [V207975]
 DOLLARS; CANADA; LOANS AND ADVANCES TO SUBSIDIARIES [V207976]
 DOLLARS; CANADA; OTHER INVESTMENTS [V207977]
 DOLLARS; CANADA; LOANS [V207978]
 DOLLARS; CANADA; CASH LOANS [V207979]
 DOLLARS; CANADA; LOCAL CREDIT UNIONS [V207980]
 DOLLARS; CANADA; CENTRALS [V207981]
 DOLLARS; CANADA; COMMERCIAL, INDUSTRIAL AND CO-OPERATIVE ENTERPRISES
 [V207982]
 DOLLARS; CANADA; TRUST COMPANIES [V207983]
 DOLLARS; CANADA; OTHER CASH LOANS [V207984]
 DOLLARS; CANADA; ALLOWANCE FOR DOUBTFUL LOANS [V207985]
 DOLLARS; CANADA; MORTGAGES [V207986]
 DOLLARS; CANADA; RESIDENTIAL [V207987]
 DOLLARS; CANADA; NATIONAL HOUSING ACT [V207988]
 DOLLARS; CANADA; CONVENTIONAL [V207989]
 DOLLARS; CANADA; LOCAL CREDIT UNIONS [V207990]
 DOLLARS; CANADA; COMMERCIAL, INDUSTRIAL AND CO-OPERATIVE ENTERPRISES
 [V207991]
 DOLLARS; CANADA; OTHER MORTGAGE LOANS [V207992]
 DOLLARS; CANADA; ALLOWANCE FOR DOUBTFUL LOANS [V207993]
 DOLLARS; CANADA; ACCOUNTS RECEIVABLE, INTEREST AND PREPAID EXPENSES [V207994]
 DOLLARS; CANADA; LAND, BUILDING, NET [V207995]
 DOLLARS; CANADA; OTHER ASSETS [V207996]
 DOLLARS; CANADA; TOTAL LIABILITIES AND EQUITY [V207997]
 DOLLARS; CANADA; ACCOUNTS PAYABLE [V207998]
 DOLLARS; CANADA; INTEREST [V207999]
 DOLLARS; CANADA; OTHER ACCOUNTS PAYABLE [V208000]
 DOLLARS; CANADA; NOTES AND LOANS PAYABLE [V208001]
 DOLLARS; CANADA; LOCAL CREDIT UNIONS [V208002]
 DOLLARS; CANADA; CHARTERED BANKS [V208003]
 DOLLARS; CANADA; OTHER NOTES AND LOANS PAYABLE [V208004]
 DOLLARS; CANADA; DEPOSITS [V208005]
 DOLLARS; CANADA; DEMAND DEPOSITS [V208006]
 DOLLARS; CANADA; LOCAL CREDIT UNIONS [V208007]
 DOLLARS; CANADA; GOVERNMENT ACCOUNTS [V208008]
 DOLLARS; CANADA; OTHER DEMAND DEPOSITS [V208009]
 DOLLARS; CANADA; TERM DEPOSITS [V208010]
 DOLLARS; CANADA; LOCAL CREDIT UNIONS [V208011]
 DOLLARS; CANADA; ORIGINAL TERM TO MATURITY OF LESS THAN ONE YEAR [V208012]
 DOLLARS; CANADA; ORIGINAL TERM TO MATURITY OF ONE YEAR OR MORE [V208013]

DOLLARS; CANADA; OTHER TERM DEPOSITS [V208014]
DOLLARS; CANADA; PROMISSORY NOTES [V208015]
DOLLARS; CANADA; OTHER LIABILITIES [V208016]
DOLLARS; CANADA; SHARE CAPITAL [V208017]
DOLLARS; CANADA; HELD BY LOCAL CREDIT UNIONS [V208018]
DOLLARS; CANADA; OTHER SHARES [V208019]
DOLLARS; CANADA; RESERVE FUND [V208020]
DOLLARS; CANADA; UNDIVIDED EARNINGS [V208021]
DOLLARS; CANADA; LONG-TERM BONDS AND DEBENTURES [V208022]

CANSIM II Table 1850031: Estimated Mortgages Outstanding by Selected Financial Institutions, 1972–1981

Available Vectors

DOLLARS; CANADA; LOCAL CREDIT UNIONS [V212323]
DOLLARS; CANADA; CENTRAL CREDIT UNIONS [V212324]

Data Source: Gross Domestic Product by Industry — Monthly (ID 1301)

This is an active survey. The most recent data release was in April 2005, with data from February 2005.

This survey is derived from administrative data sources and provides information for current economic analysis from an industry point of view. It also serves as a check of the gross domestic product, income and expenditures, prepared by the Income and Expenditure Accounts Division, and as an extension (on a monthly basis) of the System of National Accounts Input-Output Tables.

CANSIM II Table 3790004: Gross Domestic Product (GDP) at Factor Cost in 1992 Constant Dollars, by Standard Industrial Classification, 1980 (SIC), 1961–2000

Available Vector

DOLLARS; CANADA; CREDIT UNIONS [V328851]

CANSIM II Table 3790005: Gross Domestic Product (GDP) at Factor Cost in 1992 Constant Dollars, by Standard Industrial Classification, 1980 (SIC), 1992–2001

Available Vectors

DOLLARS; CANADA; SEASONALLY ADJUSTED; CREDIT UNIONS [V329161]
DOLLARS; CANADA; UNADJUSTED; CREDIT UNIONS [V329471]

CANSIM II Table 3790006: Gross Domestic Product (GDP) at Factor Cost in 1992 Constant Dollars, by Standard Industrial Classification, 1980 (SIC), 1961–2001

Available Vectors

DOLLARS; CANADA; SEASONALLY ADJUSTED; CREDIT UNIONS [V329781]

DOLLARS; CANADA; UNADJUSTED; CREDIT UNIONS [V330091]

CANSIM II Table 3790007: Gross Domestic Product (GDP) at Factor Cost, by Standard Industrial Classification, 1980 (SIC), 1961–1990

Available Vectors

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; SEASONALLY ADJUSTED AT ANNUAL RATES; 1981 CONSTANT PRICES [V326551]

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; UNADJUSTED; 1981 CONSTANT PRICES [V326778]

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; SEASONALLY ADJUSTED AT ANNUAL RATES; 1986 CONSTANT PRICES [V327728]

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; UNADJUSTED; 1986 CONSTANT PRICES [V327955]

CANSIM II Table 3790008: Gross Domestic Product (GDP) at Factor Cost, by Standard Industrial Classification, 1980 (SIC), 1961–1990

Available Vectors

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; SEASONALLY ADJUSTED AT ANNUAL RATES; 1981 CONSTANT PRICES [V326097]

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; UNADJUSTED; 1981 CONSTANT PRICES [V326324]

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; SEASONALLY ADJUSTED AT ANNUAL RATES; 1986 CONSTANT PRICES [V327274]

DOLLARS; CANADA; BANKS, CREDIT UNIONS AND OTHER DEPOSIT-TAKING INSTITUTIONS; UNADJUSTED; 1986 CONSTANT PRICES [V327501]

CANSIM II Table 3790017: Gross Domestic Product (GDP) at Basic Prices, by North American Industry Classification System (NAICS), 1997–2002

Available Vectors

CANADA; CHAINED 1997 DOLLARS; LOCAL CREDIT UNIONS [V14183462]

CANADA; LOCAL CREDIT UNIONS [V2035154]

CANSIM II Table 3790018: Gross Domestic Product (GDP) at Basic Prices, by North American Industry Classification System (NAICS), 1997–2002

Available Vectors

CANADA; SEASONALLY ADJUSTED; CHAINED 1997 DOLLARS; LOCAL CREDIT UNIONS [V14183149]

CANADA; UNADJUSTED; LOCAL CREDIT UNIONS [V2035465]

CANADA; SEASONALLY ADJUSTED; LOCAL CREDIT UNIONS [V2035776]

CANSIM II Table 3790019: Gross Domestic Product (GDP) at Basic Prices, by North American Industry Classification System (NAICS), 1997–2003

Available Vectors

CANADA; SEASONALLY ADJUSTED; CHAINED 1997 DOLLARS; LOCAL CREDIT UNIONS [V14182837]

CANADA; UNADJUSTED; LOCAL CREDIT UNIONS [V2036087]

CANADA; SEASONALLY ADJUSTED; LOCAL CREDIT UNIONS [V2036398]

Data Source: Quarterly Survey of Financial Statistics for Enterprises (ID 2501)

This survey (QFS) has been active since 1951, with the most recent data release being for the first quarter of 2005, posted in May of that year. The data for this mandatory survey is collected directly from a sample of enterprises and comprises financial statements typically prepared by incorporated businesses to record their financial position and performance. The data include asset, liability, and equity items recorded in a quarterly balance sheet, revenue and expenses reported on a quarterly income statement, as well as additional supplementary items. These data are combined with additional information for the business and other sectors to produce complete economy-wide accounts that show the creation and distribution of wealth as well as the financing of economic activity. This is made possible by presenting considerable detail on financial institutions within the sector accounts framework.

The domestic economy consists of the nonfinancial and financial business sectors, the government sector, and the persons and unincorporated business sector, which includes nonprofit institutions serving households. The statistical unit used in this survey is the enterprise.

Corporate activities across the economy are extremely diverse, which results in equally diverse financial reporting variables. To accommodate this, the quarterly survey uses sixteen different questionnaires. Although the majority of items on the questionnaires have remained unchanged for several years, situations periodically arise that necessitate modifica-

tions. Changes are proposed by a review committee and field tested with respondents and data users to ensure that the changes are reasonable and sustainable. The Data Dissemination Division prepares the final version of the revised questionnaires and updates the revision date on the form.

The Statistics Canada Business Register supplies the frame used for sampling purposes. It is a stratified random sample, with two strata (take-all and take-some) for each of the Level III (164 categories) aggregations. Each aggregation is also stratified according to country-of-control (Canada, United States, or Other Foreign). All units in the first stratum (take-all) are selected. For the lower stratum (take-some), sampling rates vary by aggregation, but average about one unit in seven. The total sample size is approximately 5,500 enterprises.

The survey is a mail-out/mail-back document collected on a quarterly basis and sent approximately one week prior to the end of quarter. It is directed to the financial reporting department and is to be completed by the chief financial officer or a senior reporting officer.

Respondents have thirty days after quarter-end to complete and return the questionnaire to Statistics Canada. They can reply by mail or fax. Information may be transmitted by telephone, but subsequent confirmation is required either by mail or fax. An automatic fax reminder is sent to nonreporters around day fifteen of the follow-up period. Telephone contact is made with nonreporting enterprises during a two-week period around the thirty-day cutoff point to discuss delinquency and possible special arrangements. A second fax is sent to persistent nonreporters later in the month subsequent to the thirty-day cut-off date. In exceptional cases, an enterprise may not be able to comply with the legal reporting deadlines, in which case special reporting arrangements are made.

CANSIM II Table 1870003: Financial Statistics for Enterprises, Balance Sheet and Income Statement, Based on Standard Industrial Classification for Companies and Enterprises, 1980 (SIC-C), 1980–1998

Available Vectors

DOLLARS; CANADA; CREDIT UNIONS; TOTAL ASSETS [V221440]

DOLLARS; CANADA; CREDIT UNIONS; CASH AND DEPOSITS [V221441]

DOLLARS; CANADA; CREDIT UNIONS; OTHER ASSETS [V221442]

DOLLARS; CANADA; CREDIT UNIONS; ACCOUNTS RECEIVABLE AND ACCRUED REVENUE [V221443]

DOLLARS; CANADA; CREDIT UNIONS; INVESTMENTS AND ACCOUNTS WITH AFFILIATES [V221444]

DOLLARS; CANADA; CREDIT UNIONS; PORTFOLIO INVESTMENTS [V221445]
DOLLARS; CANADA; CREDIT UNIONS; LOANS [V221446]
DOLLARS; CANADA; CREDIT UNIONS; MORTGAGE [V221447]
DOLLARS; CANADA; CREDIT UNIONS; NONMORTGAGE [V221448]
DOLLARS; CANADA; CREDIT UNIONS; ALLOWANCE FOR LOSSES ON INVESTMENTS AND
LOANS [V221449]
DOLLARS; CANADA; CREDIT UNIONS; CAPITAL ASSETS, NET [V221450]
DOLLARS; CANADA; CREDIT UNIONS; OPERATING REVENUE [V221451]
DOLLARS; CANADA; CREDIT UNIONS; GAINS ON SALE OF SECURITIES AND OTHER ASSETS
[V221452]
DOLLARS; CANADA; CREDIT UNIONS; OTHER OPERATING REVENUE [V221453]
DOLLARS; CANADA; CREDIT UNIONS; INTEREST [V221454]
DOLLARS; CANADA; CREDIT UNIONS; DIVIDENDS [V221455]
DOLLARS; CANADA; CREDIT UNIONS; OPERATING EXPENSES [V221456]
DOLLARS; CANADA; CREDIT UNIONS; DEPRECIATION AND AMORTIZATION [V221457]
DOLLARS; CANADA; CREDIT UNIONS; INTEREST [V221458]
DOLLARS; CANADA; CREDIT UNIONS; ON DEPOSITS [V221459]
DOLLARS; CANADA; CREDIT UNIONS; DEMAND [V221460]
DOLLARS; CANADA; CREDIT UNIONS; TERM [V221461]
DOLLARS; CANADA; CREDIT UNIONS; OTHER OPERATING EXPENSES [V221462]
DOLLARS; CANADA; CREDIT UNIONS; OPERATING PROFIT [V221463]
DOLLARS; CANADA; CREDIT UNIONS; OTHER EXPENSES [V221464]
DOLLARS; CANADA; CREDIT UNIONS; INTEREST ON BORROWINGS [V221465]
DOLLARS; CANADA; CREDIT UNIONS; GAINS AND LOSSES, NOT ELSEWHERE SPECIFIED
[V221466]
DOLLARS; CANADA; CREDIT UNIONS; PROFIT BEFORE INCOME TAX [V221467]
DOLLARS; CANADA; CREDIT UNIONS; INCOME TAX [V221468]
DOLLARS; CANADA; CREDIT UNIONS; EQUITY IN AFFILIATES' EARNINGS [V221469]
DOLLARS; CANADA; CREDIT UNIONS; NET PROFIT [V221470]
DOLLARS; CANADA; CREDIT UNIONS; PROFIT BEFORE EXTRAORDINARY GAINS [V221471]
DOLLARS; CANADA; CREDIT UNIONS; EXTRAORDINARY GAINS [V221472]
DOLLARS; CANADA; CREDIT UNIONS; TOTAL LIABILITIES [V221473]
DOLLARS; CANADA; CREDIT UNIONS; DEPOSITS [V221474]
DOLLARS; CANADA; CREDIT UNIONS; DEMAND [V221475]
DOLLARS; CANADA; CREDIT UNIONS; TERM [V221476]
DOLLARS; CANADA; CREDIT UNIONS; ACCOUNTS PAYABLE AND ACCRUED LIABILITIES
[V221477]
DOLLARS; CANADA; CREDIT UNIONS; LOANS AND ACCOUNTS WITH AFFILIATES [V221478]
DOLLARS; CANADA; CREDIT UNIONS; BORROWINGS [V221479]
DOLLARS; CANADA; CREDIT UNIONS; LOANS AND OVERDRAFTS [V221480]
DOLLARS; CANADA; CREDIT UNIONS; FROM BANKS [V221481]

DOLLARS; CANADA; CREDIT UNIONS; FROM OTHERS [V221482]
DOLLARS; CANADA; CREDIT UNIONS; BONDS AND DEBENTURES [V221483]
DOLLARS; CANADA; CREDIT UNIONS; MORTGAGES [V221484]
DOLLARS; CANADA; CREDIT UNIONS; DEFERRED INCOME TAX [V221485]
DOLLARS; CANADA; CREDIT UNIONS; OTHER LIABILITIES [V221486]
DOLLARS; CANADA; CREDIT UNIONS; TOTAL, EQUITY [V221487]
DOLLARS; CANADA; CREDIT UNIONS; SHARE CAPITAL [V221488]
DOLLARS; CANADA; CREDIT UNIONS; CONTRIBUTED SURPLUS AND OTHER [V221489]
DOLLARS; CANADA; CREDIT UNIONS; RETAINED EARNINGS [V221490]
DOLLARS; CANADA; CREDIT UNIONS; APPROPRIATED [V221491]
DOLLARS; CANADA; CREDIT UNIONS; UNAPPROPRIATED [V221492]

CANSIM II Table 1870004: Financial Statistics for Enterprises, Statement of Change in Financial Position,
Based on Standard Industrial Classification for Companies and Enterprises, 1980 (SIC-E),
1991–1998

Available Vectors

CANADA; CREDIT UNIONS; TOTAL CASH AVAILABLE [V221493]
CANADA; CREDIT UNIONS; CASH FROM OPERATING ACTIVITIES [V221494]
CANADA; CREDIT UNIONS; NET PROFIT [V221495]
CANADA; CREDIT UNIONS; NONCASH ITEMS [V221496]
CANADA; CREDIT UNIONS; DEPRECIATION, DEPLETION AND AMORTIZATION [V221497]
CANADA; CREDIT UNIONS; DEFERRED INCOME TAX [V221498]
CANADA; CREDIT UNIONS; WORKING CAPITAL [V221499]
CANADA; CREDIT UNIONS; OTHER NONCASH ITEMS [V221500]
CANADA; CREDIT UNIONS; PRIOR PERIOD CASH TRANSACTIONS [V221501]
CANADA; CREDIT UNIONS; CASH FROM FINANCING ACTIVITIES [V221502]
CANADA; CREDIT UNIONS; INCREASE IN DEPOSITS [V221503]
CANADA; CREDIT UNIONS; DEMAND [V221504]
CANADA; CREDIT UNIONS; TERM [V221505]
CANADA; CREDIT UNIONS; BORROWINGS FROM BANKS [V221506]
CANADA; CREDIT UNIONS; BORROWINGS FROM AFFILIATES [V221507]
CANADA; CREDIT UNIONS; OTHER BORROWINGS [V221508]
CANADA; CREDIT UNIONS; BONDS AND DEBENTURES [V221509]
CANADA; CREDIT UNIONS; MORTGAGES [V221510]
CANADA; CREDIT UNIONS; OTHER BORROWINGS, NOT ELSEWHERE CLASSIFIED [V221511]
CANADA; CREDIT UNIONS; EQUITY [V221512]
CANADA; CREDIT UNIONS; RETURN ON CAPITAL EMPLOYED [V221513]
CANADA; CREDIT UNIONS; RETURN ON ASSETS [V221514]
CANADA; CREDIT UNIONS; RETURN ON EQUITY [V221515]
CANADA; CREDIT UNIONS; PROFIT MARGIN [V221516]

CANADA; CREDIT UNIONS; CAPITAL [V221517]
CANADA; CREDIT UNIONS; DEBT TO EQUITY [V221518]
CANADA; CREDIT UNIONS; TOTAL APPLICATIONS OF CASH [V221519]
CANADA; CREDIT UNIONS; CASH APPLIED TO INVESTMENT ACTIVITIES [V221520]
CANADA; CREDIT UNIONS; INVESTMENTS IN AFFILIATES [V221521]
CANADA; CREDIT UNIONS; PORTFOLIO INVESTMENTS [V221522]
CANADA; CREDIT UNIONS; LOANS [V221523]
CANADA; CREDIT UNIONS; MORTGAGE LOANS [V221524]
CANADA; CREDIT UNIONS; NONMORTGAGE LOANS [V221525]
CANADA; CREDIT UNIONS; CASH APPLIED TO FIXED ASSETS [V221526]
CANADA; CREDIT UNIONS; CASH APPLIED TO DIVIDENDS [V221527]
CANADA; CREDIT UNIONS; OPERATING COSTS PER ONE HUNDRED DOLLARS OF ASSETS [V221528]
CANADA; CREDIT UNIONS; OPERATING REVENUE, PERCENTAGE CHANGE, SEASONALLY ADJUSTED [V221529]
CANADA; CREDIT UNIONS; OPERATING EXPENSES, PERCENTAGE CHANGE, SEASONALLY ADJUSTED [V221530]
CANADA; CREDIT UNIONS; OPERATING PROFIT, PERCENTAGE CHANGE, SEASONALLY ADJUSTED [V221531]
CANADA; CREDIT UNIONS; INCREASE/DECREASE IN CASH [V221532]
CANADA; CREDIT UNIONS; OPERATING REVENUE, SEASONALLY ADJUSTED [V221533]
CANADA; CREDIT UNIONS; OPERATING PROFIT, SEASONALLY ADJUSTED [V221534]
CANADA; CREDIT UNIONS; PROFIT BEFORE EXTRAORDINARY GAINS, SEASONALLY ADJUSTED [V221535]
CANADA; CREDIT UNIONS; NET PROFIT, SEASONALLY ADJUSTED [V221536]

Data Source: Financial and Taxation Statistics for Enterprises (ID 2510)

This survey is active and conducted on an annual basis. It is a census that uses administrative data for its source. In the most recent release, data for 2003 were posted in February 2005.

The data compiled as annual Financial and Taxation Statistics for Enterprises comprise financial statements typically prepared by incorporated businesses to record their financial position and performance. They include asset, liability, and equity items encompassed in an annual balance sheet, as well as revenue and expenses reported on an annual income statement and selected financial performance indicators (ratios).

The objective of this annual series is to cover business activity within a calendar year. Data derived from the Quarterly Survey of Financial Statistics approximate this period. The government business enterprise data reflect fiscal periods, which are often ruled by the gov-

ernment's April-to-March fiscal year. The administrative data obtained from the Canada Customs and Revenue Agency (CCRA) is based on financial statements filed with income tax returns for the corporate fiscal year, which ends in the calendar period. The calendar period is thus estimated by industry aggregations, which actually consist of a combination of both calendar and fiscal periods and may not coincide perfectly with the calendar period.

Since 1999, the Financial and Taxation Statistics for Enterprises program has undergone numerous significant changes that affect both the comparability and the historical continuity of the published statistics. Changes in industrial classification, methodology, data sources, and content have all been introduced. Data are now collected and compiled on the basis of the North American Industrial Classification System¹ (NAICS). Moreover, the data are assembled for the entire incorporated business population as depicted in Statistics Canada's Business Register. This census is made possible by supplementing data collected through Statistics Canada's QFS and the survey of provincial or federal government business enterprises, with administrative data available from the CCRA.

Content has been affected in two ways. First, the taxation component of the historically disseminated data is not available for reference year 1999, although the taxation statistics are expected to be reintroduced and disseminated with the 2002 publication for the reference years 2000, 2001, and 2002. Second, although the financial data are still presented in the basic format of a balance sheet and income statement, certain items have changed.

These statistics cover incorporated enterprises of the financial and nonfinancial business sectors, including businesses controlled by federal or provincial governments and non-profit enterprises considered part of the incorporated business sector. Enterprises classified to funds (NAICS 5269) and public administration (NAICS 91), however, are excluded.

Three data sources combine into a census of all units in the population of interest:

1. annualized data from the Quarterly Survey of Financial Statistics for Enterprises (QFS—Survey ID 2501);
2. a survey of provincial or federal government business enterprises (GBE) that operated in the business sector, with data obtained from Statistics Canada's Public Institutions Division; and
3. administrative corporate taxation data from the General Index of Financial Information (GIFI) obtained from Statistics Canada's Tax Data Division.

The information was presented in three different formats with different sets of variables. To merge the data required the transformation of all three sources into a common set of variables that contained a complete set of financial statement information. Certain details were omitted in the process due to the unavailability of data from all sources.

CANSIM II Table 1800001: Financial and Taxation Statistics for Enterprises, 1988–1998

Available Vectors

CANADA; TOTAL ASSETS; CREDIT UNIONS [V232796]
CANADA; CASH AND DEPOSITS; CREDIT UNIONS [V232797]
CANADA; OTHER ASSETS; CREDIT UNIONS [V232798]
CANADA; ACCOUNTS RECEIVABLE AND ACCRUED REVENUE; CREDIT UNIONS [V232799]
CANADA; INVESTMENTS AND ACCOUNTS WITH AFFILIATES; CREDIT UNIONS [V232800]
CANADA; PORTFOLIO INVESTMENTS; CREDIT UNIONS [V232801]
CANADA; LOANS; CREDIT UNIONS [V232802]
CANADA; MORTGAGE LOANS; CREDIT UNIONS [V232803]
CANADA; NONMORTGAGE LOANS; CREDIT UNIONS [V232804]
CANADA; ALLOWANCE FOR LOSSES ON INVESTMENTS AND LOANS; CREDIT UNIONS [V232805]
CANADA; CAPITAL ASSETS, NET; CREDIT UNIONS [V232806]
CANADA; OPERATING REVENUE; CREDIT UNIONS [V232807]
CANADA; GAIN ON SALE OF SECURITIES AND OTHER ASSETS; CREDIT UNIONS [V232808]
CANADA; OTHER OPERATING REVENUE; CREDIT UNIONS [V232809]
CANADA; INTEREST; CREDIT UNIONS [V232810]
CANADA; DIVIDENDS; CREDIT UNIONS [V232811]
CANADA; OPERATING EXPENSES; CREDIT UNIONS [V232812]
CANADA; DEPRECIATION AND AMORTIZATION; CREDIT UNIONS [V232813]
CANADA; INTEREST; CREDIT UNIONS [V232814]
CANADA; INTEREST ON DEPOSITS; CREDIT UNIONS [V232815]
CANADA; INTEREST ON DEMAND DEPOSITS; CREDIT UNIONS [V232816]
CANADA; INTEREST ON TERM DEPOSITS; CREDIT UNIONS [V232817]
CANADA; OTHER OPERATING EXPENSES; CREDIT UNIONS [V232818]
CANADA; OPERATING PROFIT; CREDIT UNIONS [V232819]
CANADA; OTHER EXPENSES; CREDIT UNIONS [V232820]
CANADA; INTEREST ON BORROWINGS; CREDIT UNIONS [V232821]
CANADA; GAINS AND LOSSES, NOT ELSEWHERE SPECIFIED; CREDIT UNIONS [V232822]
CANADA; PROFIT BEFORE INCOME TAXES; CREDIT UNIONS [V232823]
CANADA; INCOME TAX; CREDIT UNIONS [V232824]
CANADA; EQUITY IN AFFILIATES' EARNINGS; CREDIT UNIONS [V232825]
CANADA; NET PROFIT; CREDIT UNIONS [V232826]

CANADA; PROFIT BEFORE EXTRAORDINARY GAINS; CREDIT UNIONS [V232827]
CANADA; EXTRAORDINARY GAINS; CREDIT UNIONS [V232828]
CANADA; TOTAL LIABILITIES; CREDIT UNIONS [V232829]
CANADA; AMOUNTS LEFT ON DEPOSIT; CREDIT UNIONS [V232830]
CANADA; DEMAND, AMOUNTS LEFT ON DEPOSIT; CREDIT UNIONS [V232831]
CANADA; TERM, AMOUNTS LEFT ON DEPOSIT; CREDIT UNIONS [V232832]
CANADA; ACCOUNTS PAYABLE AND ACCRUED LIABILITIES; CREDIT UNIONS [V232833]
CANADA; LOANS AND ACCOUNTS WITH AFFILIATES; CREDIT UNIONS [V232834]
CANADA; BORROWINGS; CREDIT UNIONS [V232835]
CANADA; LOANS AND OVERDRAFTS; CREDIT UNIONS [V232836]
CANADA; LOANS AND OVERDRAFTS FROM BANKS; CREDIT UNIONS [V232837]
CANADA; LOANS AND OVERDRAFTS FROM OTHERS; CREDIT UNIONS [V232838]
CANADA; BONDS AND DEBENTURES; CREDIT UNIONS [V232839]
CANADA; MORTGAGES; CREDIT UNIONS [V232840]
CANADA; DEFERRED INCOME TAX; CREDIT UNIONS [V232841]
CANADA; OTHER LIABILITIES; CREDIT UNIONS [V232842]
CANADA; NET PROFIT; CREDIT UNIONS [V232843]
CANADA; PLUS: CONSOLIDATION ADJUSTMENTS; CREDIT UNIONS [V232844]
CANADA; PLUS: CONCEPTUAL ADJUSTMENTS; CREDIT UNIONS [V232845]
CANADA; LESS: PROFIT OF TAX EXEMPT CORPORATIONS; CREDIT UNIONS [V232846]
CANADA; DEDUCTIBLE DIVIDENDS; CREDIT UNIONS [V232847]
CANADA; PLUS: CURRENT TAXES, INCLUDING MINING; CREDIT UNIONS [V232848]
CANADA; PLUS: DEFERRED INCOME TAXES; CREDIT UNIONS [V232849]
CANADA; ADJUSTED PROFIT BEFORE TAXES; CREDIT UNIONS [V232850]
CANADA; NET DIFFERENCE, CAPITAL GAINS AND LOSSES; CREDIT UNIONS [V232851]
CANADA; BOOK CAPITAL GAINS AND LOSSES; CREDIT UNIONS [V232852]
CANADA; LESS: TAXABLE CAPITAL GAINS; CREDIT UNIONS [V232853]
CANADA; NET DIFFERENCE, RESOURCE ALLOWANCE; CREDIT UNIONS [V232854]
CANADA; RESOURCE ALLOWANCE; CREDIT UNIONS [V232855]
CANADA; LESS: ROYALTIES; CREDIT UNIONS [V232856]
CANADA; EARNED DEPLETION ALLOWANCE; CREDIT UNIONS [V232857]
CANADA; TOTAL EQUITY; CREDIT UNIONS [V232858]
CANADA; SHARE CAPITAL; CREDIT UNIONS [V232859]
CANADA; CONTRIBUTED SURPLUS AND OTHER; CREDIT UNIONS [V232860]
CANADA; RETAINED EARNINGS; CREDIT UNIONS [V232861]
CANADA; APPROPRIATED, RETAINED EARNINGS; CREDIT UNIONS [V232862]
CANADA; UNAPPROPRIATED, RETAINED EARNINGS; CREDIT UNIONS [V232863]
CANADA; OTHER EXEMPTIONS AND DEDUCTIONS; CREDIT UNIONS [V232864]
CANADA; TOTAL, EXEMPTIONS AND DEDUCTIONS; CREDIT UNIONS [V232865]
CANADA; NET DIFFERENCE, DEPRECIATION; CREDIT UNIONS [V232866]
CANADA; DEPRECIATION; CREDIT UNIONS [V232867]

CANADA; LESS: CAPITAL COST ALLOWANCE; CREDIT UNIONS [V232868]
CANADA; NET DIFFERENCE, NATURAL RESOURCES EXPENSES; CREDIT UNIONS [V232869]
CANADA; NATURAL RESOURCES EXPENSES, (BOOKS); CREDIT UNIONS [V232870]
CANADA; LESS: NATURAL RESOURCE EXPENSES, (TAX); CREDIT UNIONS [V232871]
CANADA; CHARITABLE DONATIONS NET DIFFERENCE, (BOOKS MINUS TAX); CREDIT UNIONS [V232872]
CANADA; OTHER TIMING DIFFERENCES; CREDIT UNIONS [V232873]
CANADA; TOTAL, TIMING DIFFERENCES; CREDIT UNIONS [V232874]
CANADA; NET TAXABLE INCOME; CREDIT UNIONS [V232875]
CANADA; PLUS: CURRENT YEAR TAX LOSSES; CREDIT UNIONS [V232876]
CANADA; CURRENT YEAR POSITIVE TAXABLE INCOME; CREDIT UNIONS [V232877]
CANADA; LESS: PRIOR YEAR LOSSES APPLIED; CREDIT UNIONS [V232878]
CANADA; TAXABLE INCOME, TAX BASE; CREDIT UNIONS [V232879]
CANADA; PART 1 TAX, OTHERWISE PAYABLE; CREDIT UNIONS [V232880]
CANADA; CORPORATE SURTAX; CREDIT UNIONS [V232881]
CANADA; FEDERAL TAX ABATEMENT; CREDIT UNIONS [V232882]
CANADA; SMALL BUSINESS DEDUCTION; CREDIT UNIONS [V232883]
CANADA; MANUFACTURING AND PROCESSING PROFITS DEDUCTION; CREDIT UNIONS [V232884]
CANADA; INVESTMENT TAX CREDIT; CREDIT UNIONS [V232885]
CANADA; OTHER FEDERAL TAX CREDITS; CREDIT UNIONS [V232886]
CANADA; TOTAL TAXES; CREDIT UNIONS [V232887]
CANADA; TOTAL FEDERAL TAX; CREDIT UNIONS [V232888]
CANADA; NET PART 1 TAX PAYABLE; CREDIT UNIONS [V232889]
CANADA; OTHER DIRECT FEDERAL TAXES; CREDIT UNIONS [V232890]
CANADA; PROVINCIAL INCOME TAXES; CREDIT UNIONS [V232891]
CANADA; RETURN ON EQUITY; CREDIT UNIONS [V232892]
CANADA; PROFIT MARGIN; CREDIT UNIONS [V232893]
CANADA; RETURN ON CAPITAL EMPLOYED; CREDIT UNIONS [V232894]
CANADA; DEBT TO EQUITY; CREDIT UNIONS [V232895]
CANADA; TAXES TO POSITIVE ADJUSTED PROFIT; CREDIT UNIONS [V232896]
CANADA; INCOME TAXES TO TAXABLE INCOME; CREDIT UNIONS [V232897]

CANSIM II Table 1800003: Financial and Taxation Statistics for Enterprises, by North American Industry Classification System (NAICS), 1998–2001

Available Vectors

CANADA; ASSETS; CREDIT UNIONS [V3869040]
CANADA; NONMORTGAGE; CREDIT UNIONS [V3869100]
CANADA; BANK CUSTOMERS' LIABILITIES UNDER ACCEPTANCES; CREDIT UNIONS [V3869160]
CANADA; CAPITAL ASSETS, NET; CREDIT UNIONS [V3869220]

CANADA; OTHER ASSETS; CREDIT UNIONS [V3869280]
 CANADA; LIABILITIES; CREDIT UNIONS [V3869340]
 CANADA; ACCOUNTS PAYABLE AND ACCRUED LIABILITIES; CREDIT UNIONS [V3869400]
 CANADA; LOANS AND ACCOUNTS WITH AFFILIATES; CREDIT UNIONS [V3869460]
 CANADA; BORROWINGS; CREDIT UNIONS [V3869520]
 CANADA; LOANS AND OVERDRAFTS; CREDIT UNIONS [V3869580]
 CANADA; FROM BANKS; CREDIT UNIONS [V3869640]
 CANADA; CASH AND DEPOSITS; CREDIT UNIONS [V3869700]
 CANADA; FROM OTHERS; CREDIT UNIONS [V3869760]
 CANADA; BANKERS' ACCEPTANCES AND PAPER; CREDIT UNIONS [V3869820]
 CANADA; BONDS AND DEBENTURES; CREDIT UNIONS [V3869880]
 CANADA; MORTGAGES; CREDIT UNIONS [V3869940]
 CANADA; DEFERRED INCOME TAX; CREDIT UNIONS [V3870000]
 CANADA; BANK CUSTOMERS' LIABILITIES UNDER ACCEPTANCES; CREDIT UNIONS
 [V3870060]
 CANADA; OTHER LIABILITIES; CREDIT UNIONS [V3870120]
 CANADA; EQUITY; CREDIT UNIONS [V3870180]
 CANADA; SHARE CAPITAL; CREDIT UNIONS [V3870240]
 CANADA; CONTRIBUTED SURPLUS AND OTHER; CREDIT UNIONS [V3870300]
 CANADA; ACCOUNTS RECEIVABLE AND ACCRUED REVENUE; CREDIT UNIONS [V3870360]
 CANADA; RETAINED EARNINGS; CREDIT UNIONS [V3870420]
 CANADA; OPERATING REVENUE; CREDIT UNIONS [V3870480]
 CANADA; SALES OF GOODS AND SERVICES; CREDIT UNIONS [V3870540]
 CANADA; INTEREST AND DIVIDEND REVENUE (OPERATING); CREDIT UNIONS [V3870600]
 CANADA; OTHER OPERATING REVENUE; CREDIT UNIONS [V3870660]
 CANADA; OPERATING EXPENSES; CREDIT UNIONS [V3870720]
 CANADA; PURCHASED GOODS, MATERIALS AND SERVICE; CREDIT UNIONS [V3870780]
 CANADA; WAGES, SALARIES AND EMPLOYEE BENEFITS; CREDIT UNIONS [V3870840]
 CANADA; INDIRECT TAXES; CREDIT UNIONS [V3870900]
 CANADA; DEPRECIATION, DEPLETION AND AMORTIZATION; CREDIT UNIONS [V3870960]
 CANADA; INVENTORIES; CREDIT UNIONS [V3871020]
 CANADA; INTEREST EXPENSE (OPERATING); CREDIT UNIONS [V3871080]
 CANADA; OTHER OPERATING EXPENSES; CREDIT UNIONS [V3871140]
 CANADA; OPERATING PROFIT/LOSS; CREDIT UNIONS [V3871200]
 CANADA; INTEREST AND DIVIDEND REVENUE; CREDIT UNIONS [V3871260]
 CANADA; INTEREST EXPENSE ON BORROWING; CREDIT UNIONS [V3871320]
 CANADA; GAINS/LOSSES; CREDIT UNIONS [V3871380]
 CANADA; PROFIT BEFORE INCOME TAX; CREDIT UNIONS [V3871440]
 CANADA; INCOME TAX; CREDIT UNIONS [V3871500]
 CANADA; EQUITY IN AFFILIATES' EARNINGS; CREDIT UNIONS [V3871560]
 CANADA; PROFIT BEFORE EXTRAORDINARY GAINS; CREDIT UNIONS [V3871620]

CANADA; INVESTMENTS; CREDIT UNIONS [V3871680]
CANADA; EXTRAORDINARY GAINS; CREDIT UNIONS [V3871740]
CANADA; NET PROFIT; CREDIT UNIONS [V3871800]
CANADA; PROFIT MARGIN; CREDIT UNIONS [V3871860]
CANADA; RETURN ON EQUITY; CREDIT UNIONS [V3871920]
CANADA; RETURN ON CAPITAL EMPLOYED; CREDIT UNIONS [V3871980]
CANADA; DEBT TO EQUITY; CREDIT UNIONS [V3872040]
CANADA; WORKING CAPITAL; CREDIT UNIONS [V3872100]
CANADA; QUICK RATIO; CREDIT UNIONS [V3872160]
CANADA; INVENTORY TURNOVER; CREDIT UNIONS [V3872220]
CANADA; RECEIVABLES TURNOVER; CREDIT UNIONS [V3872280]
CANADA; INVESTMENTS AND ACCOUNTS WITH AFFILIATES; CREDIT UNIONS [V3872340]
CANADA; OPERATING REVENUE, YEAR-OVER-YEAR CHANGE; CREDIT UNIONS [V3872400]
CANADA; OPERATING EXPENSES, YEAR-OVER-YEAR CHANGE; CREDIT UNIONS [V3872460]
CANADA; OPERATING PROFIT, YEAR-OVER-YEAR CHANGE; CREDIT UNIONS [V3872520]
CANADA; PORTFOLIO INVESTMENTS; CREDIT UNIONS [V3872580]
CANADA; LOANS; CREDIT UNIONS [V3872640]
CANADA; MORTGAGE; CREDIT UNIONS [V3872700]

Data Source: *Corporations Returns Act* (ID 2503)

This is an active, direct, mandatory survey employing administrative data sources. The most recent data release is June 2005 for information gathered in 2003. Data is available under this survey back to 1962. The survey is also a census.

The *Corporations Returns Act* (CRA) was formerly known as the *Corporations and Labour Unions Returns Act* (CALURA). CALURA was introduced in 1962, and Statistics Canada has prepared annual reports to Parliament since that time. Parliament officially amended the *Act* in January 1999, deleting the requirement for labour union participation.

This survey is conducted to meet the following requirements:

- to collect financial and other information on the affairs of certain corporations active in Canada
- to evaluate the extent and effects of nonresident ownership and control of corporations in Canada
- to provide information for policy purposes to the Department of Finance; Investment Canada; Industry, Science and Technology Canada; External Affairs; and Public Works and Government Services Canada

Ownership and control information is obtained primarily through ownership returns

filed by corporations liable under the CRA for reference period 1999. Additional ownership information is obtained from both Canadian and international publications. These estimates are derived from the Unified Enterprise Statistics Program (UES) which, in turn, gets its data from three primary sources:

1. annualized data from the Quarterly Survey of Financial Statements (QFS) obtained from the Industrial Organization and Finance Division at Statistics Canada;
2. a survey of provincial or federal government business enterprises (GBE) that operated in the business sector, with data obtained from the Public Institutions Division at Statistics Canada; and
3. administrative corporate taxation data in the form of the General Index of Financial Information (GIFI) obtained from the Tax Data Division at Statistics Canada.

While QFS and GBE data were collected at the enterprise level, GIFI data were gathered at the nonconsolidated, single legal entity level. Data for single legal entities belonging to a corporate family (multi-legals) were then rolled up to the enterprise level.

Corporations included in this report are principally those that are required to file a schedule of ownership information under the *Corporations Returns Act*. The *Act*, as amended 1 January 1999, applies to every corporation doing business in Canada or that is incorporated under a law of Canada or a province, whose gross revenue for the reporting period exceeded \$15 million, or whose assets exceeded \$10 million. In calculating these amounts, each corporation must include the assets and sales of its affiliates as defined in the *Act*. Corporations with assets and sales under these amounts but having long-term debt or equity owing directly or indirectly to nonresidents exceeding a book value of \$200,000 must also provide ownership information.

The concepts and definitions for most industries are based on Canadian Institute of Chartered Accountants (CICA) guidelines. Regulated industries may follow practices and definitions determined by the regulators, although they are usually similar to CICA's Generally Accepted Accounting Principles.

CANSIM II Table 1790002: Corporation and Labour Unions Returns Act (CALURA), Concentration by Control in Individual Industries, 1980–1988

Available Vectors

CANADA; CORPORATIONS; TOP 4 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524310]

CANADA; SALES; TOP 4 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524311]

CANADA; ASSETS; TOP 4 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524312]

CANADA; EQUITY; TOP 4 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524313]

CANADA; PROFITS; TOP 4 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524314]

CANADA; TAXABLE INCOME; TOP 4 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524315]

CANADA; CORPORATIONS; TOP 8 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524316]

CANADA; SALES; TOP 8 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524317]

CANADA; ASSETS; TOP 8 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524318]

CANADA; EQUITY; TOP 8 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524319]

CANADA; PROFITS; TOP 8 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524320]

CANADA; TAXABLE INCOME; TOP 8 FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524321]

CANADA; ENTERPRISES; ALL FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524322]

CANADA; CORPORATIONS; ALL FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524323]

CANADA; SALES; ALL FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524324]

CANADA; ASSETS; ALL FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524325]

CANADA; EQUITY; ALL FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524326]

CANADA; PROFITS; ALL FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524327]

CANADA; TAXABLE INCOME; ALL FOREIGN CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524328]

CANADA; CORPORATIONS; TOP 4 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524329]

CANADA; SALES; TOP 4 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524330]

CANADA; ASSETS; TOP 4 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524331]

CANADA; EQUITY; TOP 4 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524332]

CANADA; PROFITS; TOP 4 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT

UNIONS SINCE 1983 [V524333]
CANADA; TAXABLE INCOME; TOP 4 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524334]
CANADA; CORPORATIONS; TOP 8 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524335]
CANADA; SALES; TOP 8 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524336]
CANADA; ASSETS; TOP 8 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524337]
CANADA; EQUITY; TOP 8 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524338]
CANADA; PROFITS; TOP 8 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524339]
CANADA; TAXABLE INCOME; TOP 8 CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524340]
CANADA; ENTERPRISES; ALL CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524341]
CANADA; CORPORATIONS; ALL CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524342]
CANADA; SALES; ALL CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524343]
CANADA; ASSETS; ALL CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524344]
CANADA; EQUITY; ALL CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524345]
CANADA; PROFITS; ALL CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524346]
CANADA; TAXABLE INCOME; ALL CANADIAN PRIVATE CONTROLLED; BANKS AND CREDIT UNIONS SINCE 1983 [V524347]
CANADA; CORPORATIONS; TOP 4 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524348]
CANADA; SALES; TOP 4 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524349]
CANADA; ASSETS; TOP 4 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524350]
CANADA; EQUITY; TOP 4 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524351]
CANADA; PROFITS; TOP 4 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524352]
CANADA; TAXABLE INCOME; TOP 4 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524353]
CANADA; CORPORATIONS; TOP 8 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524354]
CANADA; SALES; TOP 8 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524355]

CANADA; ASSETS; TOP 8 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524356]

CANADA; EQUITY; TOP 8 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524357]

CANADA; PROFITS; TOP 8 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524358]

CANADA; TAXABLE INCOME; TOP 8 CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524359]

CANADA; ENTERPRISES; ALL CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524360]

CANADA; CORPORATIONS; ALL CALURA SIZE CONTROLLED, INCLUDING GOVERNMENT; BANKS AND CREDIT UNIONS SINCE 1983 [V524361]

CANADA; ENTERPRISES; TOTAL, INCLUDING UNCLASSIFIED; BANKS AND CREDIT UNIONS SINCE 1983 [V524362]

CANADA; CORPORATIONS; TOTAL, INCLUDING UNCLASSIFIED; BANKS AND CREDIT UNIONS SINCE 1983 [V524363]

CANADA; SALES; TOTAL, INCLUDING UNCLASSIFIED; BANKS AND CREDIT UNIONS SINCE 1983 [V524364]

CANADA; ASSETS; TOTAL, INCLUDING UNCLASSIFIED; BANKS AND CREDIT UNIONS SINCE 1983 [V524365]

CANADA; EQUITY; TOTAL, INCLUDING UNCLASSIFIED; BANKS AND CREDIT UNIONS SINCE 1983 [V524366]

CANADA; PROFITS; TOTAL, INCLUDING UNCLASSIFIED; BANKS AND CREDIT UNIONS SINCE 1983 [V524367]

CANADA; TAXABLE INCOME; TOTAL, INCLUDING UNCLASSIFIED; BANKS AND CREDIT UNIONS SINCE 1983 [V524368]

Data Source: Survey of Employment, Payrolls, and Hours (ID 2612)

This is an active survey, with data collected on a monthly basis since 1983. The most recent data release was in June 2005, for detailed information from April 2005. This is a mandatory survey using direct and administrative data sources.

The Survey of Employment, Payrolls, and Hours (SEPH) is produced from the combination of the Business Payroll Survey results and the payroll deductions administrative data received from the Canada Customs and Revenue Agency. It is Canada's only source of detailed information on the total number of paid employees, payrolls, and hours at industrial, provincial, and territorial levels.

The statistics compiled by SEPH are based on a census of administrative records for all in-scope establishments with employees recorded on the Business Register. The total payroll employment estimates and the monthly payrolls are derived from the administrative source.

The Business Payrolls Survey (BPS) is conducted monthly to collect data to estimate SEPH variables not available on administrative records. The BPS uses a stratified simple random sample of 11,000 establishments out of a population of 900,000 businesses on the Business Register, doing a one-twelfth rotation of the sample every month.

The estimates derived from the administrative source are then combined with the results of the BPS to produce estimates for the full range of SEPH variables.

The BPS uses a combination of methods for data collection to permit maximum flexibility for the respondent. For mail units, questionnaires are mailed to the payroll office of employers each month. Computer-assisted telephone interviews are used for respondents who express a preference for being surveyed by phone. Respondents can also report their data electronically. Reporting units that do not respond to the initial mailing are followed up by telephone by staff in Statistics Canada's regional offices. Administrative information for total gross monthly payrolls and the total number of employees for the last pay period in the month are obtained from payroll deduction accounts maintained by the Canada Customs and Revenue Agency. Statistics Canada's Public Institutions Division provides information for general government services at the provincial and federal levels.

CANSIM II Table 2810001: Number of Employees (SEPH) by Type of Employee and Standard Industrial Classification, 1980 (SIC), 1983–2000

Available Vectors

EMPLOYEES; CANADA; ALL EMPLOYEES; CREDIT UNIONS; UNADJUSTED [V249051]
 EMPLOYEES; CANADA; SALARIED; CREDIT UNIONS; UNADJUSTED [V249617]
 EMPLOYEES; CANADA; PAID BY THE HOUR; CREDIT UNIONS; UNADJUSTED [V250179]
 EMPLOYEES; QUEBEC; ALL EMPLOYEES; CREDIT UNIONS; UNADJUSTED [V274397]
 EMPLOYEES; QUEBEC; SALARIED; CREDIT UNIONS; UNADJUSTED [V274921]
 EMPLOYEES; QUEBEC; PAID BY THE HOUR; CREDIT UNIONS; UNADJUSTED [V275441]
 EMPLOYEES; BRITISH COLUMBIA; ALL EMPLOYEES; CREDIT UNIONS; UNADJUSTED
 [V307123]

CANSIM II Table 2810002: Average Weekly Earnings of Employees (SEPH), 1983–2000

Available Vectors

DOLLARS; CANADA; ALL EMPLOYEES; INCLUDING OVERTIME; CREDIT UNIONS;
 UNADJUSTED [V250741]
 DOLLARS; CANADA; SALARIED; INCLUDING OVERTIME; CREDIT UNIONS; UNADJUSTED
 [V251303]

DOLLARS; CANADA; PAID BY THE HOUR; INCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V251865]

DOLLARS; CANADA; ALL EMPLOYEES; EXCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V252427]

DOLLARS; CANADA; SALARIED; EXCLUDING OVERTIME; CREDIT UNIONS; UNADJUSTED
[V252989]

DOLLARS; CANADA; PAID BY THE HOUR; EXCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V253551]

DOLLARS; QUEBEC; ALL EMPLOYEES; INCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V275961]

DOLLARS; QUEBEC; SALARIED; INCLUDING OVERTIME; CREDIT UNIONS; UNADJUSTED
[V276481]

DOLLARS; QUEBEC; PAID BY THE HOUR; INCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V277001]

DOLLARS; QUEBEC; ALL EMPLOYEES; EXCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V277521]

DOLLARS; QUEBEC; SALARIED; EXCLUDING OVERTIME; CREDIT UNIONS; UNADJUSTED
[V278041]

DOLLARS; BRITISH COLUMBIA; ALL EMPLOYEES; INCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V308531]

DOLLARS; BRITISH COLUMBIA; SALARIED; INCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V308999]

DOLLARS; BRITISH COLUMBIA; PAID BY THE HOUR; INCLUDING OVERTIME; CREDIT
UNIONS; UNADJUSTED [V309467]

DOLLARS; BRITISH COLUMBIA; ALL EMPLOYEES; EXCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V309935]

DOLLARS; BRITISH COLUMBIA; SALARIED; EXCLUDING OVERTIME; CREDIT UNIONS;
UNADJUSTED [V310403]

DOLLARS; BRITISH COLUMBIA; PAID BY THE HOUR; EXCLUDING OVERTIME; CREDIT
UNIONS; UNADJUSTED [V310871]

CANSIM II Table 2810003: Standard Work Week/Hours (Excluding Overtime) of Salaried Employees
(SEPH), 1983–2000

Available Vectors

HOURS; CANADA; CREDIT UNIONS [V254113]
HOURS; QUEBEC; CREDIT UNIONS [V279081]
HOURS; BRITISH COLUMBIA; CREDIT UNIONS [V311339]

CANSIM II Table 2810004: Average Hourly Earnings and Average Weekly Hours of Employees Paid by the
Hour (SEPH), 1983–2000

Available Vectors

CANADA; INCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS;
UNADJUSTED [V254675]

- CANADA; INCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS;
UNADJUSTED [V255237]
- CANADA; EXCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS;
UNADJUSTED [V255799]
- CANADA; EXCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS;
UNADJUSTED [V256361]
- QUEBEC; INCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS;
UNADJUSTED [V279601]
- QUEBEC; INCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS;
UNADJUSTED [V280121]
- QUEBEC; EXCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS;
UNADJUSTED [V280641]
- QUEBEC; EXCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS;
UNADJUSTED [V281161]
- BRITISH COLUMBIA; INCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS;
UNADJUSTED [V311807]
- BRITISH COLUMBIA; INCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT
UNIONS; UNADJUSTED [V312275]
- BRITISH COLUMBIA; EXCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS;
UNADJUSTED [V312743]
- BRITISH COLUMBIA; EXCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT
UNIONS; UNADJUSTED [V313211]

CANSIM II Table 2810005: Number of Employees (SEPH) by Type of Employee and Standard Industrial Classification, 1980 (SIC), 1983–2000

Available Vectors

- EMPLOYEES; CANADA; ALL EMPLOYEES; CREDIT UNIONS [V249334]
- EMPLOYEES; CANADA; SALARIED; CREDIT UNIONS [V249898]
- EMPLOYEES; CANADA; PAID BY THE HOUR; CREDIT UNIONS [V250460]
- EMPLOYEES; QUEBEC; ALL EMPLOYEES; CREDIT UNIONS [V274659]
- EMPLOYEES; QUEBEC; SALARIED; CREDIT UNIONS [V275181]
- EMPLOYEES; QUEBEC; PAID BY THE HOUR; CREDIT UNIONS [V275701]
- EMPLOYEES; BRITISH COLUMBIA; ALL EMPLOYEES; CREDIT UNIONS [V307359]
- EMPLOYEES; BRITISH COLUMBIA; SALARIED; CREDIT UNIONS [V307829]
- EMPLOYEES; BRITISH COLUMBIA; PAID BY THE HOUR; CREDIT UNIONS [V308297]

CANSIM II Table 2810006: Average Weekly Earnings of Employees (SEPH), 1983–2000

Available Vectors

- DOLLARS; CANADA; ALL; INCLUDING OVERTIME; CREDIT UNIONS [V251022]
- DOLLARS; CANADA; SALARIED; INCLUDING OVERTIME; CREDIT UNIONS [V251584]
- DOLLARS; CANADA; PAID BY THE HOUR; INCLUDING OVERTIME; CREDIT UNIONS
[V252146]

DOLLARS; CANADA; ALL; EXCLUDING OVERTIME; CREDIT UNIONS [V252708]
DOLLARS; CANADA; SALARIED; EXCLUDING OVERTIME; CREDIT UNIONS [V253270]
DOLLARS; CANADA; PAID BY THE HOUR; EXCLUDING OVERTIME; CREDIT UNIONS
[V253832]
DOLLARS; QUEBEC; ALL; INCLUDING OVERTIME; CREDIT UNIONS [V276221]
DOLLARS; QUEBEC; SALARIED; INCLUDING OVERTIME; CREDIT UNIONS [V276741]
DOLLARS; QUEBEC; PAID BY THE HOUR; INCLUDING OVERTIME; CREDIT UNIONS
[V277261]
DOLLARS; QUEBEC; ALL; EXCLUDING OVERTIME; CREDIT UNIONS [V277781]
DOLLARS; QUEBEC; SALARIED; EXCLUDING OVERTIME; CREDIT UNIONS [V278301]
DOLLARS; QUEBEC; PAID BY THE HOUR; EXCLUDING OVERTIME; CREDIT UNIONS
[V278821]
DOLLARS; BRITISH COLUMBIA; ALL; INCLUDING OVERTIME; CREDIT UNIONS [V308765]
DOLLARS; BRITISH COLUMBIA; SALARIED; INCLUDING OVERTIME; CREDIT UNIONS
[V309233]
DOLLARS; BRITISH COLUMBIA; PAID BY THE HOUR; INCLUDING OVERTIME; CREDIT
UNIONS [V309701]
DOLLARS; BRITISH COLUMBIA; ALL; EXCLUDING OVERTIME; CREDIT UNIONS [V310169]
DOLLARS; BRITISH COLUMBIA; SALARIED; EXCLUDING OVERTIME; CREDIT UNIONS
[V310637]
DOLLARS; BRITISH COLUMBIA; PAID BY THE HOUR; EXCLUDING OVERTIME; CREDIT
UNIONS [V311105]

CANSIM II Table 2810007: Standard Work Week/Hours (Excluding Overtime) of Salaried Employees
(SEPH), 1983–2000

Available Vectors

HOURS; CANADA; CREDIT UNIONS [V254394]
HOURS; QUEBEC; CREDIT UNIONS [V279341]
HOURS; BRITISH COLUMBIA; CREDIT UNIONS [V311573]

CANSIM II Table 2810008: Average Hourly Earnings and Average Weekly Hours of Employees Paid
by the Hour (SEPH), 1983–2000

Available Vectors

CANADA; INCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS [V254956]
CANADA; INCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS
[V255518]
CANADA; EXCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS [V256080]
CANADA; EXCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS
[V256642]
QUEBEC; INCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS [V279861]
QUEBEC; INCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS
[V280381]

QUEBEC; EXCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS [V280901]

QUEBEC; EXCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT UNIONS
[V281421]

BRITISH COLUMBIA; INCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS
[V312041]

BRITISH COLUMBIA; INCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT
UNIONS [V312509]

BRITISH COLUMBIA; EXCLUDING OVERTIME; AVERAGE WEEKLY HOURS; CREDIT UNIONS
[V312977]

BRITISH COLUMBIA; EXCLUDING OVERTIME; AVERAGE HOURLY EARNINGS; CREDIT
UNIONS [V313445]

Data Source: Financial Flow Accounts (ID 1804)

This is an active survey conducted on a quarterly basis, with data available since 1962. Data is a sample of the Canadian economy and is derived.

The Financial Flow Accounts (FFA) show the financing of economic activity as measured in the System of National Accounts; they are an extension of the Income and Expenditure Accounts. In any given period, funds must be raised to finance some proportion of expenditure, and financial investments result from current income. Economic production implies financial activity and intermediation. The transactions measured in the FFA highlight these relationships and also illustrate how the various sectors interact in this economy-wide framework of sources and uses of funds.

The Financial Flow Accounts show capital movements between lending and borrowing sectors. They present the transactions in financial assets and liabilities, which are at the core of the saving and investment decisions in the economy. For the economy as a whole, savings equal investment, and the change in total financial assets equals the change in total liabilities. Data are shown for forty-two sectors and subsectors of the Canadian economy and broken down by type of financial instrument.

The System of National Accounts provides a conceptually integrated framework of statistics and analysis for studying the state and behaviour of the Canadian economy. The accounts are centred on the measurement of activities associated with the production of goods and services, and the sales of goods and services in final markets.

Survey divisions provide data in aggregate form, and in some instances, on a

company or enterprise basis. Such data come either in the form of balance sheet levels or with the flows already calculated. In the former instance, flows are derived from the previous level. Data are categorized, checked, compiled, analysed, and compared with other sources of economic information. For further information on definitions, concepts, sources, and methods, please refer to Statistics Canada's "Guide to the Financial Flow and Balance Sheet Accounts," catalogue no. 13-585-XPE.

CANSIM II Table 3780001: Financial Flows, Sector Flows, 1961-2002

Available Vectors

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; GROSS SAVING AND CAPITAL TRANSFERS [V32175]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CAPITAL CONSUMPTION ALLOWANCES [V32176]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; SAVING [V32177]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NONFINANCIAL INVESTMENT [V32178]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; FIXED CAPITAL [V32179]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; EXISTING ASSETS [V32180]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NET LENDING OR BORROWING [V32181]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NET FINANCIAL INVESTMENT [V32182]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NET TRANSACTIONS IN FINANCIAL ASSETS [V32183]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CORPORATE CLAIMS [V32184]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; SHARES [V32185]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; FOREIGN INVESTMENTS [V32186]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER FINANCIAL ASSETS [V32187]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CURRENCY AND BANK DEPOSITS [V32188]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; DEPOSITS IN OTHER INSTITUTIONS [V32189]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; FOREIGN CURRENCY DEPOSITS [V32190]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CONSUMER CREDIT [V32191]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER LOANS [V32192]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CANADA SHORT-TERM PAPER [V32193]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER SHORT-TERM PAPER [V32194]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; MORTGAGES [V32195]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CANADA BONDS [V32196]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; PROVINCIAL BONDS [V32197]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; MUNICIPAL BONDS [V32198]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER CANADIAN BONDS [V32199]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NET TRANSACTIONS IN LIABILITIES [V32200]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CORPORATE CLAIMS [V32201]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER LIABILITIES [V32202]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; DEPOSITS IN OTHER INSTITUTIONS [V32203]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; BANK LOANS [V32204]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER LOANS [V32205]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER CANADIAN BONDS [V32206]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; SECTOR DISCREPANCY [V32207]

Data Source: National Balance Sheet Accounts (ID 1806)

This is an active, sample-derived survey conducted on an annual basis, with data available since 1961. Survey divisions provide data in aggregate form, and in some instances, on a company or enterprise basis. Such data come either in the form of balance sheet levels or as estimates of capital stocks of nonfinancial assets. Data are categorized, checked, compiled, analysed, and compared with other sources of economic information. For further information on definitions, concepts, sources, and methods, please refer to Statistics Canada's "Guide to the Financial Flow and Balance Sheet Accounts," catalogue no. 13-585-XPE.

CANSIM II Table 3780004: National Balance Sheet Accounts, by Sectors, 1961-2001

Available Vectors

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; TOTAL ASSETS [V33859]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NONFINANCIAL ASSETS [V33860]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NONRESIDENTIAL STRUCTURES [V33861]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; MACHINERY AND EQUIPMENT [V33862]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; LAND [V33863]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; NET FINANCIAL ASSETS [V33864]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; LIABILITIES AND NET WORTH [V33865]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; TOTAL FINANCIAL ASSETS [V33866]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CORPORATE CLAIMS [V33867]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; SHARES [V33868]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; FOREIGN INVESTMENTS [V33869]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER FINANCIAL ASSETS [V33870]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CURRENCY AND BANK DEPOSITS [V33871]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; DEPOSITS IN OTHER INSTITUTIONS [V33872]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; FOREIGN CURRENCY DEPOSITS [V33873]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CONSUMER CREDIT [V33874]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER LOANS [V33875]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CANADA SHORT-TERM PAPER [V33876]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER SHORT-TERM PAPER [V33877]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; MORTGAGES [V33878]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CANADA BONDS [V33879]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; PROVINCIAL BONDS [V33880]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; MUNICIPAL BONDS [V33881]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER CANADIAN BONDS [V33882]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; TOTAL LIABILITIES [V33883]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; CORPORATE CLAIMS [V33884]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER LIABILITIES [V33885]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; DEPOSITS IN OTHER INSTITUTIONS [V33886]

DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; BANK LOANS [V33887]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER LOANS [V33888]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES; OTHER CANADIAN
BONDS [V33889]
DOLLARS; CANADA; M2+ DEPOSITS AT TRUST AND MORTGAGE LOAN COMPANIES,
CAISSES POPULAIRES AND CREDIT UNIONS [V37216]
DOLLARS; CANADA; TOTAL, CREDIT UNIONS AND CAISSES POPULAIRES [V37239]
DOLLARS; CANADA; TAX SHELTERED DEPOSITS AT CREDIT UNIONS AND CAISSES
POPULAIRES [V37242]
DOLLARS; CANADA; CREDIT UNIONS AND CAISSES POPULAIRES SHARE CAPITAL,
ADJUSTMENT TO M2+ [V37251]

Data Source: Farm Debt Outstanding

CANSIM II Table 20008: Farm Debt Outstanding, Classified by Lender, 1971–2001

Available Vectors

DOLLARS; CANADA; CREDIT UNIONS [V383174]
DOLLARS; PRINCE EDWARD ISLAND; CREDIT UNIONS [V383175]
DOLLARS; NEWFOUNDLAND; CREDIT UNIONS [V383176]
DOLLARS; NOVA SCOTIA; CREDIT UNIONS [V383177]
DOLLARS; NEW BRUNSWICK; CREDIT UNIONS [V383178]
DOLLARS; QUEBEC; CREDIT UNIONS [V383179]
DOLLARS; ONTARIO; CREDIT UNIONS [V383180]
DOLLARS; MANITOBA; CREDIT UNIONS [V383181]
DOLLARS; SASKATCHEWAN; CREDIT UNIONS [V383182]
DOLLARS; ALBERTA; CREDIT UNIONS [V383183]
DOLLARS; BRITISH COLUMBIA; CREDIT UNIONS [V383184]

Voluntary Sector Initiative

www.vsi-isbc.ca/

The Voluntary Sector Initiative (VSI) is a five-year collaborative project between the Government of Canada and the voluntary sector that aims to address the key issues of funding, policy dialogue, technology, volunteerism, and research. The key goal of the initiative, however, is the improvement of quality of life in Canada.

The VSI defines the voluntary sector as the 180,000 nonprofit organizations (including 80,000 registered charities) and other nonincorporated groups operating in Canada. This definition encompasses organizations that serve a public benefit and depend primarily on

volunteers, support from other individuals, and limited influence from government. The organizations encompassed under the VSI definition are wide ranging and include community associations, volunteer organizations, advocacy groups, recreation associations, and so on. Also included in the mandate are co-operatives, which makes this initiative of particular interest.

The VSI defines a voluntary organization as:

an organization whose work depends on serving a public benefit; on volunteers at least for its governance; on some financial support from individuals; and on limited direct influence by governments, other than in relation to any tax benefits accruing to the organization. We use the term to include both registered charities and public benefit organizations, which at present do not qualify for registration under the *Income Tax Act*; but we would exclude from the definition large institutions such as museums, universities and colleges, and hospitals (even though they are registered charities), and nonprofit organizations which have corporate numbers and commercial related interests (such as trade associations).²

According to this definition, the VSI encompasses co-operative societies under its mandate.

Satellite Account of Nonprofit Institutions and Volunteering

A project under the VSI is to create a Satellite Account of Nonprofit Institutions and Volunteering, which is being undertaken through Statistics Canada's System of National Accounts and will become a permanent data collection initiative. The goal of the satellite account is to highlight the nonprofit sector's economic contribution in Canada and to enable a deeper understanding of its interaction with other sectors of the Canadian economy. Data sources for this satellite account include:

From Canada Revenue:

- T2 Corporate Income Tax Return Data
- T3010 Registered Charity Information Return Data
- T1044 Nonprofit Organisation Information Return Data
- T4 Supplementary Files Data
- GST/HST Public Service Bodies Rebate Files

2. Voluntary Sector Initiative, *Building on Strength: Improving Governance and Accountability in Canada's Voluntary Sector* (Ottawa: Voluntary Sector Initiative, 1999), p. 121 (see www.vsr-trsb.net/pagvs/Book.pdf).

From Statistics Canada:

- Business Register Files

The account will include the following types of information:

- a definition of the voluntary sector
- classification of activities, deliverables, objectives, and institutions
- sources and uses of funds
- financial assets and liabilities
- labour supply
- physical assets
- details on users, investors, and transfer recipients
- management structures
- annual and sub-annual indicators
- local and national perspectives

At the present time, data on co-operatives has not been compiled for the Satellite Account of Nonprofit Institutions and Volunteering. This is because, according to the international definition, co-operatives fall out of the scope of the nonprofit sector, but are included in the larger scope of the social economy. Although they may consider including co-operatives in the future, they have no immediate plans to do so.

Data collection contact: Catherine Bertrand, Chief, Nonprofit Sector and Unpaid Work Analysis, Statistics Canada, catherine.bertrand@statcan.ca, (613) 951-4115

National Survey of Nonprofit and Voluntary Organizations

In addition to the satellite account, the VSI is collaborating with Statistics Canada on the National Survey of Nonprofit and Voluntary Organizations (NSNVO). The Canadian Centre for Philanthropy (www.nonprofitscan.ca) is acting as project head, under contract to Human Resources and Development Canada. Between March and June 2003, fourteen thousand nonprofit and voluntary organizations were surveyed to help determine their numbers in Canada; major activity areas; financial health; human resource capacity; and structural capacity. The final report, titled *Cornerstones of Community*, is available at www.nonprofitscan.ca/research_at_CCP.asp?page=NSNVO#section2.

The survey frame for this project was created by linking the following:

- the Business Register
- records of charities registered with the Canada Customs and Revenue Agency
- records of nonprofit filing returns with the Canada Customs and Revenue Agency
- files from provincial and territorial governments and Industry Canada of nonprofit organizations registered under their respective jurisdictions

The NSNVO looks at registered and incorporated nonprofits and charities, but does not specifically segment the data for co-operatives. The data collection contact does not believe this data can be extracted from the study.

Data collection contact: Kim Turner, Manager, Library Services, Canadian Centre for Philanthropy, kturner@ccp.ca

CO-OPERATIVE SECTOR ASSOCIATIONS/ORGANIZATIONS

Canadian Co-operative Association (CCA)

www.coopscanada.coop

The *Concern for Community Survey* (which can be found at www.coopscanada.coop/newsletter/CSR/index.html), done in conjunction with the Conseil Canadien de la Coopération and the Co-operatives Secretariat, examines the level and type of community involvement among Canadian co-operatives. The questionnaire (www.coopscanada.coop/pdf/newsletter/CFC/2002_Questionnaire.pdf) went to more than seven thousand co-operatives in Canada. Approximately five hundred were returned unopened (wrong address or no longer in business). More than eight hundred co-ops in ten provinces and one territory responded and 770 surveys were included in the analysis. The response rate was approximately 12 percent.

The data was aggregated nationally and disaggregated and analysed according to province; rural versus urban location; language; co-operative activity (sector); type of co-op

based on membership structure (i.e., consumer, producer, worker, multistakeholder, and federation); and size. Summary statistics can be found at the following site: www.coopscanada.coop/newsletter/CSR/index.html#Methodology.

In its attempt to collect statistics on the social involvement of co-operatives in Canada, this survey provides some information that is not normally gathered and that would be useful to the co-operative sector, as it highlights potential ways for the sector as a whole to differentiate itself from the competition.

The response rate of 12 percent was disappointing. One would expect that a survey administered by a national umbrella organization owned by its members and working for the sector's best interests would have generated a much higher response rate.

Data collection contact Brenda Heald spoke to the unwillingness of co-operatives to share data when she commented on the CCA's Information Clearinghouse. One of the original intentions of the clearinghouse was to maintain listings of co-operative boards of directors, but they had difficulty getting this information even from member co-operatives. Overall, the clearinghouse has fallen into disrepair and is not being regularly updated.

Aside from these negative comments, Heald spoke about a new initiative intended to address the lack of information on "innovation" statistics — e.g., the number of newly created co-operatives, success rates, cluster densities, and the rates of job creation. The CCA will be launching a national advisory services program for co-operative development, which may assist in data collection on these topics.

Data collection contact: Brenda Heald, Manager of Corporate and Member Communications, CCA, brenda@coopscanada.coop, 1-866-266-7677, ext. 211

Conseil Canadien de la Coopération (CCC)

www.ccc.coop

The CCC collects some statistics on Francophone co-operatives in the country, including information on the number of co-operatives, number of employees, leaders, assets, and volume of business per province. The data is housed in the CCC's annual report, copies of which are available on request.

Data collection contact: Denise Audet-Gravel, info@ccc.coop, (613) 789-5492

PART THREE

Statistics on the Cooperative Sector in the United States

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STATISTICS ON THE COOPERATIVE SECTOR IN THE UNITED STATES¹

HISTORICAL STATISTICS

United States Census Bureau

Historical statistics on cooperatives in the United States are available in the *Bicentennial Edition: Historical Statistics of the United States, Colonial Times to 1970*, published by the US Department of Commerce, Bureau of the Census (Washington, D.C., 1975). Information includes:

- list of cooperatives (total, marketing, purchasing)
- estimated memberships (total, marketing, purchasing)
- estimated business, in dollars (total, marketing, purchasing)
- number of cooperatively owned electric utilities (1940–1970)

Please note that prior to 1940, cooperatives were included as “other publicly-owned.”

FEDERAL STATISTICS

Board of Governors of the Federal Reserve System

Flow of Funds Accounts of the United States

The data held in these publications are strictly economic in nature and the only cooperative sector they pertain to is credit unions. They do not release the sources of these statistics

1. Please note that this section uses the American spelling for cooperative throughout so there is no inconsistency between references to individual cooperative organizations and other general references in the text.

online. The “Guide to the Flows of Funds Accounts,” which tells of the data sources used, is available only in paper format from the Board of Governors of the Federal Reserve System for US\$20.

Annual Releases (1945–2002)

www.federalreserve.gov/releases/Z1/Current/data.htm

Quarterly Releases (12 September 1996 – 9 June 2005)

www.federalreserve.gov/releases/Z1/

Financial information on credit unions includes:

- net borrowing and lending in credit markets
- credit market borrowing by financial sectors
- gross savings
- fixed non-residential investment
- net acquisition of financial assets
- net increase in liabilities
- checkable deposits and currency
- time and savings deposits
- federal funds and security repurchase agreements
- open market paper
- treasury securities
- agency securities
- mutual funds shares
- other loans and advances
- total mortgages
- home mortgages
- consumer credit
- total miscellaneous financial claims
- identified miscellaneous financial claims
- unidentified miscellaneous financial claims
- sector discrepancies

Energy Information Administration

Electric Power Annual (2001–03)

www.eia.doe.gov/cneaf/electricity/public/pub_sum.html

This document continues summary data from the old series on *Financial Statistics of Major US Publicly Owned Electric Utilities* outlined immediately above. It includes revenue and expense statistics for US cooperative borrower owned electric utilities, 1992–2003. Detailed information is also available in database files on the Internet.

Electric Trade in the US (1996)

tonto.eia.doe.gov/bookshelf/index.html

The PDF document on the above website contains lengthy tables detailing:

- number of utilities by class of ownership
- purchases by cooperative borrowers
- electricity purchases by the power supply segment of cooperative borrowers
- electricity purchases by the distribution segment of cooperative borrowers by state
- electricity purchases by electrical cooperatives not reported to the rural utilities service by state

Financial Statistics of Major US Publicly Owned Electric Utilities (2000)

www.eia.doe.gov/cneaf/electricity/public/pub_sum.html

This series, covering data from 1994–2000, has been discontinued, but summary data beginning in 2001 is available in the new *Electric Power Annual* on the same site (see below).

Information available includes:

- five years of summary financial data and current-year detailed financial data on the major publicly owned electric utilities
- selected electric utility by class of ownership (investor owned, publicly owned, cooperative, federal, total)
- Appendix A: summary statistics of US rural electric cooperative borrowers
- income statement of US cooperative borrowers
- balance sheets for US cooperative borrowers
- operation and maintenance expenses
- number of consumers, sales, and operating revenue for US cooperative distributor borrowers

Inventory of Electric Utility Power Plants in the United States (2000)

www.eia.doe.gov/cneaf/electricity/public/pub_sum.html

- existing capacity at US electric utilities by class of ownership, census division, and state, 2000

- existing generating units at US electric utilities by state, company, and plant, 2000
- US electric utility plants by state, 2000

National Center for Education Statistics

Institute of Education Sciences
US Department of Education
nces.ed.gov

- contacted to enquire about the nature of data collection methods, but no response

Library Statistics Program

nces.ed.gov/surveys/libraries

The Library Cooperatives Survey, collected in 1997, was a survey of about four hundred library cooperatives by the International Archive of Education Data, a project sponsored by the National Center for Education Statistics, the primary federal entity for collecting and analyzing data related to education in the United States and other nations. Data areas include:

- type of organization
- geographic area served
- type of service to the general public (direct, indirect)
- cooperative membership
- operating income
- operating expenditures
- capital expenditures
- cooperative services such as reference, ILL, training, consulting, Internet access, electronic access, statistics, preservation, union lists, public relations, cooperative purchase, delivery, advocacy, and outreach programming.

There is no data online.

National Credit Union Administration (NCUA)

NCUA Individual Credit Union Data

www.ncua.gov/indexdata.html

Statistics presented on the NCUA website, the *Individual Credit Union Data*, include data derived from 5,300 call reports for federally insured credit unions, except for the contact in-

formation section, which is kept confidential. The section also excludes the net worth classification for periods prior to when NCUA collected the alternative risk-based net worth. This particular page also excludes any information that the NCUA may have on natural person nonfederally insured credit unions.

Statistics for federally insured credit unions for prior cycles may be available in hard copy under the *Freedom of Information Act*; contact foia@ncua.gov for data availability and price.

Individual credit union data files include the following:

- database of individual-level information
- assets, members, and charter number
- financial performance reports for each credit union (1990–2005)
- liabilities, shares, and equity
- income and expenses
- loan information
- miscellaneous information

Statistics for Federally Insured Credit Unions

www.ncua.gov/ReportsAndPlans/statistics/statistics.html

Statistics are available from year end 1996 to year end 2004, including:

- consolidated balance sheet for federally insured credit unions
- supplemental loan data
- distribution of borrowings, savings, and investments
- one hundred largest credit unions
- number of credit unions by state
- assets by state

Data collection contact: Todd Roscoe, Data Analysis Officer, National Credit Union Administration, troscoe@ncua.gov, (703) 518–6386

United States Census Bureau

American FactFinder Industry Quick Report

factfinder.census.gov/servlet/IQRTable?_bm=y&-ds_name=EC0200A1&-NAICS2002=522130&-_lang=en

Credit Unions NAICS 522130

- number of establishments
- number of employees
- annual payroll
- shipments/sales/receipts
- population estimate

American Housing Survey

www.census.gov/hhes/www/housing.html

The American Housing Survey (AHS), a sample of housing units in the United States active since 1973, is conducted by the Census Bureau for the Department of Housing and Urban Development. It used to be conducted every five years, but since 1981, the time frame has been every odd-numbered year; the 1985–2003 biannual publications are online. The AHS samples an average of 55,000 housing units each survey, returning to the same units year after year, recording changes in characteristics, and adding and deleting units when applicable. This cross-sectioning of the housing inventory gives a picture of houses and households as they change over long periods of time.

Data on cooperative housing units has been deliberately lumped with condominium data due to confidentiality reasons and cannot be extracted from the public-use files. Because there are so few housing cooperatives in the US and they are mainly clustered in a single geographic region (New York), it would be possible to identify the cooperatives in the survey.

The only data available to the public is that which is online. This data would be useful for time-series studies on cooperative (and condominium) housing units; data variables are identical year-to-year from 1993–2003. Examples include:

Table 1.A.1: Introductory Characteristics — All Housing Units (Tables also for owner-occupied units, renter units, Black householder, Hispanic householder, elderly householder)

- total units
- seasonal units
- year round
- occupied
- vacant

Table 1.A.7: Financial Characteristics — All Housing Units (Tables also for owner-occupied units, renter units, Black householder, Hispanic householder, elderly householder)

- condominium and cooperative fee (combined stats)

Table 2.1: Introductory Characteristics — Occupied Units (Tables also for renter units, Black householder, Hispanic householder, elderly householder)

- coop statistics separate
- tenure
- housing unit characteristics (new construction, manufactured/mobile homes, physical problems (severe/moderate))
- household characteristics (Black, Hispanic, elderly, moved in past year, below poverty level)

Table 2.11: Reasons for Move and Choice of Current Residence — Occupied Units (Tables also for renter units, Black householder, Hispanic householder, elderly householder)

- to be converted to condominium or cooperative

Table 2.25: Units in Structure by Selected Characteristics — Occupied Units (Tables also for renter units, Black householder, Hispanic householder, elderly householder)

- coop statistics are separate

Data collection contact: Barbara Williams, Methodology Section, Housing and Household Statistics, United States Census Bureau, (301) 763-5523

Legal Form of Organization

landview.census.gov/epcd/www/smallbus.html

In this publication, cooperatives are aggregated with estates, receiverships, and businesses classified as unknown legal form of organization. The source is the 1997 Economic Census.

Table 4: Employer and Nonemployer Firms by Legal Form of Organization, 1997

Firm Type	All		Employers			Nonemployers	
	Firms (thous)	Receipts (\$bil)	Firms (thous)	Receipts (\$bils)	Employees (thous)	Firms (thous)	Receipts (\$bil)
All types of firm	20822	18553	5295	17908	103360	15527	645
C Corporations	2390	13892	1870	13801	10982	520	91
Subchapter S Corporations	1979	2977	1517	2920	21446	462	57
Partnerships	1226	622	341	523	3918	885	98
Individual Proprietorships	15123	872	1497	475	5699	13655	396
Others, including cooperatives, estates, receiverships, and business classified as unknown legal forms of organization	103	190	99	188	1315	3	2

1997 Economic Census

Note: three-quarters of the projected sixteen hundred publications from the 2002 Economic Census to be issued 2004 through 2006 are available online at www.census.gov/econ/census02.

Economic Census coverage is virtually economy wide, although it does not capture the agricultural, fisheries, and forestry industries. It includes businesses that produce 84 percent of all US goods and services, business activities that take place at some 23 million separate locations and in more than 50,000 localities across the nation.

To conduct the Economic Census, the Census Bureau obtains information about each of these businesses every five years, summarizes it by kind of business and geographic area, and publishes the information in printed and electronic form. Businesses are classified by three criteria: 1) their locations; 2) the primary activity in each location; and 3) the industry classification of the primary activity.

To save very small businesses the expense and effort of filling out census questionnaires, the bureau uses administrative records provided by the Internal Revenue Service (IRS) and the Social Security Administration (SSA) to obtain basic information for approximately 1.5 million small-employer and 14 million nonemployer businesses.

Since 1810, the first time an economic census was conducted in the United States, there has been an evolution in data gathered, an expansion in scope of business activity measured, an increase in systematization of data processing, and increasing standardization of formats for data presentation and dissemination. One of the more important of these changes was the 1997 adoption of the North American Industrial Classification System (NAICS), which replaced the old Standard Industrial Classification (SIC). The NAICS provides for more standardized information between NAFTA countries, thus allowing for greater comparability between the countries involved.

Despite the adoption of the NAICS, it will only be possible to derive NAICS data for approximately two-thirds of SIC 4-digit code industries, either because the industries have not been changed or because new industries are subdivisions of an old industry form. Some industries, however, were significantly altered or removed (see “How NAICS Will Affect Data Users” at: www.census.gov/epcd/www/naicsusr.html).

Industrial categories for which cooperative data may be available before 1997, such as retail and wholesale trades, credit unions, and electric, gas, and utilities, do not appear to be affected by the change from SIC to NAICS. The credit union category continues between SIC and NAICS and has been part of the census since 1987, when credit unions were distinguished from banks in the economic census.

In terms of actual US coop sector data in the 1997 Economic Census, some of the industries are having their form of ownership recorded in the census forms sent out to businesses (see www.census.gov/epcd/www/pdf/97wh/wh5141.pdf for an example of the cooperative form of ownership). Industries where this is happening include electric and gas utilities and the retail and wholesale trades. With the exception of the wholesale trade data (below), cooperative business data is not a part of the public reports.

Credit union data from the Economic Census is primarily financial in nature, with no statistics on the number of members, locations, etc. The Credit Union National Association's statistics and/or the National Credit Union Administration's reports (both described below) would thus be more useful as a data source for the American credit union sector.

Time-series data on the cooperative information captured in this census may be difficult if not impossible to create. Although the complete 1997 Economic Census reports are available online, comparative data for the 1992 census is quite limited (see www.census.gov/epcd/www/92result.html). An examination of online sample forms for the 2002 Economic Census is not encouraging, with the only industry for which cooperative as a form of organization is provided being the grocery wholesale sector. Other industries for which cooperative organization was indicated in the 1997 Economic Census (i.e., retail and electric and gas utilities) do not have a similar indication on the 2002 forms.

Numerous attempts to contact the Census Bureau to enquire about the availability of earlier census data and whether it was possible to extract cooperative organizations from the datasets met with no response.

It is difficult to determine the value of the data derived from this census. While it captures a large percentage of the businesses in the United States, it does so only every five years, and it is not comprehensive for the cooperative sector. The 1997 census collected data

on only prominent coop industries in the US — retail, wholesale, credit union, and electric — but did not collect any information in other sectors such as health care, housing, and agriculture.

1997 Economic Census, Establishment and Firm Size

www.census.gov/prod/lec97/97w42-sz.pdf

- including legal form of organization

1997 Economic Census, Wholesale Trade Subject Series

www.census.gov/prod/lec97/97w42-sm.pdf

Statistical Abstract of the United States (1995–2005)

www.census.gov/prod/www/statistical-abstract-02.html (2001–2004/05)

www.census.gov/prod/www/statistical-abstract-us.html (1995–2002)

The relevant data in these publications again relates to credit unions in the United States.

This data was derived from the National Credit Union Administration, the government agency responsible for federally insured credit unions in the United States.

- flow of funds accounts: financial assets of financial and nonfinancial institutions by holder sector (credit union stats included)
- selected financial institutions — number and assets by asset size
- summary of federal and state-chartered credit unions (operating credit unions, number of failed institutions, members, assets, loans outstanding, savings — each broken down by federal vs. state)
- mutual fund shares — holdings and net purchases by type of investor (credit union category)

United States Department of Agriculture (USDA)

Agricultural Statistics 1994–2005

www.usda.gov/nass/pubs/agr05/acro05.htm

Numerous PDF publications are available on the website, including information such as:

- taxes, insurance, credit, and cooperatives
- number of cooperatives, type, members, and business
- business volume of marketing, farm supply, and related service cooperatives
- number of cooperatives by state, members, and net business

USDA — Rural Business Cooperative Service

The Rural Business Cooperative Service (RBS) is the only federal agency collecting comprehensive information on the nonfinancial cooperative sector. Unfortunately, the focus of this department is the agricultural sector and the majority of its data collection is restricted to farmer cooperatives.

Cooperatives in International Trade (1997)

www.rurdev.usda.gov/rbs/pub/cir127.pdf

- charts and tables on agricultural exports, type of concentration of exports, foreign sourcing strategies

Farm Marketing, Supply and Service Cooperative Historical Statistics

Cooperative Information Report 1, Section 26

rurdev.usda.gov/rbs/pub/cir1s26.pdf

This data has been collected annually since 1929, and according to the publication, it is representative of all cooperatives in the United States. The Rural Business Cooperative Service defines farmer-owned coops as those where membership is limited to producers of agricultural and aquacultural products. In addition, members are limited to one vote and the business conducted with nonmembers must not exceed the value of that done with members.

Published statistics on agricultural cooperatives are based on type of data and time periods. Annual data are for business years ending during calendar years listed. Annual data from 1951 through 1977 are for the fiscal year 1 July through 30 June. Data for 1978 through 2002 are based on the calendar year.

Data for 1913 and 1915 were compiled from two sources: USDA Bulletin 547, pages 14–25, issued in 1917; and USDA Technical Bulletin 40, pages 70–75, issued in 1928. Data for 1924 were taken from Department Bulletin 1302, page 25. Data for the remaining years were taken from various statistical reports published by the Farm Credit Administration and/or the United States Department of Agriculture.

Information for the 1936–37 year was compiled from a door-to-door survey conducted by the Farm Credit Administration working with twelve district banks for cooperatives and thirty-three state agricultural colleges. Year periods begin 1 July and end the next 30 June. Beginning with 1978, data were changed to calendar year.

After the 1975–76 survey, cooperative reclassification was completed and 688 associations were dropped. Of those, 570 were primarily marketing associations and 118 were farm supply associations. Thus, the 1976–77 statistics on number of cooperatives indicates a greater than usual decline. In 1989, cotton ginning cooperatives were reclassified as service cooperatives.

Also included for the years 1970–2002 are statistics on the number of marketing, farm supply, and related service cooperatives removed from RBS’s list of cooperatives and the reasons for their removal, whether they went out of business, merged or consolidated with another cooperative, were acquired by another firm, or ceased operations for other unknown reasons.

Data on full-time employees were collected in 1981, 1986, and 1991; beginning with 1994, data were collected annually.

Other information collected includes:

- number, membership, and gross volume of marketing, farm supply, and related service cooperatives 1913–2002
- cooperatives organized by type, 1957–2002
- cooperatives grouped by gross business volume, 1976–2002
- business volume by commodity and state, 1993–2001
- assets, liabilities, and net worth, 1954–2002

Farmer Cooperative Statistics (2002)
www.rurdev.usda.gov/rbs/pub/service.htm

The information was collected from individual farmer and fishery cooperatives by a mail survey of all organizations identified by USDA’s Rural Business-Cooperative Service (RBS) as a farmer or aquacultural cooperative. Information was requested for the cooperatives’ 2002 business year. Statistics for all cooperatives were derived by adding data estimated for nonrespondents to respondent data. Data from respondents and other sources accounted for 87.6 percent of the total gross sales of farmer cooperatives in 2002.

The statistics include detailed data on the following:

- number of cooperatives
- memberships

- employees
- labor expenses
- business size
- business volume
- net income
- balance sheet
- selected financial ratios
- other service cooperatives

Time-Series Data

The publicly available data online remains fairly constant over time, with a few exceptions such as periodic changes to the tables related to cooperatives' major business activities. Nonetheless, the data would be useful, for instance, for tracking changes in cooperative assets over time.

Comparability to Canadian Data

Comparing the information collected by this survey of American farmer cooperatives to the data collected in the Canadian Co-operatives Secretariat's publication *Co-operatives in Canada* presents a number of difficulties. The largest hurdle is that the Canadian data includes cooperatives from all nonfinancial sectors, while data from the USDA is limited to farmer cooperatives. In addition, both datasets fill in missing values using estimates, which makes them somewhat unreliable.

It may be possible, however, to compare some basic financial statistics such as volume of business between Canadian and American cooperatives, if supply and marketing data for Canadian coops is aggregated, because this is the way cooperatives are reported in the American datasets. But a word of caution is required: combining Canadian cooperative categories would insert additional errors into the data. As well, what is included in "other" categories in each publication would be too difficult to compare.

It would be easier to compare data between the two countries if it were possible to obtain special data runs from the Co-operatives Secretariat. It is quite likely that they would be able to extract directly comparable cooperatives from their database, as they have already done this for a study on the socioeconomic impact of Aboriginal cooperatives in Canada. If

this were the case, it is possible that other information besides business volumes might be directly comparable; otherwise, comparing the datasets from the publications is too difficult.

In addition to agricultural cooperatives, the RBS also collects a few data items on fishery cooperatives, but it has never collected information on forestry cooperatives. It is possible that RBS collects data on other types of nonagricultural cooperatives, though inquiries to this effect met with no response.

Data collection contact: Eldon Eversull, eldon.eversull@usda.gov

Financial Statistics of Largest Dairy Cooperatives (1980–95)
www.rurdev.usda.gov/rbs/pub/rr164.pdf

- number of dairy cooperatives
- milk sales and share of milk marketed off-farm, 1950–95
- common size balance sheet for major dairy cooperatives, 1980–95

Full Time Employees, Sales, Assets of Selected Farmer Cooperatives (1994)
www.rurdev.usda.gov/rbs/pub/rr129.pdf

- number of full-time employees, sales, assets of 509 farmer cooperatives in 1981, 1986, and 1991

STATE STATISTICS

The researcher contacted a number of state legislatures or studied their websites with respect to cooperative data collection. While some states did appear to be collecting data, others had no knowledge of this type of activity. Responses/findings are noted below. Data collection across the states was so variable and time consuming that this search could not be done in more detail.

South Carolina Statistical Abstracts

www.ors2.state.sc.us/abstract/chapter3/banking2.asp

One table from the 2005 statistical abstracts is titled Credit Union Growth in South Carolina (1989–2002) and lists numbers of credit unions, members, shares, loans, and assets.

Virginia Statistical Abstracts

www3.ccps.virginia.edu/demographics/statistical_abstract/section06toc.html

Virginia's Statistical Abstracts list two tables with credit union data:

- The 25 Largest Federally-Insured Credit Unions in Virginia, 2003
- Consolidated Balance Sheet Statistics for Federally Insured Credit Unions in the US, Virginia and Surrounding States, 2002

OTHER ORGANIZATIONS

The Cooperative Grocer

Human Resources Survey (2002)

www.cooperativegrocer.coop/articles/index.php?id=393

- sixty-nine cooperatives (seventy-three stores)
- hourly pay for coop managers
- employee turnover rate by store size (chart, percentage)
- median days of paid time off for full-time and part-time employees by store size (chart)
- board performance (chart) as rated by respondents — indicators: monitors against policy; ensures good governance; has linkages; initiates own work; policy agendas; policy framework; adherence to policies
- average number of members and percentage of gross sales to members (chart)

Retail Operations Survey (1999–2002)

www.cooperativegrocer.coop/cg_topics.html

- net income
- expense and gross margin trends
- statistics on service departments
- occupancy
- percent of sales to members
- annual sales per member
- lifetime member investment
- voluntary survey, approximately one hundred coops respond per year

Credit Union Economics Group

www.cueg.org

Formed in 2003, the Credit Union Economics Group (CUEG) is comprised of senior credit union officials with economic and/or financial backgrounds. The group shares a joint interest in providing the nation's credit unions with a strategic view on both the general economy and consumer financial services.

CUEG membership consists of individuals who work with credit-union-specific issues on a day-to-day basis and are familiar with the strategic planning issues facing credit unions. Group members are committed to providing credit unions with both national and regional macroeconomic information in the form of bi-annual regional reports and economic consensus forecasts on principal credit union and economic trends. Reports cover details such as lending, member shares, earnings and asset quality, competition and operational concerns, member concerns and economic conditions, returns on average assets, etc. There are some charts and graphs.

Credit Union National Association (CUNA)

www.cuna.org

CUNA data is compiled from state and federal credit union regulator data, with all the data on federally insured credit unions being compiled from the National Credit Union Administration (NCUA). When it is available, they also use NCUA data for the state chartered credit unions; otherwise, they rely on the state data. Although the data has been collected since 1939, the NCUA has only been in existence since 1970, and the data collection contact does not know the source of the older sets of statistics. He is also doubtful that any present CUNA employee would be aware of these sources either.

The only currently available data on all credit unions in the country is that which is available from CUNA, notably the data presented on the website and in other publications such as Operating Ratios and Spreads. If federally insured credit unions are of particular interest, the NCUA provides data. If more customized data runs are necessary, CUNA will do these for US\$150.

Annual Credit Union Data

advice.cuna.org/econ/cu_stats.html#mbrbenefits

- historical asset quality by asset size and region
- long-run trends, aggregates, by state, 1939–present

Credit Union/Bank Comparisons

advice.cuna.org/econ/cu_stats.html#mbrbenefits

- frequently requested credit union/bank comparisons
- commercial banks and credit unions: facts, fallacies, and recent trends
- state by state bank/credit union overviews
- state by state credit union member benefits
- curia: state by state bank/credit union member business loan comparisons

Credit Union Reports

advice.cuna.org/econ/cu_stats.html#mbrbenefits

- some credit union statistics, varying years up to 2005
- some useful charts, 1990–2004

Monthly Credit Union Data

advice.cuna.org/econ/cu_stats.html#mbrbenefits

The estimates in this report are based on information from a monthly sample of credit unions and are revised whenever more complete data are available. At time of writing, the estimates reflect benchmark data as of June 2005. There are many charts and tables dealing with items such as:

- distribution of credit union savings
- distribution of credit union loans
- credit union liquidity flows
- distribution of surplus funds
- credit union capital ratio and delinquency
- credit union market shares
- national credit union aggregates
- national credit union loan data
- national credit union income and expense ratios
- credit union and household savings market data
- credit union and consumer credit market data

Research and Statistics Section

www.cuna.org/data/cu/research/cu_stats.html

Data collection contact: Marc Shafroth, mshafroth@cuna.coop

Filene Research Institute

www.filene.org

The Filene Research Institute examines vital issues affecting the future of credit unions and consumer finance. Through this unique, nonprofit organization, leading scholars and consultants analyze managerial problems, public policy questions, and consumer needs. It has a number of useful publications available for sale to nonmembers at prices ranging from US\$75 to \$125 (see summaries at www.filene.org/pubslst_all.php). Titles include:

Enhancing the Performance of Senior Credit Union Management Teams, 2005

Who Uses Credit Unions, 2004

Member Satisfaction Levels: National Norms for Comparing Local Survey Results, 2002

National Association of Federal Credit Unions

www.nafcunet.org

The Credit Union Trend Reports, most recently updated in June 2005 (www.nafcunet.org/Content/NavigationMenu/Economic_Trends_Analysis/Credit_Union_Trend_Reports/Credit_Union_Trend_Reports.htm), include downloadable PDF files covering the following information:

- key financial ratios: federal credit unions
- key financial ratios: federal credit unions by NCUA region, 1998–2005
- top one hundred federal credit unions by total assets
- top twenty federal credit unions, loan growth
- top twenty federal credit unions, share growth
- top twenty federal credit unions, loan-to-share ratio
- key federal credit union trends
- National Association of Federal Credit Unions/highline data net spread analysis report (available for purchase at online store)

National Cooperative Bank

www.ncb.coop

NCB's Top 100 Coops (accessible at www.co-op100.coop/top100.asp) lists the top one hundred cooperatives in the United States, broken down by sector. Available statistics include total

revenue and total assets for the years 2003 and 2004. The researcher contacted the NCB to inquire about data collection techniques but received no reply.

National Cooperative Business Association

www.ncba.coop

The NCBA provides little statistical information online. There is a web page with listings of various statistics (e.g., credit union numbers, assets of larges coops), but it does not appear to be systematically collected and data sources are not given. The researcher contacted the organization about data collection but got no response.

National Rural Electric Cooperative Association

Electric Utility Comparisons

www.nreca.org/nreca/About_Us/Our_Members/Statistics/Statistics

- compares investor owned, publicly owned, and cooperative utilities (most recent update, April 2005)
- number of organizations
- number of total customers
- customers as percent of total
- revenues as percent of total
- sales (residential, commercial, industrial)
- miles of distribution line
- customers per mile of line
- revenue per mile of line
- distribution plants per customer
- assets
- equity

University of Wisconsin Center for Cooperatives

www.wisc.edu/wvcc/

While the Center for Cooperatives is not actively collecting cooperative statistics in the United States, the researcher contacted the center's extension outreach specialist Greg Lawless (lawless@ae.wisc.edu (608) 265-2903) because of his in-depth knowledge of the coop sector in that country.

In terms of data collection on nonagricultural cooperatives, Mr. Lawless believes that the National Cooperative Business Association may collect some data from its members, but to his knowledge it is not public. The National Cooperative Bank, which traditionally makes loans to nonagricultural cooperatives, collects and reports on some general coop industry data each year, and may also collect data from coops with whom it has outstanding loans.

With respect to state-level data, there is tremendous variability in state statutes and support for cooperatives. Although Wisconsin requires that cooperatives report to the state each year, Mr. Lawless is not certain whether the report includes the names of board members. His impression is that very few, if any, states collect coop statistics on a regular basis. Wisconsin used to do so, but stopped in the 1980s. In 1991 and 1999 the Center for Cooperatives took it upon themselves to collect data for Wisconsin cooperatives.

His general impression of data collection on cooperatives is that Canada, Europe, possibly India, and many other countries are much more systematic about collecting cooperative statistics. The USDA has done a fair bit of it over the years for the agricultural sector, but beyond that it is fairly limited. He feels that credit unions in the United States are another story altogether. As lending institutions, they are watched more closely by the government. In Wisconsin, for example, they are required by law to provide data to the state government twice per year.

World Health Organization

newdeal.feri.org/pr/pr09.htm

Puerto Rico in the Great Depression, 1940, from the Puerto Rico Reconstruction Administration *Annual Report*, year ended 30 June 1940. The attached table lists name of cooperative, year organized, financing agency, products, members, amount invested, and annual business.

WEBSITES

Federal Websites

Agency for International Development

www.usaid.gov

Board of Governors of the Federal Reserve System

www.federalreserve.gov

Bureau of Economic Analysis

www.bea.doc.gov

Bureau of Justice Statistics

www.ojp.usdoj.gov/bjs/

Bureau of Labor Statistics

www.bls.gov

Census Bureau

www.census.gov

Comptroller of the Currency

www.occ.treas.gov

Council of Economic Advisors

www.whitehouse.gov/cea

Department of Agriculture

www.usda.gov

Department of Commerce

www.commerce.gov

Department of Energy

www.doe.gov

Department of Health and Human Services

www.os.dhhs.gov

Department of Housing and Urban Development
www.hud.gov

Department of Justice
www.usdoj.gov

Department of Labor
www.dol.gov

Department of the Treasury
www.ustreas.gov

Employment and Training Administration
www.doleta.gov

Energy Information Administration
www.eia.doe.gov

Farm Credit Administration
www.fca.gov

Federal Deposit Insurance Corporation
www.fdic.gov

FedStats
www.fedstats.gov

FirstGov
www.firstgov.gov

General Services Commission
www.gsa.gov

Internal Revenue Service
www.irs.gov

Library of Congress
www.loc.gov

National Agricultural Statistics Service
www.nass.usda.gov

National Credit Union Administration
www.ncua.gov

Office of Justice Programs
www.ojp.usdoj.gov

Office of Thrift Supervision
www.ots.treas.gov

Rural Development/Business and Cooperative Programs

www.rurdev.usda.gov/rbs

Rural Development/Utilities Programs

www.rurdev.usda.gov/rus

Small Business Administration

www.sbaonline.sba.gov

Stat-USA

www.stat-usa.gov

State Websites

(From Statistical Abstract of the United States)

Alaska Department of Commerce, Community and Economic Development

www.dced.state.ak.us

California Department of Finance

www.dof.ca.gov

Connecticut Department of Economic and Community Development

www.ct.gov/ecdl

Delaware Economic Development Office

www.state.de.us/dedo

Idaho Commerce and Labor

cl.idaho.gov/portall

Indiana Business Research Center, Kelley School of Business, Indiana University

www.ibrc.indiana.edu

Kentucky Cabinet for Economic Development, Research and Statistics

www.thinkkentucky.com/kyedc/resandstat.asp

Maine Department of Economic and Community Development

www.econdevmaine.com

Massachusetts Institute for Social and Economic Research

www.umass.edu/miser

Minnesota Department of Employment and Economic Development

www.deed.state.mn.us/

Minnesota State Demographic Center

www.demography.state.mn.us/

Montana Department of Commerce, Census and Economic Information Center
ceic.commerce.state.mt.us/

Nebraska Department of Economic Development
info.neded.org

Nelson A. Rockefeller Institute of Government, State University of New York
www.rockinst.org

Nevada Department of Administration, Budget and Planning
www.budget.state.nv.us

New Hampshire Office of Energy and Planning
www.nh.gov/oep

New Jersey State Data Center, New Jersey Department of Labor
and Workforce Development
www.wnjin.net/OneStopCareerCenter/LaborMarketInformation/njsdc/njsdcwho.html

North Carolina Office of State Budget and Management, Data Services Unit
data.osbm.state.nc.us/

North Dakota Department of Commerce
www.ndcommerce.com

Ohio Department of Development, Office of Strategic Research
www.odod.state.oh.us/research

Oregon Secretary of State, Archives Division
arcweb.sos.state.or.us/

Pennsylvania State Data Center, PA Stats
pasdc.hbg.psu.edu/pasdc/PA_Stats/pa_stats.html

Rhode Island Economic Development Corporation, RI DataBank
www.riedc.com/riedc/ri_databank/

South Carolina Budget and Control Board, Office of Research and Statistics
www.ors.state.sc.us

State of Hawaii Department of Business, Economic Development and Tourism,
Research and Economic Analysis Division
www.hawaii.gov/dbedt/stats.html

State of Washington Office of Financial Management, Forecasting Division
www.ofm.wa.gov/forecasting/sitemap.htm

Texas Almanac
www.texasalmanac.com

Towson University (Maryland) Division of Economic and Community Outreach,
RESI Research and Consulting
wwwnew.towson.edu/outreach/resi

University of Alabama Center for Business and Economic Research
cber.cba.ua.edu/

University of Arizona, Economic and Business Research Center,
Eller College of Management
www.ebr.eller.arizona.edu

University of Arkansas at Little Rock, Institute for Economic Advancement
www.aiea.ualr.edu

University of Colorado at Boulder Government Publications Library
www.colorado.edu/libraries/govpubs/online.htm/

University of Florida, Bureau of Economic and Business Research
www.bebr.ufl.edu

University of Georgia Center for Agribusiness and Economic Development
www.georgiastats.uga.edu/

University of Georgia Selig Center for Economic Growth
www.selig.uga.edu/

University of Idaho Small Business Development Center
www.idahosbdc.org

University of Illinois at Urbana-Champaign Bureau of Economic and Business Research
www.business.uiuc.edu/research/

University of Kansas Policy Research Institute
www.ku.edu/pril

University of Missouri-Columbia, Economic and Policy Analysis Research Center
econ.missouri.edu/eparcl

University of New Mexico Bureau of Business and Economic Research
www.unm.edu/~bber/

University of New Orleans, College of Business Administration,
Division of Business and Economic Research
www.business.uno.edu/dber/

University of Oklahoma, Price College of Business, Center for Economic
and Management Research
cemr.ou.edu/cemr/index.asp

University of South Dakota Business Research Bureau
www.usd.edu/brbinfo

University of Tennessee, College of Business Administration, Center for Business
and Economic Research, Tennessee State Data Center
cber.bus.utk.edu/tnsdc/sdcmain.htm

University of Utah, David Eccles School of Business,
Bureau of Economic and Business Research
www.business.utah.edu/go/bebr/

University of Virginia, Weldon Cooper Center for Public Service,
Demographics and Workforce
www.coopercenter.org/demographics/

Utah Foundation
www.utahfoundation.org

Vermont Labor Market Information, Department of Labor
www.vtlmi.info

West Virginia University, Bureau of Business and Economic Research,
College of Business and Economics
www.bber.wvu.edu

Wisconsin State Legislature, Legislative Reference Bureau
www.legis.state.wi.us/lrb/bb/

Wyoming Department of Administration and Information, Economic Analysis Division
eadiv.state.Wy.us/

Other Websites

Advisory Commission on Intergovernmental Relations
www.library.unt.edu/gpo/ACIR/Default.html

Alabama Cooperative Extension System
www.aces.edu/

American Financial Services Association
www.americanfinsvcs.com

America's Community Bankers
www.acbankers.org

Arizona Cooperative Extension
ag.arizona.edu/extension/

Arthur Capper Cooperative Center, Kansas State University
www.agecon.ksu.edu/accc

Association of Corporate Credit Unions
www.theaccu.org

BankSearch
www.banksearch-consultancy.com/

Bureau of National Affairs
www.bna.com

Chronicle of Higher Education
chronicle.com

Clemson University Cooperative Extension
www.clemson.edu/extension/

Colorado State University Cooperative Extension
www.ext.colostate.edu/

Common Cooperative Financial Statements
www.cdsus.coop/cocofist.html

Consumer Federation of America
www.consumerfed.org

Cooperative Grocer
www.cooperativegrocer.coop

CHF International (Cooperative Housing Foundation)
www.chfhq.org/

Cornell University Cooperative Extension
www.cce.cornell.edu

Council of State Governments
www.csg.org/CSG/default.htm

Credit Union National Association
www.cuna.org

Dow Jones & Company
www.dj.com

Dun and Bradstreet Corporation (D&B as of 2001)
www.dnb.com

Edison Electric Institute
www.eei.org

Editor & Publisher

www.editorandpublisher.com

Euromonitor International

www.euromonitor.com

Filene Research Institute

www.filene.org

Food and Agriculture Organization of the United Nations

www.fao.org

Food Marketing Institute

www.fmi.org

Food Products Association

www.fpa-food.org

Fortune Datastore

www.fortune.com/fortune/datastore/index.html?fds

Foundation for Rural Service

www.frs.org

Illinois Cooperative Council

www.siu.edu/departments/coagr/iccc/welcome.html

Illinois Institute for Rural Affairs

www.iira.org

Inter-American Development Bank

www.iadb.org

International City/County Management Association

www.icma.org

International Cooperative Alliance

www.ica.coop

International Labour Office

www.ilo.org

International Monetary Fund

www.imf.org

Iowa Institute for Cooperatives

www.iacoops.org/

National Association of Federal Credit Unions

www.nafcu.org

National Cooperative Business Association

www.ncba.coop

National Cooperative Grocers Association

www.ncga.coop

National Council of Farmer Cooperatives

www.ncfc.org/

National Federation of Community Development Credit Unions

www.natfed.org

National Rural Electric Cooperative Association

www.nreca.org

National Rural Utilities Cooperative Finance Corporation

www.nrucfc.org

National Telecommunications Cooperative Association

www.ntca.org

North American Students of Cooperation

www.nasco.coop

North Carolina Cooperative Extension

www.ces.ncsu.edu

Organisation for Economic Co-operation and Development

www.oecd.org

Penn State Cooperative Extension and Outreach

www.extension.psu.edu/

Progressive Grocer

www.progressivegrocer.com

Purdue Extension

www.ces.purdue.edu/

Quentin Burdick Center for Cooperatives

www.ag.ndsu.nodak.edu/qbcc

Rural Cooperatives Center, University of California, Davis

www.cooperatives.ucdavis.edu

Rutgers Cooperative Research and Extension

www.rce.rutgers.edu

South Dakota State University Cooperative Extension Service

sdces.sdstate.edu/

Texas Cooperative Extension
texasextension.tamu.edu/

Thomson Gale
www.galegroup.com

UConn Cooperative Extension System (University of Connecticut)
www.canr.uconn.edu/ces/

United Nations Statistics Division
www.un.org/databases/index.html

United States Public Interest Research Group
www.uspirg.org

United States Telecom Association
www.usta.org

University of Delaware Cooperative Extension
ag.udel.edu/extension

University of Florida Extension
www.ifas.ufl.edu/extension/ces.htm

University of Georgia Cooperative Extension
www.caes.uga.edu/extension/

University of Idaho Extension
www.uidaho.edu/ag/extension/

University of Kentucky Cooperative Extension Service; Kentucky State University
Cooperative Extension Program
www.ca.uky.edu/county/

University of Maine Cooperative Extension
www.umext.maine.edu

University of Maryland Cooperative Extension
www.agnr.umd.edu/MCE/index.cfm

University of Nebraska, Lincoln, Extension
extension.unl.edu

University of Nevada Cooperative Extension
www.unce.unr.edu/

University of New Hampshire Cooperative Extension
ceinfo.unh.edu/

University of Rhode Island Cooperative Extension

www.uri.edu/cel/index1.html

University of Wisconsin Center for Cooperatives

www.wisc.edu/uwcc

University of Wisconsin Extension

www.uwex.edu/

University of Wisconsin-Madison Center for Credit Union Research

wiscinfo.doit.wisc.edu/ccur/

University of Wyoming Cooperative Extension Service

uwadmnweb.uwyo.edu/UWces/

Virginia Cooperative Extension

www.ext.vt.edu/

Washington State University Extension

ext.wsu.edu/

World Almanac

www.worldalmanac.com

World Council of Credit Unions

www.woccu.org

World Health Organization

www.who.int

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SOURCES OF OTHER BUSINESS STATISTICS

INTRODUCTION

THE MOST RELEVANT SOURCES OF DATA for businesses are trade and industry associations of which a business is a member; the associations are geared towards the industry in which the company conducts its business. The companies often make use of surveys to collect data on their members, who usually do not have to pay to gain access to the information. If the information is accessible to the public at all, nonmembers will be required to pay for it.

Research or consulting firms provide other useful data sources, although like the associations mentioned above, most do not differentiate between co-operative and other types of business statistics. Companies such as Dun and Bradstreet (D&B) or ACNielsen, for example, are well known for their comprehensive business databases that span many industries. There is often a steep fee, however, for access to their databases, which may be out of the price range of most businesses. Sources for these databases are broad and include government documents, primary data collection, industry statistics, and so on. In addition to firms that collect data on a wide variety of industries, there are others that specialize in specific industries, such as finance, retail, oil and petroleum, etc. There is normally a fee to gain access to this information.

Sources of industry statistics also include government data collection agencies such as Statistics Canada. While this agency conducts most data collection in Canada, other departments such as the Bank of Canada, Finance Canada, Agriculture and Agri-Food Canada, and the National Energy Board collect their own data as needed. While some of the information collected by these agencies is accessible to the public, there is a fee for specialized data compilations. The general public has to pay for Statistics Canada services and

publications, for example, unless data is directly accessible online or through a library or other institution.

Because sources of business data are so vast, the researcher narrowed her search to the industries in which the Centre for the Study of Co-operative's Social Cohesion project partners operate.¹ Information on federally incorporated co-operatives is easily accessible in Industry Canada's Strategis Canadian Company Capabilities database (strategis.ic.gc.ca/sc_coinf/ccc/engdoc/homepage.html), which lists general information on federally incorporated companies in Canada, including the company's North American Industrial Classification System (NAICS) industry code. The NAICS codes for co-operatives are listed below.

Co-op Atlantic	311119 — other animal food manufacturing
	418990 — all other wholesale distributors
	418310 — agricultural feed wholesaler-distributors
CUC Manitoba	522112 — corporate and institutional banking industry
Federated Co-operatives Ltd.	416310 — general line building supplies-wholesaler-distributors
	324110 — petroleum refineries
	413120 — dairy and milk products wholesaler-distributors
	413130 — poultry and egg wholesaler-distributors
	413150 — fresh fruit and vegetable wholesaler-distributors
	416330 — hardware wholesaler-distributors
Arctic Co-operatives Ltd.	813910 — business associations

Other NAICS codes for SHHRC project research partners not in the Canadian Company Capabilities database could include:

Calgary Co-op	44511 — supermarkets and other grocery (except convenience) stores
	45291 — warehouse clubs and superstores
Mountain Equipment Co-op	451110 — sporting goods stores
Prince Albert Co-op	44511 — supermarkets and other grocery (except convenience) stores
CUC Saskatchewan	522112 — corporate and institutional banking industry
Gimli CU	52213 — local credit unions
Prince Albert CU	52213 — local credit unions
South Interlake CU	52213 — local credit unions

1. The project is a five-year national study titled "Co-operative Membership and Globalization: Creating Social Cohesion through Market Relations" funded by the Social Sciences and Humanities Research Council of Canada (SSHRC) and scheduled for completion in 2007. The project includes many community-based partners; for more information please go to www.socialcohesion.coop.

RESEARCH/DATA FIRMS — GENERAL

ACNielsen

www.acnielsen.ca

ACNielsen is a worldwide research firm that specializes in providing products and services to manufacturers, retailers, and brokers in the global consumer packaged goods industry and the consumer products and services industry.

The Canadian division of ACNielsen has items that serve Canadian businesses in the consumer products industry. ACNielsen's Market Track, a scan-based database, for example, provides market-share and volume data to enable clients to see market trends and opportunities. Clients can use this to determine sources of competitor growth, the distribution of specific products, and average price trends. Other products include:

Fresh Track

- provides consumer sales information through point-of-sales scanning data for fresh meat, produce, deli, and bakery products

Key Account Reports

- gives access to weekly sales volume and causal information for food categories or brands
- available retailer information for key account reports includes Sobeys Inc.; Overwaitea Food Group; PetroCanada; Loblaw Companies Ltd.; Metro Richelieu; A and P Co.; Calgary Co-op; Esso; Jean Coutu; Uniprix; Federated Co-op; Safeway; HY Louie Co.; Co-op Atlantic; Zellers; and Shoppers Drug Mart

Acumen Research

www.acumenresearch.com

Acumen Research specializes in consumer loyalty and relationship management. They will do focus groups for companies, conduct satisfaction surveys, compile information on market

trends and perceptions and buying behaviours, as well as doing loyalty relationship assessment, benchmarking, and branch or region comparisons. Services and products include:

ConsumerEyes (2000, 2002)

- a survey to investigate customer loyalty and store relationships
- the 2002 version of the survey expanded to assess loyalty in the financial services sector in Canada, including Canadian banks and credit unions; this would be useful in identifying the relative strengths and weaknesses of these institutions
- one has to pay to gain access to this data

Canadian Business Resource

www.cbr.ca

CBR is a subscriber-based business directory database that provides information on more than six thousand businesses in Canada. Included in each company profile is the company's contact information, officers' and directors' names, a brief company description, financial data, Standard Industrial Classification (SIC) codes, links to press releases, and stock and investment information. Information comes from questionnaires distributed to private and public companies by mail or fax. Other company information is collected from annual reports, newspaper releases, and general Internet research.

Data collection contact: Brian Gilligan, publisher@bluebook.ca

Conference Board of Canada

www.conferenceboard.ca

The Conference Board of Canada has a database titled Weblinx, a subscription-based information source that houses varied data analyses and surveys. Examples include forecast analysis data for Canada, the provinces, and metropolitan areas; consumer attitude and business confidence data; and historical data from government agencies.

D&B (formerly Dun and Bradstreet)

www.dnb.ca

D&B is the world's largest business database. The Canadian national database comprises about 1.25 million Canadian businesses, over 70 percent of which are small companies (defined as less than \$1 million in sales or ten employees or fewer).

Information in this database includes marketing, history, operations (line of business, number of employees, location/facilities), financial data (statement, starting capital, sales projection, trends), and public records (suits, liens, judgements, business failures, and media items). Sources for this information include payment data, business principles, news and media, courts and legal filing offices, customers, the Internet, company financial information, and other third parties. Dun and Bradstreet uses SIC codes for Canadian industries in services, mining, construction, manufacturing, transportation/utilities, wholesale, retail, and public administration.

The company charges fees for access to their information. The cost of a comprehensive company report, for example, is approximately CAN\$160.00. As a side note, Canadian co-operatives — e.g., FCL, MEC, Co-op Atlantic, and credit unions — are listed in their business database.

Deloitte

www.deloitte.ca

Deloitte conducts market research, including services such as strategy/cross-industry research (outsourcing, content management, collaborative commerce); economic research (consumer confidence, deflation, business cycle); oil and gas industry outlooks (corporate reserve base, expected mergers, acquisitions, restructuring); and consumer business (examples of research, mergers and acquisitions in the food industry, data and franchise management).

Economy.com

www.economy.com

Economy.com is an American research firm that conducts studies for businesses worldwide. Its research includes country analysis, financial markets, industrial markets, regional markets, and economic forecasting at many levels. Many of its data products are compilations of government statistics. Economy.com's Canadian statistics database, Canadian National, for example, provides access to Statistics Canada data. The firm also has research reports available for purchase that cover a range of industries, including food retail, industry, and so on, focussed on the US economy. Subscription costs are approximately US\$600.

Economy.com's activities fall into either research or consulting services. The former includes the data products and research reports described above. The latter includes client presentations, consumer credit analysis, economic development analysis, market analysis, and product forecasting, all done on an individual client basis for a fee.

Euromonitor

www.euromonitor.com

Euromonitor provides global business intelligence and strategic market analysis. Their products and services include:

- Consumer industry market reports and online databases
 - includes brand and company market shares, and future market outlook and sales forecasts
- Client-driven research
 - competition intelligence and benchmarking
 - market analysis, trends monitoring, market entry
 - marketing and promotional strategies
 - mergers and acquisitions intelligence
 - statistical analysis and data modeling

Reports available for purchase from Euromonitor that have a focus on Canadian business include *Gas Station Retailing in Canada* and *Retailing in Canada*. Various other markets in Canada are included, although not the banking and finance sectors. The average cost of a publication is US\$560 and more.

Also available from Euromonitor is online, subscription-based access to world marketing data and statistics on the Internet, which provides macro data for 205 countries.

Hoover's Online

www.hoovers.com

Hoover's has a database of 12 million companies both public and private in more than six hundred industries worldwide (FCL is included in its business listings). Hoover's eighty industry experts gather information directly from companies, then verify and supplement their primary research with information from reputable sources such as national news publica-

tions, local dailies, trade periodicals, government documents, and online data sources. The company's own proprietary database contains more than forty thousand records on the largest, fastest growing, and most influential companies in the US and abroad. Hoover's experts choose companies for inclusion in this database based on their own in-depth understanding of industries as well as consumer insight. The company's primary coverage goals are:

- all publicly traded companies on US exchanges
- the Nasdaq Small Cap Market
- companies that are leaders by revenue market share, technology or industry contribution
- government institutions with significant industry influence
- businesses with powerful founders or backers, such as the Bill and Melinda Gates Foundation

There are an additional 12 million company records available through Hoover's parent company, Dun and Bradstreet (D&B).

While it is possible to search Hoover's database for free, the search provides only basic information such as the contact person, industry information, and the name of the CEO. Access to more detailed information, such as business lists from the D&B database, or Mergent databases, is available only on a subscription basis.

Data collection contact: Sarah Nghan, Customer Support Representative,
snyhan@hoovers.com, (512) 374-4500

LexisNexis

www.nexis.com

Nexis.com, a division of LexisNexis, provides subscription-based business information.

Products include:

- Industry dossier (US based)
 - gathers data from other sources
 - allows user to monitor market intelligence
- Company dossier (global focus)
 - contains overview information, financials, competitive information, executive information, subsidiaries list, docket listings, litigation trends, litigation risks,

- trademarks, access to court documents, summaries of cases and commentaries, inside/outside counsel, auditor, bank information
- has Canadian information
- includes data sources such as the Canadian Business Directory, CanCorp Plus, Company Intelligence International, D&B Market Identifiers, and Worldscope International Company profiles

Standard and Poor's

www.standardpoors.com

Compustat Data provides data collection, standardization, and presentation. It has a population of about 5,400 securities, industry surveys (comprised of US data), market insight, impartial company, industry, country, commentary, index information, and research. Netadvantage database (www.netadvantage.standardpoors.com) is a subscription-based database that provides private and public company information.

Other products include:

Compustat North America

- financial information for the United States and Canada
- original company sources and other data sources
- standardized by financial statement and specific data item definition; information is comparable across companies, industries, time periods, and sectors
- company data includes descriptions, income statement, balance sheet, cash flow, and supplemental data
- companies in this database trade on a US or Canadian exchange

Corporation Records

- twelve thousand publicly held US, Canadian, and international companies
- includes full income statements and balance sheets, corporate profiles, equity and fixed income descriptions, recent news, shareholder reports, SEC reports, newspaper articles, press releases, officers and directors, subsidiaries, and divisions

Corporate Tracker

- tracks mergers and acquisitions and name changes back to 1966

Market Insight

- online access to financial information and research

Merger Stat

- extensive mergers and acquisitions coverage
- data back to 1992 on more than sixty thousand transactions

Thomson

www.thomson.com

Thomson covers the business information and news sectors and the financial services industry. The company gathers information from other business sources and is a marketing research depository that includes broker reports and international company listings.

Business Market Research

Companies can subscribe to business databases such as Dialog Profound, which provides access to market research reports, financial reports, statistical data, and information on mergers and acquisitions, patents, and trademarks. The Dialog Profound system consists of market research reports and Newsroom, which is a compilation of newspaper, trade, and wire search information. On the traditional Dialog service (Dialoglink, DialogClassicweb, DialogWeb) there is access to files on mergers and acquisitions and public company information. Most of this type of coverage is gleaned from public company SEC filings (American). Market research report and analyst report sources include Frost and Sullivan, Datamonitor, and Investtext. In addition, Dialog Tradestat gives access to government statistics, and provides access to market share information, trade flow information, and price fluctuations.

Financial Services Industry Products

Agency IRChannel provides access to Thomson's global database of share ownership, financial contacts, and capital markets intelligence, including company stock ownership. Thomson ONE Banker provides access to quotes, earnings estimates, transaction data, corporate filings, ownership profiles, and research from industry sources for more than sixty thousand domestic and international companies.

Data collection contact: Sheila Johnson, Subject Specialist, Business and News, Dialog Corporation, sheila.johnson@thomson.com, (919) 461-7253

RESEARCH/DATA FIRMS — INDUSTRY SPECIFIC

Canadian Energy Research Institute*www.ceri.ca*

The Canadian Energy Research Institute (CERI) is a nonprofit research institute formed by private and public industry interests, including provincial ministries of energy, corporate sponsors from the energy industry, and others. Its stated mission is to provide relevant, independent, and objective economic research and education in energy and environmental issues to benefit business, government, academia, and the public. CERI research publications are available for purchase. Major sectors include oil, natural gas, the environment, and industry. Reports on the oil industry, for example, include examinations of the cost and supply of crude oil, energy scenarios for the twenty-first century, producer surveys and deliverability outlooks, and crude oil production outlooks.

Canadian Industrial Energy End-Use Data and Analysis Centre*www.cieedac.sfu.ca*

The Canadian Industrial Energy End-Use Data and Analysis Centre (CIEEDAC) facilitates access to data on energy consumption in Canadian industry; monitors the quality of that data to ensure that it represents the complexities of industrial energy use and meets the diverse needs of the interested parties; and investigates and implements methods to improve data collection and analysis. CIEEDAC's database covers more than twenty-six industrial sectors across Canada, disaggregated by industry sector and energy type from 1990 to the present. It also maintains historical data (1990–96) on physical energy consumption and expenditures on energy for over two hundred industrial sectors disaggregated by industry sector, energy type, and region. In order to maintain consistency, most of CIEEDAC's data come from Statistics Canada. The centre tracks industrial data using the North American

Industry Classification System (NAICS) in order to allow comparability with the United States and Mexico.

CIEEDAC services include:

- maintaining a comprehensive database from 1990 to the present that includes information on annual energy consumption, CO₂, CH₄, and N₂O emissions, cumulative greenhouse gas (GHG) emissions, and related information
- publishing annual reports on the information in the database such as trends in energy consumption, GHG emissions, and intensity indicators
- maintaining and updating databases of renewable electricity generation and cogeneration in Canada
- providing specific data analysis for sponsors and improving data accessibility and quality through focused projects
- providing an interactive database for accessing data online
- completing an annual literature review covering consumer and firm behaviour when purchasing energy-using equipment

CIEEDAC makes selected reports and research findings available to the public at no charge. Database information is also free, and accessible via the Internet. In addition to its reports, CIEEDAC maintains four major databases.

Cogeneration Database

- provides a listing of cogeneration sources
- can be queried with respect to geographic region, industrial sector (by NAICS code), input fuel supply, and year of installation

Industry Energy and GHG Database

The most recent releases for this database are two years old.

- provides the most up-to-date reports for greenhouse gases and emissions
- releases reports of energy, carbon dioxide, methane, and greenhouse gas
- provides reports for the mining and manufacturing industries
- offers reports selectable by fuel type, which includes electricity, natural gas, heavy fuel oil, light fuel oil, LPG, petroleum coke, coal, coke, coke oven gas, steam, still gas, wood, black liquor, and waste fuel

Inventory of Industrial Databases

- provides an inventory of data sources on energy
- can be queried by region (Canada, province), by data type (billing/metred, census, derived, derived (model), experience, literature, metred, survey, voluntary), or by keyword (e.g., fuels, oil and gas, fuel use, petroleum refining)

Renewable Energy Database

At time of writing, this database was being upgraded. The 2006 information will report on renewable resources and technologies used for power generation or cogeneration, renewable energy heating systems, hydrogen generation, and transportation fuels. Its purpose is to achieve the following:

- provide a comprehensive database of renewable energy facilities in Canada
- provide summary information on the mix of renewables by resource/technology type, by scale (capacity and annual generation), by owner/operator, by green certification status, and by vintage
- present results of a series of questions about policy asked to operators of renewable energy facilities

Canadian Petroleum Products Institute

www.cppi.ca

The Canadian Petroleum Products Institute (CPPI) is an organization of petroleum companies that are involved in the refining, distribution, and marketing of petroleum products. CPPI provides member services such as environmental policy work, government lobbying, and safety development in the petroleum industry. It also serves as an industry representative for the public.

CPPI provides online access to fuel quality data from CPPI members, information that is reported to Environment Canada on a regular basis. The data provided includes sulfur levels in gasoline, benzene in gasoline, low-sulfur diesel, and regular-sulfur diesel.

Canadian Plywood Association

www.canply.org

The Canadian Plywood Association (CanPly) represents plywood manufacturers in Canada. Canoe Brand, an FCL mill, is a member. CanPly provides product certification and global initiatives in market and product development, engineering, and quality assurance.

CanPly compiles historical industry statistics from Statistics Canada and member shipments for comparative analysis of trends. This includes export statistics as well as domestic production and consumption.

Member statistics are gathered on an annual or semi-annual basis but are released as consolidated figures to CanPly members in February/March of the following year. Figures, which include data on production and shipments, are limited to the membership (which comprises approximately 85 percent of total Canadian softwood plywood production). Statistics are accessible only to the membership.

Statistics Canada provides production, consumption, and shipment details on a comprehensive, industry-wide basis (including nonmembers of CanPly), which are publicly released for a fee.

Data collection contact: Areni Kelleppan, Director, Market Development,
kelleppan@canply.org, (604) 981-4178

Food and Beverage Market Place

www.tfr.com

The Food and Beverage Market Place (FBMP) provides a database of descriptions and profiles for more than forty thousand companies in the food and beverage industry. Data in the register is primarily collected from the companies themselves, with FBMP's editorial department doing further research to expand on the data. Although some Canadian companies are included, most of this information is restricted to the United States. Among other details, information for each company includes:

- parent company name
- company divisions
- number of employees
- facility size
- sales volume
- SIC code
- company type
- other locations

Access to this database is subscription based, with prices varying according to the level of access to information. The most expensive subscription is US\$895.

Data collection contact: Jessica Moody, food@greyhouse.com

Food and Consumer Products of Canada

www.fcPMC.com

Food and Consumer Products of Canada (FCPC) is the largest industry association in Canada representing the food and consumer products industry. Member companies make and market retailer and national brands sold through grocery, drug, convenience, mass merchandise, and foodservice distribution channels. Products available for purchase include:

- food and consumer products industry profile (for benchmarking purposes)
- state-of-the-industry report
- management compensation survey

Many of these reports are available to members and industry affiliates only, some at fairly steep prices. The management compensation survey, for example, is available to participating members at \$1,495; the cost to nonparticipating members is \$2,990.

Food Institute

www.foodinstitute.com

The Food Institute (FI) is a membership-based, data-gathering firm that caters specifically to the food industry. Membership provides access to economic statistics, a mergers and acquisitions database, compiled reports from many food industry magazines and news releases, and a copy of the *Food Institute Report*, which documents things such as market trends and policies, among other products and services. Information is delivered to FI members on a daily, weekly, and annual basis. Most of the institute's economic data comes in raw form from the United States Census Bureau. It is then analysed and posted to the website or published in print form. FI members sometimes have access to early-release government data. Annual membership costs US\$695.

Data collection contact: Erin Justice, Online Marketing Manager,
ejustice@foodinstitute.com

Food Processors of Canada

www.foodprocessors.ca

Food Processors of Canada (FPC) is a business association for food-industry executives who own or manage food processing companies in Canada. In addition to providing an impor-

tant voice to government, the association offers many services to its members, including guidance on matters concerning trade, commerce, and manufacturing:

- Trade
 - border security, labeling, trade negotiations, domestic and international regulations
- Commerce
 - crisis management, Revenue Canada interpretations, illegal imports, duty remissions, benchmarking, etc.
- Manufacturing
 - plant inspection practices, good manufacturing practices, inspector dispute resolution, product recalls, regulatory updates, etc.

FPC does not conduct its own data collection but relies rather on existing data collected by other agencies.

FPinfomart — Financial Post DataGroup

www.fpinfomart.ca

The Financial Post DataGroup offers subscription-based privileges to data and information from the *Financial Post*, providing access to new and archived news releases and reports, as well as to the FP Advisor, a database of information on Canadian public and private companies. The group gathers data from corporate and regulatory sources, which is then analyzed by FP experts. Information includes details on corporate directors, number of employees, revenue, net income, assets, cash flow, and cash flow ops. Industry-specific categories include:

- automobiles and components
- banks
- capital goods
- commercial services and supplies
- consumer durables and apparel
- diversified financials
- energy
- food and staples retailing
- food, beverage, and tobacco
- health care equipment and services
- hotels, restaurants, and leisure

- household and personal products
- insurance
- materials
- media
- pharmaceuticals and biotechnology
- real estate
- retailing
- semiconductors and semiconductor equipment
- software and services
- technology hardware and equipment
- telecommunication services
- transportation
- utilities

Data collection contact: Wilson Nguyen, Information Consultant, Training and Professional Services, wnguyenlicanwest.com, (416) 350-6013

Database sources in the FP Advisor include the following:

Canadian Corporate Names

- compiled by Industry Canada
- used for screening and verifying company names
- has summary information relating to more than 300,000 federally incorporated companies
- includes information such as federal/provincial jurisdiction; jurisdiction reference number; incorporation date; status (active, inactive); status updated; type (of incorporation)

Canadian Federal Corporations and Directors

- compiled by Industry Canada
- contains summary information on more than 300,000 federally incorporated companies
- includes history, amalgamations, contact information for directors, and the number of shareholders
- includes information such as office address; amalgamated corporations; new corporation; directors; incorporation date; fiscal year; assets; revenues; earnings; last annual general meeting; act incorporated under; amalgamation date

Equifax Commercial Law Record

- compiled by Equifax
- contains information on commercial legal suits and judgements from courts across Canada
- includes 600,000+ records of almost all commercial legal statements of claim and legal judgements filed in court-houses across Canada
- has four types of information: bankruptcy reports; receivership reports; legal reports; and miscellaneous reports such as mortgages, debentures, and incorporations

Financial Post Corporate Analyzer

- compiled by Financial Post DataGroup
- contains financial information on 1,400 Canadian publicly traded companies
- has up to ten years of annual financial results and ratios and up to ten quarters of quarterly results

Financial Post Corporate Surveys

- compiled by Financial Post DataGroup
- has summary information on 5,600+ companies
- includes capsule financial statements, FP 500 rankings by sales, assets, and net income

Financial Post Directory of Directors

- compiled by Financial Post DataGroup
- has information on over 17,000 business professionals
- includes business address, gender, professional history, schools attended, degrees, and date of birth

Financial Post Dividends

- compiled by the Financial Post DataGroup
- has information on historical and future dividend payments on all Canadian publicly traded companies back to 1996
- includes summary records of other corporate events such as name changes, company meetings, and rights offerings

Financial Post Historical Reports

- lists corporate activities including mergers, acquisitions, spin-offs, stock splits/consolidations, and annual highs and lows dating back to incorporation for the top 450 Canadian publicly traded companies

Financial Post Industry Reports

- offers financial ratios and analyst recommendations for twenty-three industries

Financial Post Investor Reports

- compiled by Financial Post DataGroup
- provides buy/sell recommendations and industry standard ratios for the top 900 Canadian publicly traded companies

Financial Post News Issues

- compiled by Financial Post DataGroup
- contains information on public offerings issued by Canadian publicly traded companies, governments, and agencies back to 1993
- has more than thirty fields per record, including type of offerings, security type, market, currency, exchange, status, accountants, lawyers, and underwriters

Financial Post Predecessor and Defunct

- compiled by Financial Post DataGroup
- has information on former Canadian publicly traded companies
- includes name changes, amalgamations, takeovers, acquisitions, and dissolution

Inter-Corporate Ownership

- compiled by Statistics Canada
- traces links between companies; lays out corporate family tree
- includes companies whose revenues exceed \$15 million and whose assets exceed \$10 million
- included in sample report: country of control; head office location; SIC number; investors; subsidiaries (with country of control, head office location, and SIC number)

Nexport Media's Canadian Trade Index

- compiled by Nexport Media
- has marketing and business intelligence on Canada's largest 25,000 manufacturers
- is one of the largest Canadian manufacturing datasets available based on contact information for private companies
- included in sample report: contact information; SIC classification (3–4 digits); location type; incorporation status; incorporated since; annual sales; customers; employees; ROB 1000 rank; CB 500 rank; FP 500 rank; imports; exports; unionized; bank; products; product categories; trademarks; export regions; contacts

ProFile Canada

- compiled by Nexport Media
- has information on Canada's largest privately owned companies
- includes marketing and business intelligence on Canada's largest 35,000 companies, with a focus on privately owned businesses

- gleans input via direct contact with companies
- included in sample report: contact information; SIC classification (4 digits); location type; incorporation status; incorporated/established since; annual sales; employees; ROB 1000 rank; CB 500 rank; FP 500 rank; imports (y/n); exports (y/n); unionized (y/n); bank; contacts

Lebhar-Friedman

www.lf.com

Lebhar-Friedman specializes in data for wholesalers and retailers in the United States and Canada. The Chain Store Guide (SCG, www.csgis.com), a subsidiary of Lebhar-Friedman, has detailed information on more than 200,000 retailers, foodservice operators, distributors, and wholesalers in the United States and Canada. Data elements for each industry include sales, product lines, units, total square footage, trading areas, primary wholesaler (for retailer companies in the database), and accounts served (for wholesaler companies in the database). Data is compiled by CSG staff and verified by contacting companies directly.

Data provided in a company listing includes contact information; type of business; year founded; publicly held (y/n); total sales; system-wide sales; foodservice sales; alcohol sales; Internet sales; total units; trade names; units franchised to; units franchised from; location types; trading areas; self-distributing (y/n); distributions centres; catering service; franchise affiliation; parent company; percent of revenue derived from retail operations; key personnel; and a host of other variables.

Data collection contact: Cheryl Lubin, Sales Administrator, clubin@csgis.com,
(613) 627-6963

Madison's

www.madisonsreport.com

Madison's is an information business that specializes in the Canadian lumber industry. It receives information from Statistics Canada regarding lumber export quantities, which are housed in the directory (see below). Other data is collected through direct contact with industry representatives. Madison's distributes three primary publications:

Madison's Canadian Lumber Directory

- has well-researched and cross-referenced information on the Canadian forest industry; annual publication available for sale as book or CD
- contains data on mills, sales managers and reps, mill locations, remanufacturers, general managers, wholesalers/exporters, presidents, division managers, forestry consultants, production figures, reload centres, lumber transporters, etc.

Madison's Canadian Lumber Reporter

- a weekly, subscription-based, eight-page newsletter dealing with all types of lumber in Canada
- covers important political, economic, and environmental issues shaping the market

Madison's Special Reports

- has regular special reports dealing with issues pertinent to the industry
- comes free with a subscription to *Madison's Canadian Lumber Reporter*

Data collection contact: Laurence Cater, madrep@direct.ca, (604) 984-6838

MJ Ervin and Associates

www.mjervin.com

MJ Ervin and Associates specializes in research on the petroleum marketing industry. Key research activities include performance benchmarking, price/margin analysis, and economic research and analysis, which they conduct for the federal government, industry associations, and industry refiners and marketers.

The company operates the Canadian Petroleum Markets Data Service (CPMDS), a web-based market information and resource database. Access is based upon subscription. The service provides petroleum markets information and analysis of oil product prices and operating margins.

Data sources for CPMDS include:

Canada vs. US Motor Gasoline Average Retail

- Canadian averages are from the weekly pump price survey described below
- US prices are monthly averages published by the US Department of Energy and converted into Canadian cents per litre

Crude Oil Prices

- collected daily directly from five major oil companies
- uses exchange rates from the Bank of Canada

Gasoline, Diesel, and Automotive Propane Pump Prices

- collects information daily from individual dealers by telephone in thirty-eight cities across Canada
- uses only self-serve prices

International Retail Gasoline Prices

- reports on twelve International Energy Agency members
- provides values in Canadian cents per litre
- derives price information from the International Energy Agency with the exception of the Canadian price, which is from the weekly pump price survey

Natural Gas Prices

- survey is done once a month in Vancouver, Edmonton, Toronto, and Montreal, the primary markets for natural gas automobiles

Residential Furnace Oil

- data derived from Natural Resources Canada (NRCan) during the heating season
- NRCan data gathered from residential heating oil prices and directly from Canadian refiners

Wholesale Prices

- includes regular and premium unleaded gasoline and low-sulfur diesel
- collects prices from Canadian wholesalers and reports weekly in cents per litre

National Grocers Association

www.nationalgrocers.org

The National Grocers Association is the national trade association representing and serving the retail grocery/food companies and wholesale distributors that comprise the independent sector of the food distribution industry in the United States. The organization conducts a variety of surveys on subjects such as marketing, specialty foods, and financial management, as well as the Supermarket Panel annual report.

National Petrochemical and Refiners Association

www.npradc.org

Although the National Petrochemical and Refiners Association (NPRA) is an American group, it has Canadian members, including Petro-Canada and Syncrude Canada. Research

publications, primarily compiled from other data sources (e.g., the Department of Energy and Occupational Health and Safety), include the *U.S. Refining Capacity Report*, the *Annual Lubricating Oil and Wax Capacity Report*, and the quarterly *America's Report Survey of Production*. NPRA's statistical collection includes production and inventory data on a list of petrochemicals. Members receive free access to the reports, and others can purchase them for US\$25. Petrochemical statistics are available from the NPRA on a subscription basis.

The NPRA has three petrochemical statistics publications available for members; non-members can receive the same publications via e-mail.

Americas Report Survey of Production

Published on a quarterly basis, this report compiles Canadian, Mexican, South American, and US production data for a number of petrochemicals. The report features information reported on a quarterly basis for recent years as well as annual figures for the most recent ten-year period.

Quarterly Survey of Production and Inventory Report

NPRA surveys the industry for production and inventory data on more than twenty petrochemicals. The report is published one month after the end of each quarter and is posted online after publication. The fourth quarter report of each year contains annual figures.

Selected Petrochemical Statistics, U.S. Trade Data Report

Published once a month, this report contains a variety of statistics, including import and export quantities, dollar values, and unit values for selected petrochemicals.

Data collection contact: Rick Brown, Business Manager and Petrochemical Director,
(202) 457-0480

Nickle's Energy Group

www.nickles.com

Nickle's Energy Group is an information company that specializes in the Canadian oil and gas industry. The many data products include:

The Canadian Oil Register

- accessed either in print or on line
- provides directory listings of more than 3,500 oil companies in Canada
- includes information such as the legal business name; industry sector; ISO certification; types of services; international activities; total number of employees; company registration and incorporation; type of company (public, private, partnership, joint venture, association, government agency); international activities; main banking connection; capitalization (share type, number authorized and number issued); stock price; financial summary (year-end, revenue, net income, assets, capital expenditures, cash flow, dividends, distributed income); description of industry; summary of activities

Energy Analects

- follows market trends across all energy segments

Nickle's Energy Statistics

- used for planning, analysis, forecasting, comparing performance, or spotting trends
- includes complete and updated statistics on production, drilling, land sales, financial results, prices, exports of oil and gas, reserves, and capital expenditures

Statistics Quarterly

- provides company financial and production statistics

Information is supplied by companies directly. Basic information is listed in the Oil Register for free; more detailed listings require a payment. Nickle's does not publish anything that is over one and a half years old.

Data collection contact: Ellen Heinrichs, Technical Editor, Product and Advertising Sales, eheinrichs@nickles.com, (403) 209-3520

North American Retail Hardware Association

www.nrha.org

The North American Retail Hardware Association represents independent hardware retailers in the United States and Canada. Although the organization does not appear to conduct in-house research for its members, it does provide industry statistics and trends in its monthly magazine, *D-I-Y Retailing*. The association also publishes *Market Measure*, the industry's annual report, which is packed with statistics and in-depth analysis, featuring a market

outlook, retail market profile, category rankings, and other information related to the retail hardware market and hardware retailers' financial performances. The data applies strictly to the American market.

Examples of statistics in *Market Measure* include:

- total retail sales by home improvement retailers
- sales by type of store; sales by month
- sales growth (supplied by the US Department of Commerce)
- market share profile (top twenty-five chains)
- the top ten home improvement chains (American)
- financial profile of Home Centres, including income statement and balance sheet
- financial profile of D-I-Y lumber yards, including income statement and balance sheet
- financial profile of leading publicly held D-I-Y chains (aggregated)
- profiles of wholesaling co-operatives and national distributors
- profile of wholesale merchandising groups

Data collection contact: Chris Jensen, Director of Communications, cjensen@nrha.org

Platts

www.platts.com

Platts claims to be the world's largest and most authoritative source of energy industry information and services. The company collects data and compiles it into databases accessible by subscription only. Oil industry data includes:

- world-scale crude rates (west of the Suez)
- the Dirty Tankerwire, which documents world tanker freight and fixture rates
- Bunkerwire, which lists marine fuel prices and supplies in major ports worldwide
- the Crude Oil Marketwire, which shows crude oil price spreads, trading updates, OPEC and industry officials' commentaries, market transactions, futures, and settlement prices
- many other newsletters and reports

Data sources are buyers and sellers in the energy market. Price assessments are obtained through a daily survey in the market by editorial staff. Platts covers Canadian crudes but they currently do not have Canadian product price assessments.

Data collection contact: Viviana Sedgwick, Account Executive,
viviana_sedgwick@platts.com, (212) 904-4102

Progressive Grocer Magazine

www.progressivegrocer.com

This American industry online magazine has a useful Reports and Analysis section on its web page. It also conducts its own research, which includes an annual consumer expenditures survey and an annual report of the grocery industry. In addition, you can subscribe to a free daily e-mail newsletter.

Risk Management Association — formerly Robert Morris Associates

www.rmahq.org/RMA

The Risk Management Association (RMA) is a not-for-profit, member-driven professional association whose sole purpose is to advance the use of sound risk principles in the financial services industry. RMA promotes an enterprise-wide approach to risk management that focuses on credit risk, market risk, and operational risk. There are 3,000 members, including bank and nonbank financial institutions in North America. RMA's Annual Statement Studies consists of two publications: *Financial Ratio Benchmarks* and *Industry Default Probabilities and Cash Flow Measures*. Data in the former is derived directly from more than 190,000 statements of financial institution borrowers. The statements come to RMA from member institutions, which get their data from the businesses they serve. The latter publication contains probability-of-default estimates, cash-flow measures, and change-in-financial-position information for more than 670 industries. The membership directory is not publicly distributed.

Scott's

www.scottsinfo.com

Scott's is a Canadian manufacturing and business directory firm that holds information on more than 115,000 companies and 210,000 executives in Canada. The types of companies include manufacturers, wholesalers, distributors, sales agents, and business-service providers. Scott's directly contacts every company in its databases for information, which is housed in three databases: Scott's All, National Manufacturing (all employees), and Western Industrial. Information contained in a directory entry includes company address, SIC code, phone and fax numbers, postal codes, executive names, product descriptions, sales, revenues, square

footage, employees, and year established. Access to Scott's information is either through a CD-ROM purchase or through pay-as-you-go, where individual company entries can be purchased as needed. Print directories are also available for sale.

Woodside Research Ltd.

www.woodside.ca

Woodside Research conducts research and compiles information on the Canadian oil and gas industry. It manages the CanOils Database, which provides financial and operating information on 200 active and 250 defunct companies. Woodside also provides research and analysis through their publication titled *The Woodside Report*, a monthly commentary on current issues that affect the Canadian and global oil and gas industry.

Access to the CanOils Database is via CD, which can be purchased from Woodside Research. Data includes the following:

- quarterly and annual financial operating information on Canadian oil and gas companies in a consistent format
- annual and quarterly financial and operations performance across companies

TRADE/INDUSTRY ASSOCIATIONS

Canadian Bankers Association

www.cba.ca

The Canadian Bankers Association (CBA) — the country's oldest industry association — is a professional organization that provides its members (the chartered banks of Canada and domestic and foreign banks conducting business in Canada) with information, research, and operational support, and contributes to the development of public policy on financial services. The CBA also provides information, statistics, and publications to help individual and small business consumers manage their financial affairs.

The CBA collects statistics for its members; much of this information is online. Data gathered includes ABM transactions, ABMs in Canada (region, cash withdrawals, deposits, bill

payments, and transfers); bank employment statistics; annual financial results (total assets, total loans, total deposits, total shareholders' equity, common shareholders' equity, assets to shareholders' equity, average loans as a percent of average assets); bank rankings; charitable donations; credit card statistics; mortgages in arrears; tax statistics; and transactions by delivery channel. Although most of this information is obtained directly from member banks, the CBA also uses other sources such as the Canadian Payments Association, the Office of the Superintendent of Financial Institutions, Interac, the Investment Funds Institute of Canada, Statistics Canada, and the Bank of Canada.

Canadian Council of Grocery Distributors

www.ccgd.ca

The Canadian Council of Grocery Distributors (CCGD) is a not-for-profit organization representing the grocery and food-service distribution industries in Canada. Members include Co-op Atlantic and Federated Co-operatives. In partnership with a number of organizations such as the Food Marketing Institute, the International Food Distributors Association, and Food and Consumer Products of Canada, CCGD collects industry data for its members, which is available free of charge or at a discounted rate for members and at full price for nonmembers. Costs can range from \$75 to \$550. Data covered in publications includes price trends; transportation and fleet maintenance indicators; in-store shopping experience for consumers; shopping behaviour; the effectiveness of marketing and merchandising programs; food-service trends analyses; unsaleables benchmarking reports; and state-of-the-industry statistics. Most of these publications were released in 2002. A monthly e-newsletter and useful links to other industry newsletters available on line.

Canadian Federation of Independent Grocers

www.cfig.ca

The Canadian Federation of Independent Grocers (CFIG) is a not-for-profit association representing 3,800 independent and franchised grocers across Canada. Its mission is to further the interests of its members through progressive partnerships with retailers, suppliers, and the consumer. CFIG supplies members with the *Independent Grocer* newsletter as well as

E-News, an electronic newsletter. The federation also provides a number of surveys to its members, including:

First Annual Consumer Expenditure Study (2000)

- sponsored by Agriculture and Agri-Food Canada and conducted by ACNielsen
- provides estimates of the value of consumer sales of food sold in Canada through retail grocery stores
- provides sales data from an extensive list of specific product categories, as well as broader-based categories (food, beverages, frozen)
- presents provincial sales of the broader categories and changes in sales over monthly and yearly periods

Independent Research Study

- prepared for CFGI by ACNielsen in 2000
- examines the impact of the independent channel's economic contribution to the Canadian economy in terms of jobs, GDP, charitable activities, and regional differences

Operating Results Survey

- a North American survey done every few years in conjunction with the Food Marketing Institute in the United States
- provides a broad range of operating comparisons within the Canadian marketplace and to the US independent grocery channel

Scan Data Accuracy Study

- reports on the state of scanning accuracy within the Canadian retail sector, including CFGI members
- conducted by ACNielsen

Wage Survey

- a periodic survey on employee wages and benefits
- results presented regionally and compared to national averages, as well as analyzed according to such factors as store size and the size of communities served

Canadian Produce Marketing Association

www.cpma.ca

The Canadian Produce Marketing Association (CPMA) represents national and international businesses that are active in the marketing of fresh fruits and vegetables in Canada. They are also involved in the distribution of domestic and imported produce.

CPMA conducts industry surveys and research into specific areas of interest for its members. It will also work with research firms to collect data when required, as well as with Statistics Canada; figures from the latter, however, are limited.

In terms of benchmarking information, there are currently more than 150 fruits and vegetables in the Canadian market-place, and the benchmarking variables change depending on product and/or area of research. Marketers look at elements that impact competition (i.e., production volumes, margins, import and export statistics, consumer trends and demands, etc.).

Access to CPMA's industry research, statistics, and membership directories is restricted to members and affiliated partners.

Data collection contact: Ron Lemaire, Executive Vice-President and Director of Marketing, rlemaire@cprna.ca, (613) 226-4187

Council of Forest Industries

www.cofi.org

The Council of Forest Industries (COFI) is a member-driven organization that represents companies comprising the forest industry in the British Columbia interior. COFI provides many publications on the forest industry along with statistical reports based on Statistics Canada data. Access to this data is on a subscription or single-copy basis (subscriptions run from \$65 to \$125, single copies from \$25 to \$65). Statistics are distributed monthly and quarterly. Subjects include softwood lumber and plywood exports; log exports by destination and species; wood chips and related data; and quarterly reports of exports to selected countries (e.g., United States, South Korea, and Taiwan). Annual publications include the *British Columbia Forest Industry Statistical Tables*, a compendium of statistics covering topics such as BC log exports, log production, lumber shipments, lumber production, and so on.

National Retail Federation

www.nrf.com

The National Retail Federation (NRF) claims to be the world's largest retail trade association, with membership that comprises all retail formats and channels of distribution including

department, specialty, discount, catalog, Internet, independent stores, chain restaurants, drugstores, and grocery stores as well as the industry's key trading partners of retail goods and services. NRF represents an industry with more than 1.4 million US retail establishments as well as more than one hundred state, national, and international retail associations. Although this association has a US focus, international memberships are available.

Data collection includes:

Retail Demand Insights: What Drives Consumers?

- annual research study by the NRF Foundation and Adjoined Consulting
- measures shopper desires and how well retailers deliver
- collects data from more than 6,000 interviews on consumer intent and desires

Retail Horizons

- annual state-of-the-industry report prepared by the NRF Foundation and BearingPoint
- includes information from more than 150 retail companies and more than 700 senior executives
- provides definitive benchmarks in information technology, merchandising, supply-chain management, store and field operations, customer insight and focus, advertising and marketing, online and human capital

Retail Industry Indicators

- comprehensive annual compilation of charts and tables
- includes general and specific-to-sector statistics describing US retail industry economic and business indicators, using historical information for comparison purposes
- includes data on sales, compensation and employment, profitability, business bankruptcies, shrinkage, and other information at both national and state levels
- reports data using NAICS classification system, when available, as well as the former SIC system

Sheldon's Major Stores & Chains: Directory of Retailing's Executives and Buyers, 117th edition

- complete guide to all the retailing stores and chains in Canada, Mexico, and the United States
- updated daily by thousands of sources
- provides complete vital statistics for individual stores, including a description of every line of merchandise the store sells and the buyer responsible

Retail Council of Canada

www.retailcouncil.org

The Retail Council of Canada (RCC) is a not-for-profit association whose more than nine thousand members represent all retail formats, including national and regional department stores, mass merchants, specialty chains, independent stores, and online merchants. The council conducts industry research on behalf of its members, including a recent retail survey (titled *Retail Conditions*) of the membership achieved through a mail-out form as well as individual interviews. Data collected includes sales, margins, inventories, and customer behaviour metrics such as store traffic. Survey results are available to members only. RCC also collects data from Statistics Canada such as retail sales, retail commodity sales, labour/employment numbers, and business counts.

In addition, RCC publishes a number of reports for its members, including a weekly e-newsletter titled *the voice of retail*, which is delivered to seven thousand subscribers worldwide; *Canadian Retailer* magazine, a bi-monthly publication that provides industry research, advice, and analysis; and a variety of research reports accessible only by members.

Data collection contact: Renee Quan, Manager, Research and Information,
rquan@retailcouncil.org, (416) 922-8011

Trade Dimensions

www.tradedimensions.com

Trade Dimensions is part of the ACNielsen business group in the VNU Marketing Information Group (www.vnu.com). VNU is a global information and media company with expertise in marketing information, media measurement and information, and directory publishing. Active in more than 100 countries, its directories and data services cover many aspects of the consumer packaged goods industry. In addition to publishing directories and producing electronic directory systems for business information use, Trade Dimensions also provides retail site data to food and nonfood manufacturers, investment firms, and service suppliers.

Company profiles in the directories and electronic materials are created and updated

by direct company contact at least annually and often semi-monthly. The *Retail Site Database* contains information on more than 340,000 retail sites in the US, monitoring closures, openings, mergers, acquisitions, and sales.

Products include:

Demographics USA

- comprehensive annual collection of marketing statistics
- thousands of pages of detailed demographics that cover age, sex, ethnicity, EBI (Estimated Buying Power), BPI (Buying Power Index), and more, offering comprehensive consumer profiles by region
- available in both county and ZIP code editions

The Directory of Convenience Stores

- annual publication with more than 650 pages of data on retail locations encompassing over 132,000 convenience stores in the US and Canada

High-Volume Retailers

- annual publication devoted to the “alternate” channels where consumers turn for all of their daily needs
- covers more than 600 companies operating over 90,000 stores in North America
- provides information on discount stores, dollar stores, wholesale clubs, supercentres, chain drug stores, department stores, and military buying centres; also features data on specialty retailers in other retail sectors such as toy stores, office supply superstores, and pet stores

Insider News Weekly

- a weekly newsletter covering the shopping centre industry
- profiles the expansion plans of new or existing retail chains and major shopping centre developments, legal decisions, Chapter 11 filings, mergers and acquisitions, monthly retailer sales, and more

The Marketing Guidebook

- annual publication that tracks the grocery industry
- organized into 50 statistically-generated markets covering nearly 1,400 chains and wholesalers, and more than 1,400 brokers and specialty distributors in the US and Canada

Market Scope

- annual publication providing data on supermarket retail share information for the more than 340,000 supermarkets in the US

Retail Site Database

- macro and micro store-by-store details for the retail industry
- includes store location; owner/buying office; supplier/distribution centre; geocode (latitude/longitude); all commodity volume; physical characteristics; specialty departments, etc.

The Retail Tenant Directory

- annual publication containing in-depth profiles of more than 5,400 retail chains across the US
- listed alphabetically by company name and then cross-referenced by region, by retail category, and by square footage requirements
- includes an operating name and parent name index to assist access to information

Trade Dimensions also produces special reports as issues arise, such as “Examining the Effects of Hurricane Katrina on Gulf Coast Retail.”

Western Retail Lumber Association

www.wrla.org

The Western Retail Lumber Association (WRLA) is a not-for-profit group that serves the needs and promotes the common interests of more than 760 member firms of the Canadian lumber, building materials, and hard goods industry in Manitoba, Saskatchewan, Alberta, Northwest Territories, northwestern Ontario, Yukon, and Nunavut, providing a forum for the exchange of ideas and information in the industry.

The WRLA collects information on only wages and salaries. This helps members administer their payrolls by employee category and also gives them an opportunity to develop different incentive plans for their staff. The WRLA is also affiliated with other associations across the country, each of which conducts similar wage and salary surveys. The information is for members only.

The WRLA has plans to initiate a business conditions survey in which members will be asked to supply specific key profit indicator numbers, including sales per employee hour, sales per square foot, margin rates, operating profit ratios, and expense ratios. Industry buying groups already collect much of this data, but it is proprietary and they do not currently share with the WRLA. The association would also like to establish some benchmarks for the

industry, but since Statistics Canada does not collect this type of data, the WRLA has to rely on industry consultants for the information.

Data collection contact: Gary Hamilton, Executive Director, ghamilton@wrla.org,
(204) 953-1691

GOVERNMENT STATISTICS

Agriculture and Agri-Food Canada

www.agr.gc.ca

The department produces a significant volume of socio-economic research and analysis related to agriculture and agri-food. The Policy and Planning Team is at the centre of this effort, providing analysis and partnering with other groups across the department in several areas including:

- key policy issues related to agriculture and agri-food
- data and research partnerships with other institutions that promote the interest of Canadian stakeholders
- data and information on the structure, performance, and outlook for the agriculture and agri-food sector
- quantitative and qualitative analysis about how agriculture and the agri-food sector issues affect Canadians.

Subjects include:

- the agri-food chain
- business risk management
- the environment
- food safety and quality
- innovation
- international trade and marketing
- primary sector performance
- renewal

Key publications include:

- *2005 Farm Financial Survey: Highlights* — January 06
- *An Overview of the Canadian Agriculture and Agri-Food System* — January 06

- *Farm Income, Financial Conditions, and Government Assistance, Data Book* — September 05
- *Financial Profile of Canadian Farms* (2003 Taxfiler Data, Final Estimates) — August 05
- *Farm Income Issues Data Source Book* — May 05
- *Medium Term Policy Baseline* — September 01

Finance Canada

www.fin.gc.ca

Finance Canada has a great variety of publications, some of which contain relevant statistics, in areas such as the federal budget, economic and fiscal information, financial institutions and markets, international issues, social issues, taxes and tariffs, and transfer payments to provinces. Most of these publications are available free of charge and can be downloaded from the Internet.

Industry Canada

www.ic.gc.ca

Industry Canada publishes an enormous range of information products containing statistical data in a variety of printed and electronic formats, most of which are available online.

- catalogue of published materials
 - listing of Industry Canada publications in various formats
- corporate publications
 - broad overview of Industry Canada's organization and priorities
 - include corporate documents such as main estimates, performance reports, and annual reports
- special reports
 - commissioned by Industry Canada with the intention of encouraging analysis and discussion of specific issues
- newsletters

National Energy Board

www.neb-one.gc.ca

The National Energy Board (NEB) is an independent federal agency that regulates several aspects of Canada's energy industry. Its purpose is to promote safety and security, environ-

mental protection, and economic efficiency in the Canadian public interest within the mandate set by Parliament in the regulation of imports and exports of energy products, pipeline and power line construction, energy development, and trade.

The NEB compiles statistics related to its regulatory role in the oil, gas, and electric utility industries. Examples include:

- crude oil and petroleum products statistics and reporting forms
- electricity exports and imports statistics
- frontier exploration statistics
- liquid petroleum gas underground inventories in Canada
- natural gas exports statistics and reporting forms
- natural gas imports statistics and reporting forms
- natural gas liquids statistics
- energy conversion tables

The NEB also produces numerous useful publications, many of which contain statistics and are available for downloading from its website.

Data collection contact: Ricki Pratte, rpratte@neb-one.gc.ca

Statistics Canada

Statistics Canada conducts a great deal of data collection on businesses and industries in Canada. A listing of relevant surveys is below.

- Annual Retail Chain Survey (2447)
- Annual Survey of Forestry (2107)
- Annual Survey of Manufactures (2103)
- Annual Wholesale Trade Survey (2445)
- Business Conditions Survey (2152)
- Business Register (1105)
- Canadian Petroleum and Marketable Natural Gas Reserves (7516)
- Capacity Utilization Rates (2821)
- Capital and Repair Expenditures, Actual, Preliminary Actual, and Intentions (2803)
- Capital Expenditures, Revised Intentions (2804)
- Construction Type Plywood (2138)
- Corporation Returns Act (2503)

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- Crude Oil and Natural Gas (2198)
 - Dairy Factory Production and Stocks (3430)
 - Financial and Taxation Statistics for Enterprises (2510)
 - Financial Flow Accounts (1804)
 - Inventory Statement of Butter and Cheese (3431)
 - Labour Force Survey (3701)
 - Labour Productivity, Unit Labour Cost, and Related Variables, Quarterly (5042)
 - Milk Sold off Farms and Cash Receipts from the Sale of Milk (3432)
 - Monthly Refined Petroleum Products (2150)
 - Monthly Retail Trade Survey (Department Store Organizations) (2408)
 - Monthly Survey of Large Retailers (5027)
 - Monthly Survey of Manufacturing (2101)
 - National Balance Sheet Accounts (1806)
 - Productivity Measures, Inputs and Outputs by Industry in Current and Constant Prices (1402)
 - Quarterly Retail Commodity Survey (2008)
 - Quarterly Survey of Financial Statistics for Enterprises (2501)
 - Quarterly Survey of the End-Use of Refined Petroleum Products (2168)
 - Retail Non-Store Survey (2448)
 - Retail Store Survey (2446)
 - Retail Trade Survey (2406)
 - Sawmills and Planing Mills (2134)
 - Survey of Deposit-Accepting Intermediaries: Chartered Banks, Trust Companies, Caisses Populaires, and Credit Unions (2513)
 - Survey of Employment, Payrolls, and Hours (2612)
 - Survey of Financing of Small and Medium Enterprises (2941)
 - Survey of Suppliers of Business Financing (2514)
 - Wholesale Trade Commodity Survey by Origin and Destination (5061)
 - Wholesale Trade Survey (2401)
 - Workplace and Employee Survey (2615)

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