
From: Van Dusen, Regina on behalf of Regional Clerk
Sent: Friday, February 28, 2020 3:15 PM
Subject: Regional Council Decision - 2019 Employment and Industry Report

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On February 27, 2020, Regional Council made the following decision:

1. The York Region 2019 Employment and Industry Report (Attachment 1) be circulated by the Regional Clerk to local municipalities, local chambers of commerce, boards of trade, the Workforce Planning Board and Toronto Global.

The original staff report is attached for your information.

Please contact Paul Bottomley, Manager, Policy, Research and Forecasting at 1-877-464-9675 ext. 71530 if you have any questions with respect to this matter.

Regards,

Christopher Raynor | Regional Clerk, Office of the Regional Clerk, Corporate Services

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Our Mission: **Working together to serve our thriving communities – today and tomorrow**

The Regional Municipality of York

Committee of the Whole
Planning and Economic Development
February 6, 2020

Report of the Commissioner of Corporate Services and Chief Planner

2019 Employment and Industry Report

1. Recommendation

The York Region 2019 Employment and Industry Report (Attachment 1) be circulated by the Regional Clerk to local municipalities, local chambers of commerce, boards of trade, the Workforce Planning Board and Toronto Global.

2. Summary

The Employment and Industry Report 2019 provides an overview of industry and business sectors and employment growth trends in the Region primarily based on data collected from the 2019 Employment Survey.

Key Points:

- York Region surveyed over 35,400 businesses with a physical location in 2019
- There were an estimated 654,650 jobs in York Region as of mid-year 2019
- Between 2018 and 2019, York Region employment grew by 13,800 jobs or 2.2%
- York Region's economy continues to shift toward knowledge-based, service-oriented jobs
- Contract, seasonal and temporary jobs continue to be the fastest growing type of employment

3. Background

Understanding Regional business and employment growth trends is important to support economic vitality

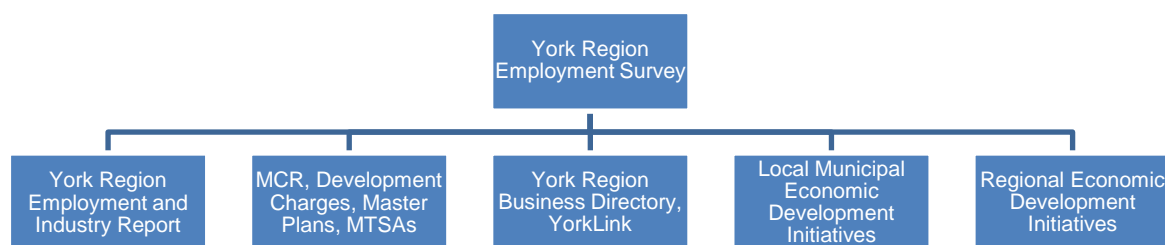
Business and job growth are fundamental to York Region's economic vitality. Attracting and retaining high quality, good paying jobs across a broad range of sectors promotes economic resilience and helps ensure those living in York Region have the opportunity to work and thrive where they live. Through the employment survey, the location, type and characteristics of businesses in the Region are tracked and analyzed. The data and analysis identify trends

and inform the development of Regional policies by providing base data for the Development Charges Bylaw, planning for growth and land needs work and infrastructure planning.

Data and analysis is shared with internal and external organizations to support policy and program development

The data and analysis contained in this report are valuable resources for the Region and local municipalities. The data is used by the Planning and Economic Development branch, other municipal departments, non-profit organizations and private sector groups (Figure 1). Some key uses of the data include supporting preparation of employment growth forecasts used to inform long-term employment land needs, the Region's Development Charges By-law and infrastructure requirements in master plans for transportation and water and wastewater, monitoring targets in York Region's Official Plan, identifying economic trends and emerging sectors, and maintaining Regional and local business directories.

Figure 1
York Region Employment Survey Uses



York Region's Employment Survey is one of a number of sources of data used to monitor economic trends

Since 1998, the Region has conducted surveys of businesses with a physical location across the nine municipalities. The survey provides qualitative and quantitative data of the Region's businesses that is compared over time to identify trends. Since 2012, the employment survey has been collecting home-based data on a voluntary basis in an effort to report on home-based business trends. Home-based businesses are encouraged to submit information through the York Region website. Through this method, a total of 1,040 home-based business records have been produced, representing 1,300 jobs. Although this figure is not directly comparable to work at home jobs, in 2019 there were an estimated 52,600 work at home jobs in the Region.

The employment survey does not survey farms. Census of Agriculture data is used to report on trends and the total employment estimate. The Region is home to 700 farms, employing over 3,200 people. Jobs created by the agricultural sector go beyond the farm. There are 27 industries that are directly related to the agricultural sector including primary farming, retail, wholesale and food and beverage manufacturing.

4. Analysis

NATIONAL AND PROVINCIAL OVERVIEW

York Region recorded employment growth of 2.2% in 2019

York Region recorded employment growth of 2.2% in 2019 compared to 2.5% provincially and 2.2% nationally. Over the past five years, York Region has grown at an average annual rate of 2.9%, outperforming growth rates in the national (1.3%), provincial (1.6%) and GTA (2.6%) economies. According to RBC Economics, Canada's GDP is forecast to increase 1.6% in 2020, similar to 2019's 1.7% increase.

Table 1
Comparison of Annual Labour Force and Employment Growth Rates:
Canada, Ontario, GTA and York Region, 2014-2019

	Canada	Ontario	Greater Toronto Area ¹	York Region ²
2014-2015	1.0%	1.1%	4.3%	2.6%
2015-2016	0.4%	0.5%	0.9%	3.4%
2016-2017	2.1%	1.8%	1.4%	3.3%
2017-2018	1.1%	2.0%	2.8%	3.3%
2018-2019	2.2%	2.5%	3.8%	2.2%
5 year average	1.3%	1.6%	2.6%	2.9%

Source: York Region Planning and Economic Development Branch, 2019 and Statistics Canada's Labour Force Survey, 3-month moving average, unadjusted for seasonality, ending in August 2019

¹ Greater Toronto Area labour force employment growth approximated by the Toronto Economic Region

² York Region figures based on 2018 employment survey results and estimates for home-based, farm-based, and no contact businesses

Services-producing sectors are the primary drivers of national, provincial and GTA employed labour force growth

Between mid-year 2018 and mid-year 2019, labour force employment in Canada increased by 2.2% (414,300 jobs), compared to 1.1% or 202,900 jobs from 2017 to 2018. Employment growth in services-producing sectors such as health care, professional and technical services, and wholesale and retail trade were the primary drivers of this growth. Labour force employment in Ontario increased by 2.5% (184,900 jobs). Similar to national employment gains, the majority of the province's growth was driven by employment in services-producing industries including professional and technical services, transportation and warehousing, public administration, health care and social assistance.

GTA employed labour force growth, driven primarily by services-producing sectors, was stronger than both Ontario and Canadian growth at 3.8% (133,700 jobs). The services-

producing sectors recorded an increase of 108,700 jobs, with health care and social assistance, professional, scientific and technical services, and transportation and warehousing reporting the largest gains. The goods-producing sectors experienced an increase of 24,900 jobs (4.1%) with the manufacturing sector driving most of this growth.

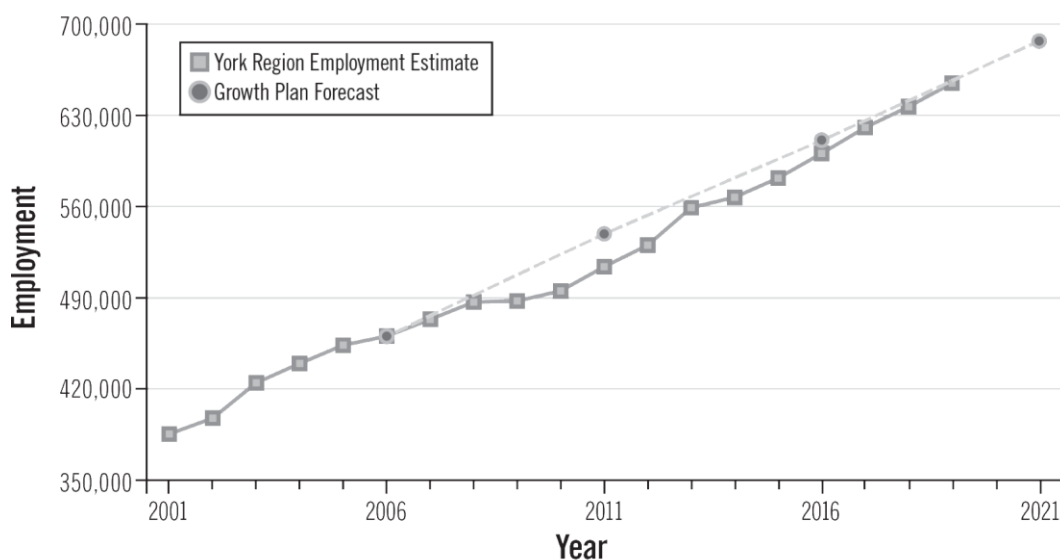
YORK REGION EMPLOYMENT

York Region employment continues to grow at a steady pace

According to York Region's employment survey, employment grew to an estimated 654,650 jobs in 2019, an increase of 2.2% or 13,800 additional jobs compared to 2018. This total includes surveyed employment figures from contacted firms, 2016 census of agriculture jobs, estimates for work at home employment and businesses the Region was unable to contact.

Since 2001, York Region's employment has grown by over 269,000 jobs (Figure 2), representing a strong average annual growth rate of 3%. This balanced rate of growth continues to align with the population growth rate for the same time period (3%) and provides job opportunities for existing and future York Region residents. An activity rate of 50% is consistent with the Regional Official Plan target where the goal is to have 1 job for every 2 residents. The Region's activity rate has been increasing since 2010 and is currently 55%.

Figure 2
York Region Total Employment Estimate 2001-2019 and
Growth Plan Employment Forecast

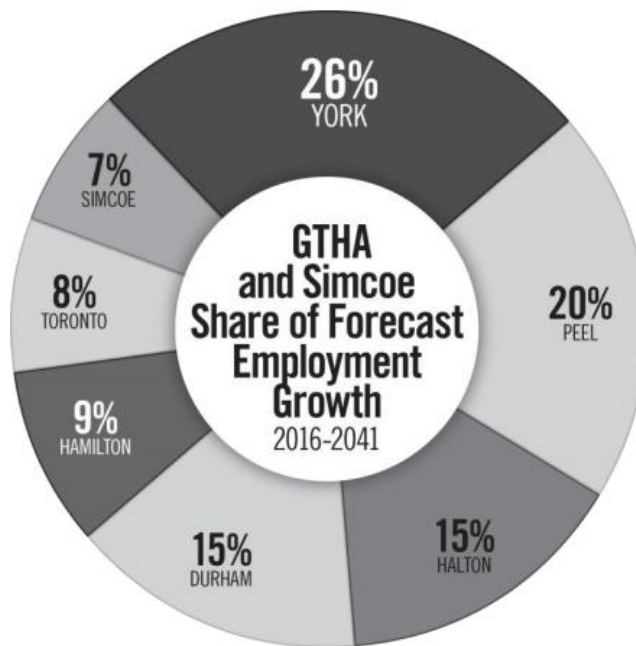


Source: York Region figures based on employment survey results and estimates for home-based, farm-based, and no contact businesses and Growth Plan Employment Forecast Amendment 2.

York Region is on track to meet the Growth Plan's 2041 employment forecast

According to the 2019 Provincial Growth Plan, York Region is expected to reach a total of 900,000 jobs by 2041. This represents a 26% share of total employment growth within the Greater Toronto and Hamilton Area (GTHA) and Simcoe (Figure 3) from 2016 to 2041. At 654,650 estimated jobs in 2019, an additional 245,350 jobs or approximately 11,150 jobs annually are required to meet the 2041 employment target. Over the past five years, the Region has added on average 15,000 jobs annually.

Figure 3
GTHA & Simcoe, Share of Forecasted Employment Growth to 2041



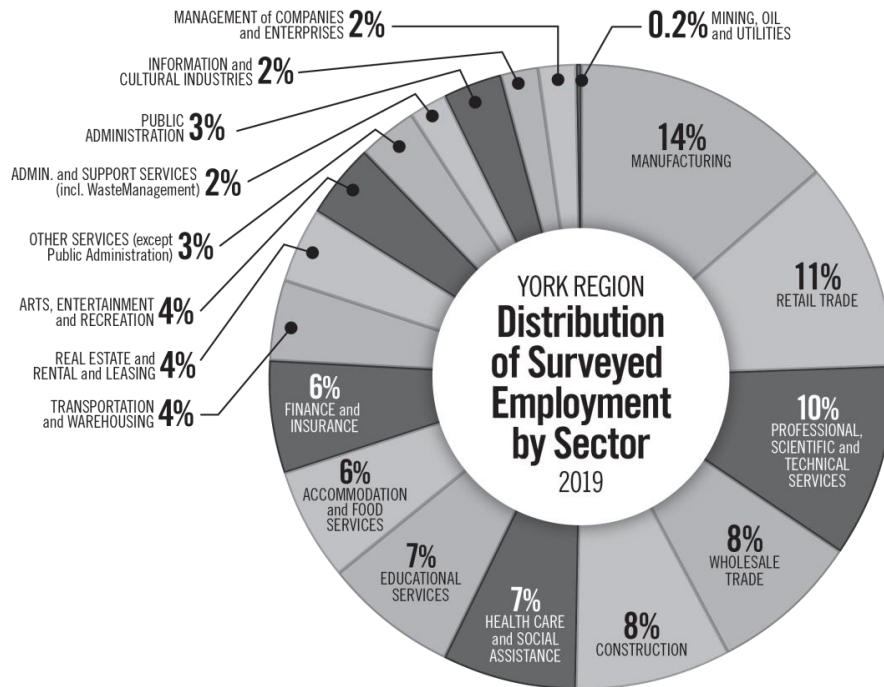
Source: Statistics Canada Census Data, 2016, Growth Plan for the Greater Golden Horseshoe, 2019, Schedule 3

York Region has a diverse and resilient economy

York Region has a diverse economic base with employment across a broad range of sectors. This is vital to maintaining the Region's resiliency to any future economic changes, as a more diverse economy will be less sensitive to job losses in a specific employment industry.

According to the York Region employment survey, manufacturing (14%), retail trade (11%), and professional, scientific and technical services sectors (10%) accounted for the largest shares of surveyed employment by mid-year 2019. Figure 4 demonstrates the diversity of the Region's employment base.

Figure 4
York Region Distribution of Surveyed Employment, 2019



Source: York Region Planning and Economic Development Branch, 2019 Employment Survey

Contract/Seasonal/Temporary employment steadily increased over the last decade

Contract/seasonal/temporary employment continues its trend as the fastest growing type of work with an increased share of employment from 5% in 2009 to 15% in 2019, representing growth of 68,470 jobs during this time. Over the same decade, the share of full-time employment decreased from 76% to 67% (+56,900 jobs). Part-time workers declined from 20% to an 18% share of employment, but increased by 17,700 jobs over the same time period. Although full-time employment remains strong, the steady increase of contract/seasonal/temporary employment is indicative of a shifting job market.

Over 80% of the Region's business community is made up of small businesses

According to the Statistics Canada Business Counts (CBC) database, York Region is home to over 54,200 licensed business establishments, versus the 35,400 businesses surveyed by York Region. Statistics Canada Canadian Business Counts (CBC) is a database based on the Canadian Business Register and uses business registration numbers as the basis for their business counts. Businesses contained in the listing include home based and

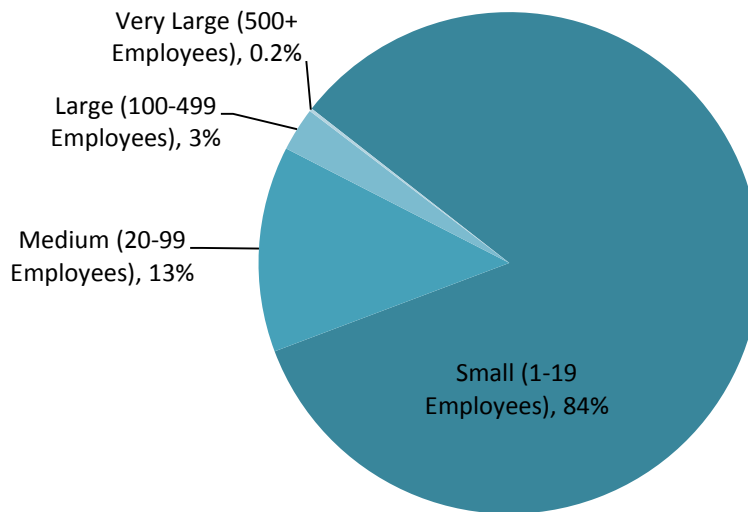
household employers and businesses that have filed a federal corporate income tax within the past three years and can include some business establishments that may have ceased operation. The CBC is a common and useful data source used by Regional staff for benchmarking business trends with other jurisdictions who do not conduct employment surveys. Despite differences in data collection methods used by Statistics Canada's CBC and York Region's Employment Survey the datasets complement each other and advance our knowledge on trends occurring in the Region's business community.

York Region surveyed over 35,400 businesses in 2019 with a physical location, an increase of over 7,000 businesses from the 2009 survey. Small businesses (1-19 employees) account for the largest share of the Region's surveyed businesses at 84% or 28,000 businesses in 2019 (Figure 5). This total share is in line with the share of small businesses throughout the Province and across Canada and is indicative of the important role of small business and entrepreneurship in York Region's economy.

The Region provides support to small businesses in the form of direct-to-business advisory services, economic research, innovation initiatives, business place making and attraction marketing. The Region also delivers small business and entrepreneurship advisory support services through the York Small Business Enterprise Centre. Example success stories of small businesses growing in York Region are Pondtech, a carbon capture and utilization company in Markham, and STEM Minds, who deliver educational programs to children, in Aurora.

While the share of very large businesses (500+ employees) is relatively small at 0.2% of the Region's total number of establishments, it has grown almost 26% over the last 5 years (from 49 to 64 businesses) and provides jobs for almost 68,000 employees (12% of total jobs).

Figure 5
York Region Surveyed Business by Size, 2019



Source: York Region Planning and Economic Development Branch, 2019 Employment Survey

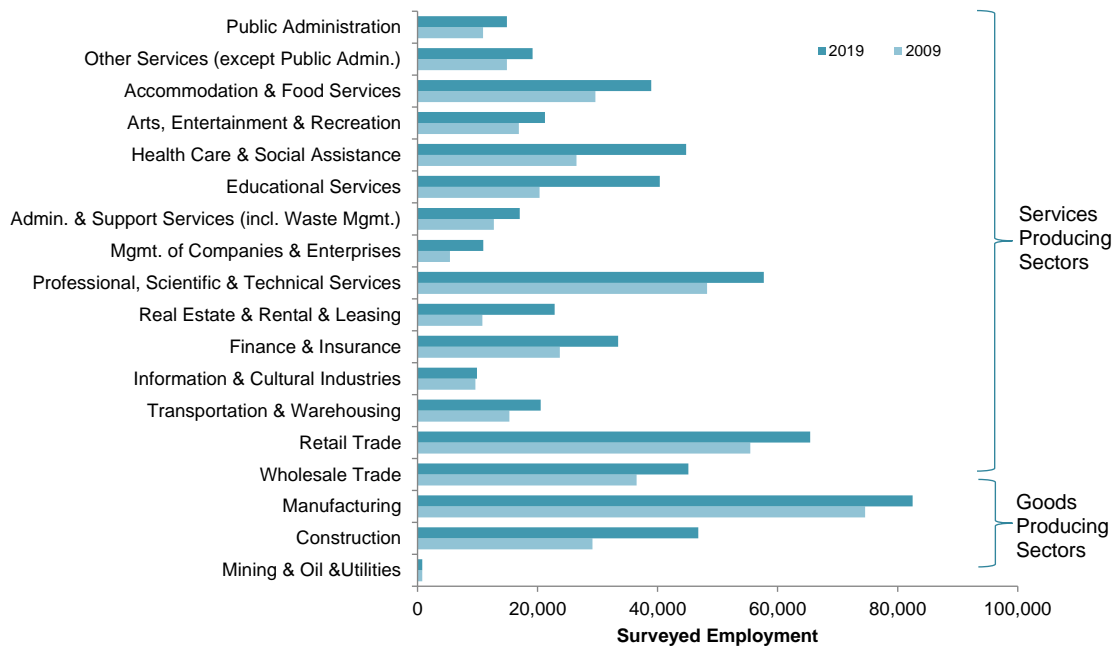
YORK REGION SERVICES-PRODUCING SECTORS

Strong job growth was experienced over the last ten years by key knowledge-based sectors in York Region

Similar to national and provincial trends, York Region's economy continues to shift toward more knowledge-based, service-oriented jobs. Over the past ten years, employment in services-producing sectors increased by 3.2% on an average annual basis, adding 125,370 jobs to the Region's employment base (Figure 6). Comparatively, employment in the goods-producing sectors grew at a more moderate pace of 2.2% annually, adding 25,600 jobs.

Regional Council has contributed to this strong job growth through capital investments in infrastructure, roads, water and sewer, public transit, small business support programs, YorkLink office marketing program, Spadina subway expansion, Region's Centres and Corridors Strategy and YorkNet Broadband Strategy.

Figure 6
York Region Surveyed Employment by Sector, 2009-2019



Source: York Region Planning and Economic Development Branch, 2019 Employment Survey

Manufacturing jobs continue to hold the largest share of employment in York Region (14%). However, the annual growth rate in the goods-producing sector has been 2.2% during the last ten years, while the services-producing sector has a 3.2% growth rate. The manufacturing subsectors of food manufacturing, plastics and rubber products manufacturing and transportation equipment manufacturing contributed the most to the ten year growth, while petroleum and coal product manufacturing experienced a modest decline. The higher annual growth rate in the services-producing sector is attributed to employment growth in educational services, health care and social assistance and finance and insurance sectors.

Services-producing sectors have grown steadily during the last 10 years by an annual average rate of 3.2%

Key trends observed in services-producing sectors over the last 10 years include the following:

- The real estate sector is the fastest growing sector since 2009 with an average annual increase of 7.8%, increasing by 12,050 jobs
- Educational services sector has doubled in the number of jobs since 2009, adding over 20,040 jobs in the last decade, an average annual increase of 7.1%

- The professional, scientific, and technical services sector has added over 9,400 jobs over the last decade, an annual growth rate of 1.8%
- Finance and insurance sector has increased at an average annual rate of 3.5% over the last 10 years adding approximately 9,700 jobs
- Health care and social services sector had an average annual growth rate of 5.4%, adding over 18,290 jobs since 2009

Goods-producing sectors have grown by an average annual rate of 2.2% over the last 10 years

Key trends observed in goods-producing sectors over the last 10 years include the following:

- Manufacturing continues to hold the largest share of employment in the Region at 14%. The 2008-09 recession impacted the manufacturing sector and lowered its growth rate over the last ten years, however manufacturing employment still increased by 7,900 jobs over that period
- The construction sector has demonstrated strong growth since 2009, adding over 17,600 jobs to the Region, growing at an average annual rate of 4.9%

York Region continues to invest to support growth

York Region's Economic Development Action Plan addresses key economic challenges and opportunities facing York Region and translates them into innovative economic growth areas. York Region Official Plan (ROP) policies on complete communities, affordable housing and employment are intended to position the Region to attract growth as a place where residents can work, live and play.

Along with the initiatives identified in the Economic Development Action Plan and policies in the ROP, the Region continues to make investments that support business growth and innovation. Examples of these investments are the York Link branding office marketing and communications plan which supports business growth in our centres and corridors, business parks and the future Yonge Subway extension. The Vaughan Metropolitan Centre (VMC) subway station has been a catalyst to support and create desirable business locations resulting in recent success stories such as opening of the new 77,000 square foot PricewaterhouseCoopers office in the VMC. The construction of VIVA, and two-way all day GO Regional Express Rail to York Region will greatly improve the level of service and attract businesses and workers.

Business and job growth in the Region is supported by major transit investments, particularly in the Region's Centres and Corridors. The Regional Official Plan vision for Regional Centres and Corridors is to achieve the most intensive and greatest mix of development in the Region. Centres and Corridors are supported by over \$3.6 billion in transit infrastructure investment and also through regional initiatives such as the Office Incentives Program. As the Region's urban structure continues to evolve and Regional Centres and Corridors

mature, York Region will continue to be competitive as a top business location in the Greater Toronto Area.

Factors Contributing to Economic Growth in York Region

York Region continues to be a top destination in the Toronto area and Canada for business, talent and investment. It is one of the largest business hubs in the GTA. The Spadina Subway extension (Line 1) into Vaughan provides a direct connection to downtown Toronto and its workforce. The Region's central location in the GTA is also strategic for goods movement located in close proximity to Toronto Pearson Airport, the CP intermodal facility and CN MacMillan rail yard. Additionally, the Region has a strong network of 400-series highways which connect the Region to the broader provincial and national markets, all contributing to the newly opened 550,000 square foot IKEA Canada Customer Distribution Centre in Vaughan in 2019.

The Region's economy is underlined by core attributes of population and employment growth, skilled labour force, high quality of life that attracts top global talent, established and diversified industry clusters, major infrastructure and transportation investments and locational and accessibility factors among others. Housing options and affordability are key factors in attracting new businesses, retaining existing businesses and attracting a labour force looking for close proximity to work. The Region and the local municipalities continue to work together to ensure a wide variety of housing types and more options at varying levels of affordability are available.

Data and analysis from the Employment and Industry Report 2019 informs the Regional Municipal Comprehensive Review

Employment survey data has been used as input to the Planning for Employment Background Report endorsed by Council in May 2019. Going forward will inform planning for employment. Reports will be brought forward to Council throughout 2020 on the following:

- Planning for Growth Direction Report with draft population and employment forecasts and a draft land needs assessment
- Planning for Employment Report
- Update report on Major Transportation Station Areas (MTSA) in York Region
- Draft Regional Official Plan update

The Employment Survey will be conducted every two years going forward

York Region's employment survey was first conducted in 1998 and since 2001 has been conducted on an annual basis. The data collected has been used to report to Council annually on industry and business sectors and employment growth trends through the annual Employment and Industry report. In accordance with the September 2019 Council report, [York Region Employment Survey Data Collection Frequency](#), the Employment Survey will be conducted every two years on a go forward basis. An employment survey every two years will continue to provide key insights into employment and economic trends within the Region.

The next full employment survey collection will occur in 2021 and results reported to Council in Q1 2022.

The Employment Survey supports the 2015-2019 Strategic Plan, Vision 2051 and the Regional Official Plan

Annual reporting on detailed employment and sectoral analysis enables the Region to make informed decisions and implement initiatives that enhance economic vitality and foster an innovative economy. Data collected is used to support monitoring of employment targets in the Regional Official Plan. Economic research and analysis is a program focus area within the Economic Development Action Plan. Data from the employment survey helps measure outcomes of action areas in the Plan such as the Office Attraction Strategy tracking office development and tenant activity in York Region and the Workforce/Labour Force Development action area. These strategies have influenced job growth and attracted a number of businesses in the Centres and Corridors.

5. Financial

Work related to generation and analysis of employment data is completed by internal resources and all costs are addressed in the approved Planning and Economic Development branch budget. The annual employment survey is conducted in partnership with the nine local municipalities, at a shared cost.

6. Local Impact

Local municipalities use the information and analysis generated in the Employment and Industry report to identify and report economic trends on an annual basis, to assist in developing business retention and expansion strategies, produce local business directories and inform employment land strategies. Information from the York Region employment survey was collected with assistance and support of all nine local municipalities including financial assistance and survey promotion. The results, including a detailed database, are provided to each municipality for their use.

7. Conclusion

The 2019 Employment and Industry report identifies key trends in Regional businesses and employment growth. York Region has a large, diverse economy with strong growth experienced in recent years primarily in services-producing sectors as well as recovery in the goods-producing sectors. According to York Region's employment survey, employment rose to an estimated 654,650 jobs in 2019 (by 2.2%). This sustained employment growth continues to diversify the Region's economy and promote economic resilience, vitality and liveability.

For more information on this report, please contact Paul Bottomley, Manager, Policy, Research and Forecasting at 1-877-464-9675 ext. 71530. Accessible formats or communication supports are available upon request.

Recommended by: **Paul Freeman, MCIP, RPP**
Chief Planner

Dino Basso
Commissioner of Corporate Services

Approved for Submission: **Bruce Macgregor**
Chief Administrative Officer

January 27, 2020
Attachment (1)
eDOCS# 10431951

2019 EMPLOYMENT & **INDUSTRY** REPORT

A detailed overview of industry and employment trends in York Region

FEBRUARY 2020



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INTRODUCTION




→ HIGHLIGHTS

- There were an estimated **654,650 jobs** in York Region as of mid-year 2019
- York Region surveyed over **35,400 businesses** in 2019
- Between 2018 and 2019, York Region employment grew by **13,800 jobs** or **2.4%**
- **67%** of York Region's surveyed employment was full-time
- **78%** of surveyed employment in York Region was in services-producing sectors
- The manufacturing, retail trade, and professional, scientific and technical services sectors continue to hold the largest shares of surveyed employment in 2019
- The transportation and warehousing sector and construction sector both recorded the largest employment gains in terms of absolute growth increasing at approximately **1,500 jobs each**
- The number of surveyed businesses that employ **500 or more employees** grew by **25%** between 2014 and 2019 from 49 to 64

Through the employment survey the location, type and characteristics of businesses in the Region are tracked and analyzed. Since 1998, the Region has conducted an industry wide survey of businesses across the nine municipalities. The data is collected from May-August and is aggregated for reporting and monitoring. The employment survey provides a snap shot of the Region's businesses that can be compared over time to identify trends. This type of information is important as it provides many market indicators and trend analysis that inform the development of Regional policies, programs, marketing initiatives and infrastructure investments.

Business and job growth are fundamental to York Region's economic vitality. Attracting and retaining high quality, good paying jobs across a broad range of sectors promotes economic resilience and helps ensure those living in York Region have the opportunity to work and thrive where they live. The ***Employment and Industry Report 2019*** provides an overview of the Region's business and job growth.

Other sources of information used within the report include Statistics Canada's Labour Force Data, Canadian Business Counts data, Census of Agriculture and 2016 Census data. Further details regarding data sources and methodology are contained within appendices A and B.

An aerial photograph of a city intersection. In the foreground, a group of about ten pedestrians is crossing a wide street with white zebra crossings. A dark grey sedan is stopped at the intersection. To the left, there is a bus stop shelter and a traffic light. In the background, there are green trees, a grassy area, and a modern building with large glass windows. A street sign for 'South Park' is visible on a pole. The overall scene is bright and sunny, with shadows cast by the trees and buildings.

➡ As of mid-year 2019,
York Region's total
employment was
estimated to be
654,650 jobs.

NATIONAL and PROVINCIAL OVERVIEW

York Region recorded employment growth of 2.2% in 2019

TABLE 1 - Comparison of Annual Employment Growth Rates: Canada, Ontario, Greater Toronto Area (GTA) and York Region, 2019

	Canada	Ontario	Greater Toronto Area ¹	York Region ²
2014-2015	1.0%	1.1%	4.3%	2.6%
2015-2016	0.4%	0.5%	0.9%	3.4%
2016-2017	2.1%	1.8%	1.4%	3.3%
2017-2018	1.1%	2.0%	2.8%	3.3%
2018-2019	2.2%	2.5%	3.8%	2.2%

Source: York Region Planning and Economic Development Branch and Statistics Canada's Labour Force Survey, 3-month moving average, unadjusted for seasonality

Notes: ¹ Greater Toronto Area labour force employment growth approximated by the Toronto Economic Region

² York Region figures based on 2019 employment survey results and estimates for home-based, farm-based, and no contact businesses.

The Statistics Canada's labour force data provides a broad overview of employment trends at the national, provincial and GTA levels. Direct comparisons should not be made when comparing the Statistics Canada's labour force data to York Region's employment survey data. Refer to Attachment 1 on page 3 for a more detailed explanation.

York Region employment growth kept pace with national and provincial rates posting a gain of **2.2%** between mid-year 2018 and mid-year 2019, compared to 2.5% provincially, 2.2% nationally. The GTA (Table 1) saw **3.8%** growth, driven primarily by very strong growth in the City of Toronto.

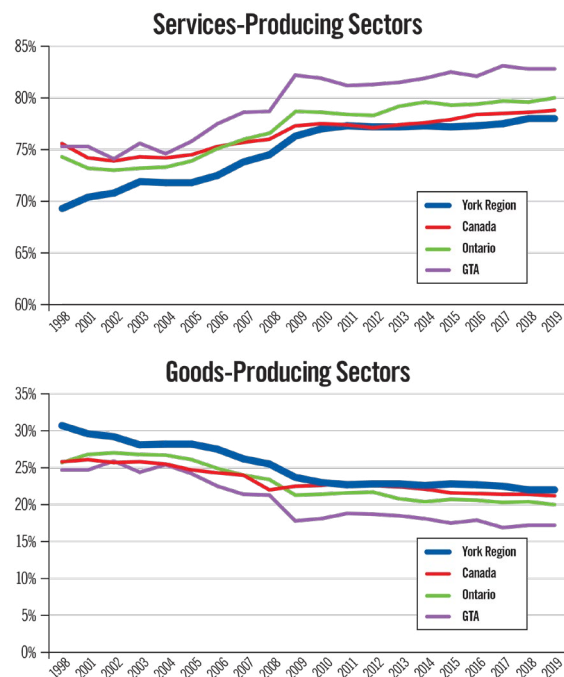
According to the Statistics Canada Labour Force Survey, Ontario (2.5%) and The Greater Toronto Area (GTA) (3.8%) posted higher labour force employment growth between mid-year 2018 and mid-year 2019 compared to the same time period from 2017 to 2018. Canada's labour force growth also increased from 1.1% (2017-2018) to **2.2%** (2018-2019).

It is important to note that while Statistics Canada's labour force data is useful for trend analysis, there are high levels of variability in the data and the information is not directly comparable to York Region's employment estimate. The labour force survey represents GTA residents of working age who may or may not work in the GTA. The annual York Region employment survey data records the number of jobs in the Region and is comprised of working age individuals who work in York Region and who may or may not be residents of the Region.

Services-producing industries continue to grow steadily in York Region, provincially, and nationally

Since 1998, the share of service-oriented jobs for Canada, Ontario, the GTA and York Region has shown steady growth (Figure 1). In comparison, the share of employment in the goods-producing sectors has shown a gradual decline over time. Yet, York Region has consistently held a larger share of goods-producing employment than Canada, Ontario and the GTA.

FIGURE 1 - Distribution of Goods and Services Producing Employment, Canada, Ontario, GTA, York Region, 1999-2019



Source: York Region figures based on 2019 employment survey results. Canada, Ontario and GTA figures based on Statistics Canada Labour Force Survey, 3-month moving average, unadjusted for seasonality, ending in August 2019



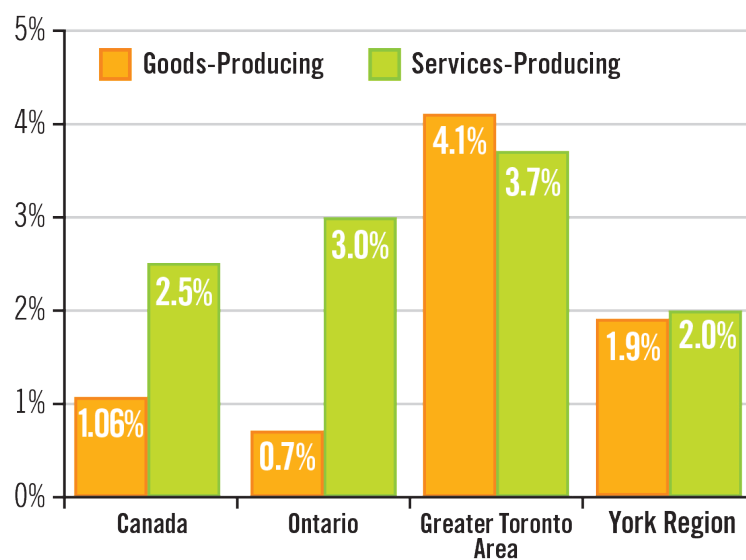
NATIONAL and PROVINCIAL OVERVIEW

Between mid-year 2018 and mid-year 2019 York Region, the GTA, Canada and Ontario all experienced growth in the goods-producing sectors (Figure 2). The increase for the GTA occurred in mainly the manufacturing and construction sectors. Canada's services-producing industries increased by **2.5%** over the year with growth in the professional, scientific and technical services subsector (**+89,200 jobs, 5.9% growth**), health care and social assistance (**+93,400 jobs, 3.9% growth**), and the wholesale and retail trade subsector (**+61,200 jobs, 2.2% growth**).

Overall, employment in Ontario increased by 184,900 jobs or 2.5% from mid-year 2018 to mid-year 2019. An increase in employment was experienced in the goods-producing subsectors of construction (**+11,000 jobs, 2.0% growth**) and agriculture (**6,500 jobs and 8.8% growth**), while manufacturing experienced a slight decrease (**-1,500 jobs, -0.2%**). Within the services-producing industries Ontario's growth followed a similar pattern to overall Canadian trends with professional, scientific and technical services leading growth at **7.6% (+49,700 jobs)**. This was followed by health care and social assistance with **7.0% growth (+59,600 jobs)** and transportation and warehousing growing by **7.0% or (26,300 jobs)**.

The GTA's goods-producing sector increased over the previous year by **4.1%**, a gain of **24,900 jobs**. Total GTA employment increased by **133,700 jobs or 3.8%**. The subsectors posting the largest growth in the GTA included health care and social assistance (**+51,900 jobs, 15.2% growth**), the professional, scientific and technical services sector (**+42,500 jobs, 10.4% growth**) and transportation and warehousing (**+33,000 jobs, 15.3% growth**).

FIGURE 2 - Labour Force Employment Growth Rates for Goods and Services Producing Sectors, Canada, Ontario, GTA and York Region, 2018-2019



Source: Statistics Canada's Labour Force Survey, 3-month moving average, unadjusted for seasonality

YORK REGION EMPLOYMENT ANALYSIS

York Region employment was estimated at 654,650 jobs at mid-year 2019

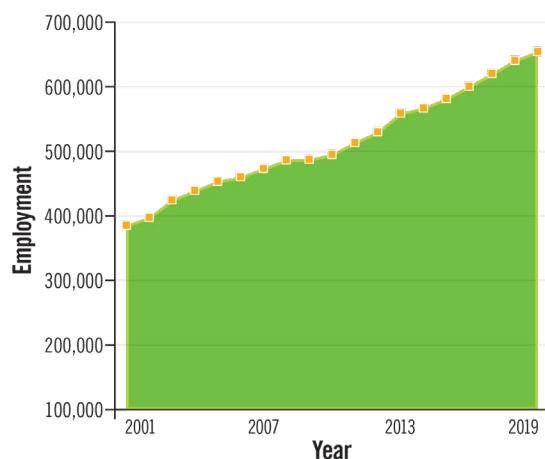


TABLE 2 - York Region Total Employment Estimate 2019

York Region Total Employment Estimate 2019	
Surveyed Employment	592,372
No Contact Estimate	6,405
Agriculture	3,256
Work at Home Estimate	52,617
Total	654,650

Source: York Region Planning and Economic Development Branch Employment Survey, 2019

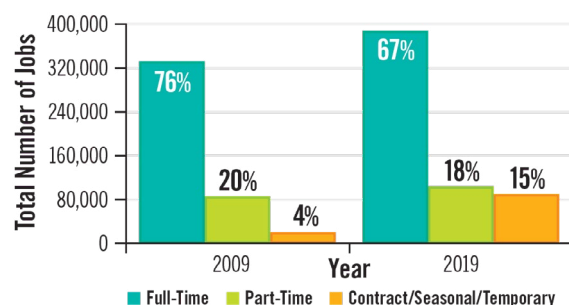
FIGURE 3 - York Region Estimated Total Employment Growth, 2001-2019



Source: Employment figures for 2001 and 2006 are based on Statistics Canada Census data. Employment figures from 2002-2005 and 2007-2019 are based on York Region's estimated total employment.

Note: York Region figures based on employment survey results and estimates for home-based, farm-based, and no contact businesses. Historical employment figures were revised from those released in previous Employment and Industry reports based on updated information.

FIGURE 4 - York Region Surveyed Employment by Type of Worker, 2009 and 2019



Source: York Region Planning and Economic Development Branch Employment Survey, 2019

As of mid-year 2019, the Region's total employment was estimated to be **654,650 jobs**. This estimate includes job totals from contacted firms, census of agriculture jobs, estimates for work at home employment and for businesses that the Region was unable to contact.

Table 2 outlines how the 2019 total employment estimate was derived.

York Region continues to be one of Canada's fastest-growing municipalities with average annual growth in employment and number of businesses of approximately **3%** and **2%** respectively over the past five years. Since 2001, the Region's employment has grown by over **269,000 jobs** representing a strong average annual growth rate of **3%** (Figure 3). This balanced rate of growth continues to align with the population growth rate for the same time period (3%) and provides job opportunities for existing and future York Region residents. An activity rate of **50%**, or 1 job for every 2 residents, is the Regional Official Plan target. The Region's activity rate has been increasing since 2010 and is currently **55%**, meaning that the Region has slightly more than **1 job for every 2 residents**.

YORK REGION EMPLOYMENT by TYPE OF WORKER

Contract/Seasonal/Temporary workers continue to increase.

Full-time workers continue to account for the largest share of employment type in York Region at **67%**. Contract/seasonal/temporary employment continues its trend of the fastest-growing type of worker with an increase in share from **5%** in 2009 to **15%** in 2019, representing growth of 68,500 jobs during this time. Over the same decade full-time employment decreased in share from **76%** to **67%**, yet grew by over **56,900 jobs**. Part-time workers declined from a **20%** to **18%** share of employment and increased by **17,700 jobs** over the same time period (Figure 4).



YORK REGION EMPLOYMENT ANALYSIS

Full-time employment is an important labour market indicator of economic performance and the Region continues to demonstrate strength in full-time employment opportunities for its residents, attracting a highly-skilled labour force. Providing opportunities for all types of employment such as part-time and contract/seasonal/temporary is also important for residents as work preferences change. Although York Region has historically maintained a healthy proportion of full-time employment, it is still important to monitor trends in changes to employment type composition as it may have future implications on the Region's economic well-being.

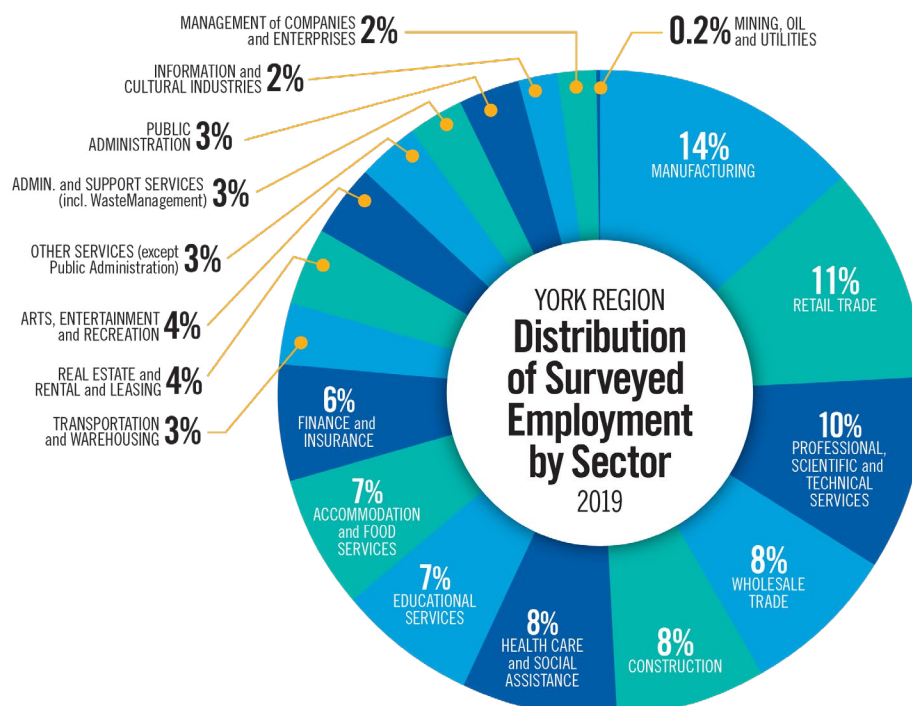
EMPLOYMENT ANALYSIS by SECTOR

The diversity of York Region's employment base provides opportunities for residents

The following section provides a detailed analysis of York Region's employment using Statistics Canada's North American Industrial Classification (NAIC) system. A comprehensive list of the NAIC sectors can be found in Appendix B.

York Region has a diverse economic base. For the past five years the manufacturing, retail trade and professional, scientific and technical services sectors have accounted for the largest share of surveyed employment, as shown in Figure 5. These shares are gradually changing over time, as other sectors such as educational services, finance and insurance and health care and social assistance steadily increase. A diverse economy provides a wide variety of jobs and opportunities for residents. While shifts within employment sectors are expected in the future with emerging new technologies and corresponding changes to employment demands, maintaining diversity of employment across sectors is vital to ensuring a resilient economy.

FIGURE 5 - York Region Distribution of Surveyed Employment by Sector, 2019



Source: York Region Planning and Economic Development Branch, 2019 Employment Survey

YORK REGION EMPLOYMENT ANALYSIS



The York Region economy continues a shift to services-oriented sectors

The share of the Region's workforce in the services-producing sectors continues to grow. In 2019, the majority of the Region's workforce was employed in services-producing sectors, accounting for **78%** of the Region's surveyed employment base, compared to **76%** in 2009 (Figure 6). Employment in the goods-producing sectors accounted for **22%** of the Region's total surveyed employment in 2019 compared to **24%** in 2009.

Employment in the services-producing sectors grew by **9,400 jobs** or **2.1%** between mid-year 2018 and mid-year 2019. During the past ten years, over **125,300** service-oriented jobs were added to the Region's employment base representing an increase of **37.2%** in these sectors.

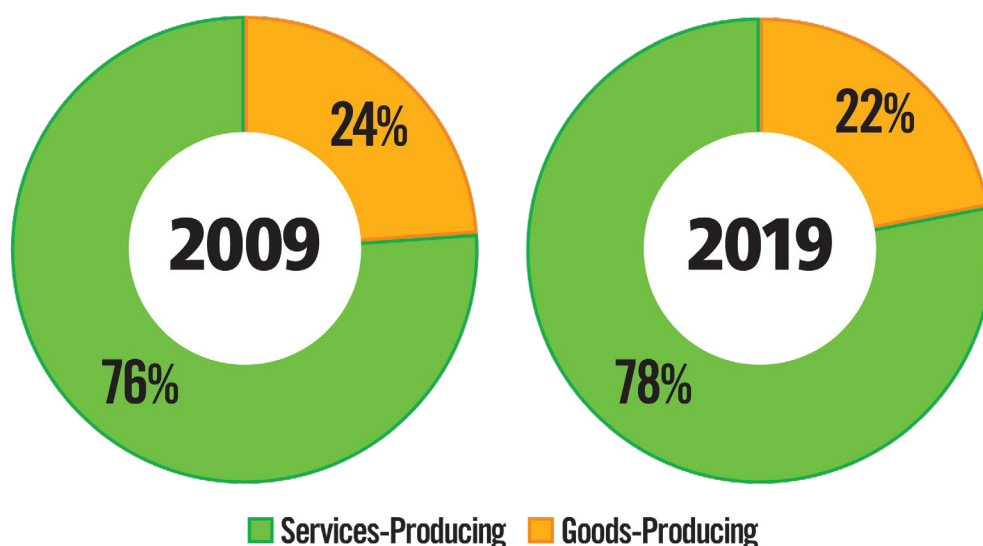
KEY SERVICES-PRODUCING GROWTH SECTORS 2009 and 2019

Education services sector has seen increases nationally, provincially and GTA-wide

The **education services sector** has been one of the fastest-growing sectors between 2009-2019, only second to the real estate sector. This sector has doubled in the number of jobs since 2009, adding over **20,000 jobs** over this ten year period.

According to Statistics Canada Labour Force data, this growth trend has been experienced throughout Canada, Ontario and the GTA with all Region's posting increasing job numbers in this sector over the last five years. The educational services sector includes post-secondary institutions, technical and trade schools, business schools and management training and educational support services.

FIGURE 6 - York Region Surveyed Employment by Goods and Services-Producing Sectors, 2009-2019



Source: York Region Planning and Economic Development Branch, 2009 and 2019 Employment Surveys



YORK REGION EMPLOYMENT ANALYSIS



Finance and insurance sector

Since 2009 the **Finance and insurance sector** has added over **9,600 jobs** in the Region, representing **8%** of total job growth in the last ten years. Major employers such as TD Insurance and Aviva Insurance have their head offices located in the Region. While large firms such as these contribute to this growth, smaller firms and local companies continue to invest in the Region adding to the growth in this sector.

Financial Technology (FinTech) and automation is expected to have high rates of adoption in this sector, leading to more demand for higher skilled and specialized labour force. With over **50 companies** including, XE.com, Real Matters, Everlink Payment Services and more, this segment within the finance and insurance sector is expected to see more growth in the future.

Health care and social services sector has added 18,300 jobs since 2009

Employment growth in the **health care and social services sector** has been strong over the last 10 years in the Region. This sector has grown at an average annual rate of **5.4%** since 2009 adding **18,300 jobs**, making it one of the fastest-growing sectors during this time period. Growth within this sector is expected to continue with the aging population requiring access to healthcare, innovations in technology and the new Mackenzie Vaughan Hospital currently under construction.

Retail Trade represents the largest share of employment in the services-producing sector

The **retail trade sector** is closely tied to population growth and has added almost **10,000 jobs** and grown by **1.7%** annually from 2009-2019. The retail trade sector represents the largest share of employment in the services-producing industry sectors with **11%** or **65,400 jobs**.

Even with this growth, the retail sector's share of growth has been softening since 2009, with a shifting from retail outlets to online sales. E-commerce continues to disrupt and transform the traditional retail sector model. Trends in increasing online shopping experiences are expected to grow and with it bring growth in new sectors such as logistics and warehousing



YORK REGION EMPLOYMENT ANALYSIS



The professional, scientific, and technical services sector added over 1,000 jobs in 2019

Over the past year, **the professional, scientific and technical services sector** recorded over **1,000 additional jobs and accounts** for almost **10% (or 57,700)** of total jobs in the Region. This sector includes subsectors such as information technology, legal services, accounting, engineering and technical services, architectural and interior design services, management consulting and research and development.

Some global companies within the Region in this sector include professional and scientific services companies such as the GM Technical Centre, IBM, AMD, Deloitte, AECOM, Parsons, Worley Parsons, Oracle, Compugen, PwC and WSP Canada.

The real estate and rental and leasing sector has grown by 4.1% over the past year

Employment growth in the **Real Estate and Rental and Leasing sector** increased by **4.1%** from 2018 to 2019, **or 900 jobs**. Changes to mortgage rules in 2018 impacted the real-estate environment, particularly for those buying their first home. However, the real estate sector continues to see employment growth and an increasing share of total employment in the Region.

➔ The construction sector has added over 17,600 jobs to the Region's employment base since 2009. Between 2018 and 2019, the sector grew by 3.3%, or 1,500 jobs.



YORK REGION EMPLOYMENT ANALYSIS

Pace of Annual Growth in Goods-Producing Sector has been steady



KEY GOODS-PRODUCING GROWTH SECTORS

Employment in the Region's goods-producing sectors grew **1.9%** or by **2,400 jobs** between 2018 and 2019. Since rebounding from the recession of 2008, the pace of this growth has been steady. The manufacturing and construction sectors were large contributors to this growth. The manufacturing sector still holds the greatest share of employment in the Region at **14%**.

The construction sector added almost 1,500 jobs over the past year

The **construction sector** has added over **17,600 jobs** to the Region's employment base since 2009. Between 2018 and 2019, the sector grew by **3.3%, or 1,500 jobs**. The total number of jobs by mid-year 2019 in this sector was **46,700**. Growth in the construction sector in the GTA is also tied closely to local population and business growth. The Region plans for population and business growth by investing in critical transportation infrastructure including the Viva Rapidways. It is not surprising that Canada, Ontario and the GTA posted increases in this sector over the last 5 years according to Statistics Canada Labour force data.

The manufacturing sector has held steady over the past decade

Manufacturing jobs continue to hold the largest share of employment in York Region (**14%**). However, the annual growth rate in the goods-producing sector has been **2.2%** during the last ten years, while the services-producing sector has seen a **3.2%** growth rate. The manufacturing subsectors of food manufacturing, plastics and rubber products manufacturing and transportation equipment manufacturing contributed the most to the ten year growth, while petroleum and coal product manufacturing experienced a modest decline. The higher annual growth rate in the services-producing sector is attributed to employment growth in educational services, health care and social assistance and finance and insurance sectors.

The closure of the Oshawa GM Plant is expected to be felt across other manufacturing sectors throughout Ontario. Approximately **16%** of all manufacturing jobs in the Region can be found in the transportation equipment manufacturing subsector, translating into over **13,000 jobs**. Additionally, there are other sectors outside of manufacturing that provide goods or services to the plant. Given the recently announced Canada-United States-Mexico Agreement (CUSMA) as well as the Oshawa GM plant closure, this sector will need to be closely monitored in the future and assessed for potential impacts.

Advanced manufacturing in the Region accounts for **45%** of the total share of employment within the manufacturing sector. Some of the subsectors under this umbrella include audio and video manufacturing, communications equipment medical equipment manufacturers that use advanced production methods or create innovative products. These subsectors within manufacturing have increased **4%** since 2009.



YORK REGION EMPLOYMENT ANALYSIS

KEY GOODS-PRODUCING GROWTH SECTORS

The agri-food sector includes 27 industries in York Region

While the Employment Survey does not survey farms, the Census of Agriculture is used to report out on trends and data in the total employment estimate (Table 2). York Region is home to a vibrant agri-food industry with more than **700 farm-based businesses** and **270 food and beverage manufacturers and distributors** that contribute to the Region's economic vitality.

The agri-food sector in York Region includes everything from farms to processors, food retailers and restaurants, and provides approximately **57,000 jobs** and generates **\$2.7 billion in GDP** for York Region. Based on the 2016 Census of Agriculture, gross farm sales (a measure of farm business income) for primary food production in the Region, grew to approximately **\$301 million**. The primary production sector in York Region provides **3,578 jobs** (direct, indirect and induced).

The food and beverage manufacturing subsector accounts for **9%** of the total share of the manufacturing sector in the Region. This subsector has increased by over **50%** since 2009, adding over **2,100 jobs**. As reported in the 2017 Agriculture and Agri-Food strategy report, the impact of the agri-food industry in York Region is over six billion dollars. Food and beverage manufacturing remains an important subsector to the Region and for many other sectors in the Region, including the retail trade and food and accommodation services.

YORK REGION EMPLOYMENT ANALYSIS



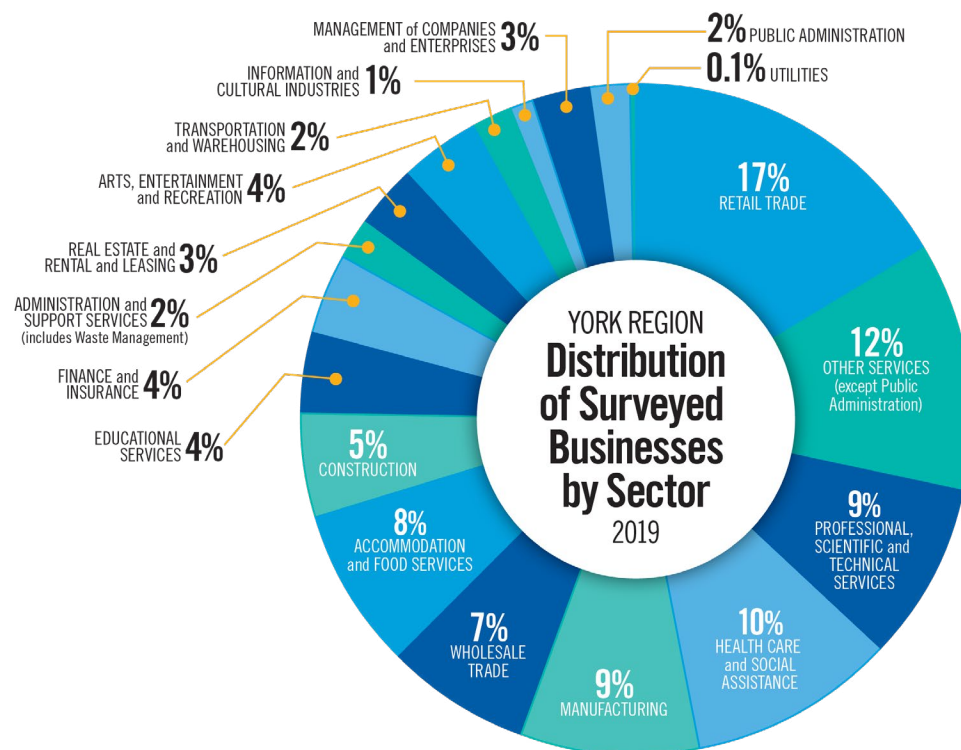
NUMBER of SURVEYED BUSINESS ESTABLISHMENTS

Retail trade holds the largest share of businesses in York Region at 17% and the second largest share of employment at 11%

Over the last five years the number of businesses has grown annually by **2.0%**. The **services producing sectors** make up **86%** of the Region's total number of business establishments with **goods producing sectors** representing a **14%** share. According to the Region's employment survey, the majority of the Region's business growth over the past five years was in **educational services** (+4.3%), the **real-estate and leasing** (+4.1%), **health care and social assistance sectors** (3.5%) and **finance and insurance** (+3.2%).

The distribution of business establishments in the Region is closely tied to the distribution of employment. The **Retail trade sector** holds the largest share of businesses (Figure 7) with **5,800** (17%) and also the second largest share of employment (11%).

FIGURE 7 - Distribution of York Region Surveyed Businesses by Sector, 2019



Source: York Region 2019 Employment Survey, Planning and Economic Development Branch



YORK REGION EMPLOYMENT ANALYSIS

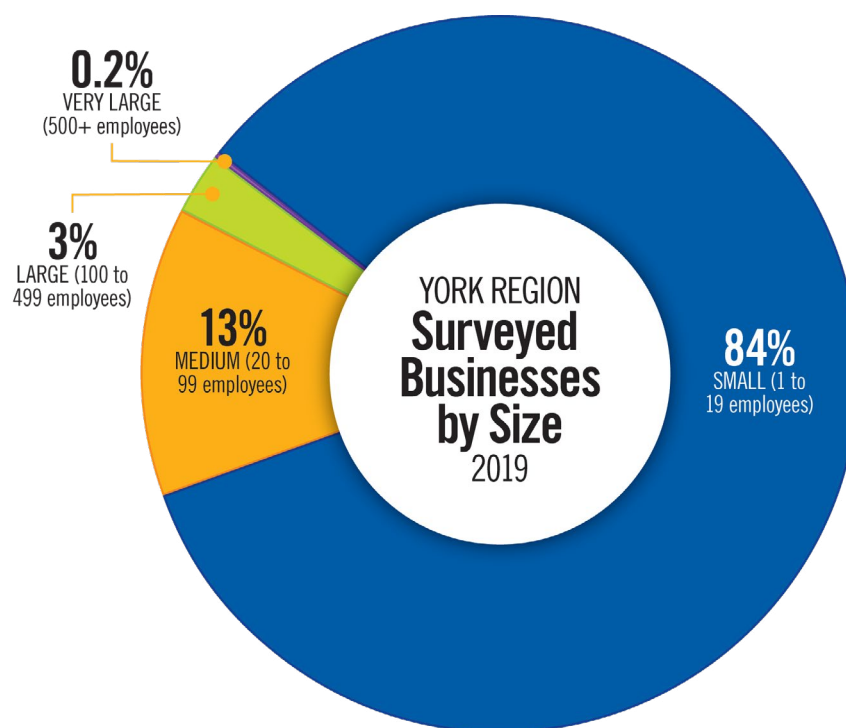
Over 80% of the Region's business community is made up of small businesses

EMPLOYMENT by BUSINESS SIZE

York Region surveyed over **35,400 businesses** in 2019, an **increase of over 8,000** businesses from the 2009 survey. Small businesses (1-19 employees) account for the largest share of the Region's businesses at **84%** or **almost 30,000 businesses** in 2019 (Figure 8). This total share is in line with the share of small businesses throughout the Province and across Canada and is indicative of the important role of small business and entrepreneurship in York Region's economy.

Between 2014-2019 small-size businesses grew by **7.4%** and large-size businesses (100-499 employees) grew by **15.3%**. While the share of Very Large businesses is relatively small at **0.2%** of the Region's total number of establishments, it has grown almost **26%** over the last 5 years (from 49 to 64 businesses) and provides jobs for almost **68,000 employees** (12 per cent of total jobs). The Region's investments in critical infrastructure and the Centres and Corridors program as well as the access to a highly-skilled and diverse workforce continues to attract major employers.

FIGURE 8 - YORK REGION SURVEYED BUSINESSES by SIZE, 2019



Source: York Region 2019 Employment Survey, Planning and Economic Development Branch



FACTORS CONTRIBUTING to ECONOMIC GROWTH in YORK REGION

Strategically located in the heart of the GTA, York Region is home to **over 1.2 million residents**, more than **54,200 businesses** and **over 654,600 jobs** and includes four provincially-designated urban growth centres. According to the Growth Plan, the Region is expected to grow to **1.79 million residents** and **900,000 jobs** by 2041. The Region is well positioned to plan for this growth through continued investments in critical infrastructure.

York Region continues to be a top destination in the Toronto area and Canada for business, talent and investment. The Region's location in the GTHA is also strategic from a goods movement perspective. It is located in close proximity to Toronto Pearson Airport, is home to both the CP intermodal facility and the CN MacMillan rail yard. York Region is within a one day drive to over 140 million people in the United States and a one hour flight to global markets like New York, Philadelphia, Boston, Chicago and Detroit. Additionally, the Region has a strong network of 400-series highways which connect the Region to the broader provincial and national markets as well as the United States border and locally, the Spadina Subway extension (Line 1) into Vaughan that provides a direct connection to the Toronto workforce.

Business and job growth is supported by transit investments, particularly in the Region's Centres and Corridors. The Regional Official Plan plans for the Regional Centres and Corridors to achieve the most intensive and greatest mix of development in the Region, supported by over \$3.6 billion in transit infrastructure investment. As the Region's urban structure continues to evolve and the Regional Centres and Corridors mature, these attributes help maintain and promote York Region's continued competitiveness as a top business location in the Greater Toronto Area.

York Region's economy and local business and employment growth are closely tied with external economic conditions, trends and policies at different levels of government. Examples of factors that have a direct impact on York Region's economic growth prospects include U.S. and global trade agreements, exchange and interest rates, the cost of doing business (e.g. corporate taxes, labour force cost increases, etc.), the labour force pool (e.g. educational institutions, immigration etc.), capital markets and housing.



FACTORS CONTRIBUTING to ECONOMIC GROWTH in YORK REGION

The Region's economy is underlined by core attributes of population and employment growth, skilled labour force, high quality of life that attracts top global talent, established and diversified industry clusters, major infrastructure and transportation investments and locational and accessibility factors among others. Housing options and affordability are key factors in attracting new businesses, retaining existing businesses and attracting a labour force looking for close proximity to work. The Region and the local municipalities continue to work together to ensure a wide variety of housing types and more options at varying levels of affordability are available.

Emerging business practices and market trends also represent challenges and opportunities for York Region's economic growth in both a GTA and a global context. These include business globalization or national protectionism, digital and sharing-economy business models, the shift to contract-based employment, outsourcing, automation, talent attraction practices and many others.

York Region's Economic Development Action Plan addresses key economic challenges and opportunities facing York Region and translates them into innovative economic growth areas. The Region continues to make investments to support business growth and innovation.

CONCLUSIONS



In mid-year 2019, there were an estimated **654,650 jobs** in the Region. York Region recorded employment growth of **2.2%** in 2019 compared to **2.5%** provincially and **2.2%** nationally. York Region is one of Canada's fastest-growing large urban municipalities and is planned and expected to continue to grow in both population and employment for the foreseeable future. The Region is an attractive location to live and invest and is committed to attracting and retaining employers and a diverse workforce, as well as making significant infrastructure investments to support employment and business growth.

While employment in goods-producing sectors continues to have a strong presence in York Region, knowledge-based, service-oriented jobs continue to drive the Region's employment growth. This sustained employment growth continues to diversify the Region's economy and promote economic resilience, vitality and liveability. Attracting and retaining a variety of high quality jobs across a broad range of sectors promotes economic resilience and helps ensure those living in York Region have an opportunity to work and thrive where they live.



With an estimated 654,650 jobs, employment growth in York Region was 2.2% in 2019, compared to 2.5% provincially and 2.2% nationally

APPENDIX A: DATA SOURCES

York Region Employment Survey Methodology



Background

The 2019 survey was a comprehensive Region-wide survey of all businesses across York Region (excluding farm and home-based businesses). Survey data is aggregated throughout the Region by small geographic areas allowing for a detailed examination of local trends and information about local employment areas. York Region's first Region-wide employment survey occurred in 1998, when 21,000 businesses were recorded. Subsequently, an annual survey targeted key employment areas up to 2006, consisting of high-growth areas, designated employment areas and Regional centres. With the assistance of local municipalities, York Region completed Region-wide surveys of all businesses between 2007 and 2019. With a sound annual dataset, the survey will now transition to biannual.

Data Collection

Data collection for the 2019 York Region Employment Survey included all areas across York Region (excluding home and farm based businesses). Data was collected from York Region businesses in a variety of forms:

- Through door-to-door interviews with the business community (primary method);
- Via telephone interviews (for businesses unable to contact in person); and
- Electronically through e-mail messages, online entries via our corporate website and facsimile submissions.

Businesses were contacted primarily through door-to-door interviews between May and August of 2019 by York Region Employment Surveyors. Surveyors used a GIS-based application to collect the business information. All businesses were directly contacted and details about business activity, changes in employment levels and contact information were updated for existing businesses, or initiated for new businesses. Where records showed a business was no longer at the address in 2019, efforts were made to contact the business by phone to establish either a new location, or to record the probable closure of the business. For businesses unable or unwilling to conduct a door-to-door interview, the option was given to either have a surveyor call them at a mutually convenient time or to provide them with a blank survey form and have them complete and return it at their leisure. For businesses that declined to participate or could not be contacted either in person or by telephone during regular office hours, it was assumed that all information relating to that business remained unchanged from the date they were last surveyed.

In 2019, the Region was able to survey 35,400 businesses with a physical location. Approximately 79% of surveyed businesses were successfully contacted. The Region was unable to contact and update 19% of businesses and 2.0% chose not to participate in the survey.



APPENDIX A: DATA SOURCES CONTINUED

York Region staff began collecting business and employment information from farm based businesses in 2012 to compliment the Statistics Canada Census of agriculture. Home-based businesses were encouraged to submit their business information through the Region's online business directory website. Since 2012 the Region has collected information from just over 1,000 home-based businesses, representing approximately 1,300 jobs. It is important to note that the number of home-based businesses captured in the survey represents a small sample of home-based businesses in the Region. According to the 2016 Census there were approximately 48,300 home-based jobs in York Region in 2016.

- Home-based employment rose to an estimated 52,600 jobs in 2019, an increase of approximately 1,500 over 2018
- York Region's home-based employment is increasing every year and has become important to the Region's economy
- Increasing home-employment trend is due to the increasing technological advancements in mobile technology along with progressive employer trends that promote teleworking

In collaboration with the York Region Agricultural Advisory Liaison group and the York Federation of Agriculture, the Region completed its second farm-based business survey in 2016. A letter describing the purpose of the survey and a survey form was distributed in February to just over 700 farm-based businesses. Of the contacted farms, only 8.9 per cent participated in the survey. Due to the small response-size, this procedure was not repeated after 2017. However, regional staff continue to work with the York Federation of Agriculture to increase awareness on the benefits of collecting this information.

Data Uses

Data collected from the employment survey is a valuable resource for both the Region and local municipalities. The data is used by planning and economic development departments, other municipal departments, non-profit organizations and private sector groups. Some of the central uses of the data for the Region and local municipalities include: employment growth forecasts; monitoring targets in the Regional Official Plan and Provincial Growth Plan including employment and density targets for the urban growth centres and intensification areas; forecasting infrastructure requirements in master plans for transportation and water and wastewater; monitoring major office growth; and evidence in legal tribunals. The data is also used for vacant employment land inventories; development charges studies; a tool for identifying economic trends and emerging sectors; and producing regional and local business directories.

Data Accuracy

A number of factors limit the accuracy of the data collected within this report, including:

Data collected was based on responses received from businesses. In certain instances however, businesses refused to participate, had a language barrier, were potentially missed in previous survey years, moved to an unknown location or were temporarily closed. As a result, certain business sectors may be over-represented and others under-represented depending on the particular circumstances of businesses in that sector.

APPENDIX A: DATA SOURCES CONTINUED



While this study analyzes employment patterns in the Region, it does not examine all possible factors that can influence employment rates in a particular location, such as land prices, property tax rates, development charges, and existing space inventories and vacancies. These factors can impact the level of overall economic health in a given area and can also promote or discourage employment growth in one area over another.

The data collected is time-sensitive, in that the information is only accurate as of the date collected. For certain industries undergoing rapid change, the analysis within this report may no longer reflect current circumstances. Caution should therefore be used before making any conclusions based on this information.

Statistics Canada Labour Force Survey

The Statistics Canada Labour Force Survey measures the current state of the Canadian labour market and is used to estimate national, provincial and regional employment and unemployment rates. The survey divides each province into smaller geographic areas and then uses a rotating panel sample design to select dwellings to be surveyed. The monthly sample size has been approximately 56,000 households which results in the collection of labour market data from approximately 100,000 individuals. The data is collected on a monthly basis either by telephone or in person interviews and survey participation is mandatory under the Statistics Act. Information is collected from all household members aged 15 and over.



APPENDIX B: SECTOR DEFINITIONS

Each business surveyed was assigned a numeric code based on their primary business activity. These codes are based on the North American Industrial Classification (NAIC) system, a hierarchical coding system used by statistical agencies in Canada, the U.S. and Mexico to classify businesses by type of economic activity. Much of the analysis in this report aggregates business information based on the NAIC coding at different levels of the hierarchy. The 20 NAIC sectoral categories used by Statistics Canada have been combined to two industry groupings. The combined industry groupings are summarized below:

GOODS-PRODUCING SECTORS

Mining, Oil and Utilities Sector (NAIC 21, 22) This sector comprises establishments primarily engaged in mining, oil and gas extraction and related support activities and operating electric, gas and water utilities. These establishments generate, transmit, control and distribute electric power; distribute natural gas; treat and distribute water; operate sewer systems and sewage treatment facilities; and provide related services, generally through a permanent infrastructure of lines, pipes and treatment and processing facilities.

Construction Sector (NAIC 23) This sector comprises establishments primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing land. This sector includes land development, building and engineering construction and project management and all construction trades contracting (e.g., concrete pouring, roofing, drywall and painting, electrical, fencing).

Manufacturing Sector (NAIC 31-33) This sector comprises establishments primarily engaged in the chemical, mechanical or physical transformation of materials or substances into new products. This sector includes food and beverage manufacturing, textile and clothing production, wood and paper products manufacturing, printing, petrochemical manufacturing, plastics and rubber manufacturing, non-metallic mineral product manufacturing (e.g., bricks, glass, gypsum board), primary metal manufacturing (e.g., iron and steel mills, metal pipes and wire, foundries), fabricated metal product manufacturing (e.g., stamping, metal doors, boilers, hardware, machine shops, nuts and bolts), machinery manufacturing, computer and electronic equipment, electrical equipment and appliances, transportation equipment manufacturing (e.g., motor vehicles and parts, aerospace and boat building) and furniture manufacturing.

APPENDIX B: SECTOR DEFINITIONS CONTINUED



SERVICES-PRODUCING SECTORS

Wholesale Trade Sector (NAIC 41) This sector comprises establishments primarily engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. This sector includes all wholesale distributors, product agents and brokers.

Retail Trade Sector (NAIC 44-45) This sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. Includes all retail stores, retail auto and building supply dealers, gas stations and non-store retailers (e.g., mail order houses, vending machine operators, direct sales).

Transportation/Warehousing Sector (NAIC 48-49) This sector comprises establishments primarily engaged in transporting passengers and goods, warehousing and storing goods, and providing services to these establishments. This sector includes passenger and freight transportation and related support activities (e.g., airports, bus stations, vehicle towing, postal and courier services and warehousing and storage establishments).

Retail Trade Sector (NAIC 44-45) This sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. Includes all retail stores, retail auto and building supply dealers, gas stations and non-store retailers (e.g., mail order houses, vending machine operators, direct sales).

Information and Cultural Studies Sector (NAIC 51) This sector comprises establishments primarily engaged in producing and distributing (except by wholesale and retail methods) information and cultural products. Establishments providing the means to transmit or distribute these products or providing access to equipment and expertise for processing data are also included. The main components of this sector are the publishing industries (e.g. newspaper, book and software publishers), TV and radio broadcasting, telecommunications services, information services (e.g., news syndicates, libraries, and internet providers) and data processing services.

Finance and Insurance Sector (NAIC 52) This sector comprises establishments primarily engaged in financial transactions including monetary authorities, credit intermediation and related activities (e.g., personal and commercial banking, credit unions, credit card issuing, consumer lending, mortgage brokers, transaction processing), securities and commodities trading, portfolio management and investment advising, insurance carriers and brokers and pension funds.

Real Estate and Rental and Leasing Sector (NAIC 53) This sector comprises establishments primarily engaged in renting, leasing or otherwise allowing the use of tangible or intangible assets. Establishments are primarily engaged in managing real estate for others; selling, renting and/or buying of real estate for others; and appraising real estate.



APPENDIX B: SECTOR DEFINITIONS CONTINUED

SERVICES-PRODUCING SECTORS CONTINUED

Professional, Scientific and Technical Services Sector (NAIC 54) This sector comprises establishments primarily engaged in activities in which human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis. The individual industries of this sector are defined on the basis of the particular expertise and training of the service provider. The main components of this sector are legal services; accounting, tax preparation, bookkeeping and payroll services; architectural, engineering and related services; specialized design services; computer systems design and related services; management, scientific and technical consulting services; scientific research and development services; and advertising, public relations, and related services.

Management of Companies and Enterprises Sector (NAIC 55) This sector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions (e.g. holding companies, centralized administrative offices, corporate offices, head offices).

Administrative and Support, Waste Management and Remediation Services Sector (NAIC 56) This sector comprises establishments of two different types: those primarily engaged in activities that support the day-to-day operations of other organizations; and those primarily engaged in waste management activities. The first type of establishment is engaged in activities such as administration, hiring and placing personnel, preparing documents, taking orders from clients, collecting payments for claims, arranging travel, providing security and surveillance, cleaning buildings, and packaging and labeling products. Waste management establishments are engaged in the collection, treatment and disposal of waste material, the operation of material recovery facilities, the remediation of polluted sites and the cleaning of septic tanks.

Education Sector (NAIC 61) This sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centers. These establishments may be privately owned and operated, either for profit or not, or they may be publicly owned and operated.

Health and Social Services Sector (NAIC 62) This sector comprises establishments primarily engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counseling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

APPENDIX B: SECTOR DEFINITIONS CONTINUED



SERVICES-PRODUCING SECTORS CONTINUED

Arts, Entertainment and Recreation Sector (NAIC 71) This sector comprises establishments primarily engaged in operating facilities or providing services to meet the cultural, entertainment and recreational interests of their patrons. The main components of this sector are performing arts, spectator sports industries, heritage institutions (e.g., art galleries, museums, zoos, conservation areas), amusement parks, gambling industry, golf courses and country clubs, skiing facilities, marinas, fitness and recreation centres, restaurants and bars and caterers.

Accommodation and Food Services Sector (NAIC 72) This sector comprises establishments primarily engaged in providing short-term lodging and complementary services to travelers, vacationers and others, in facilities such as hotels, motor hotels, resorts, motels, casino hotels, bed and breakfast accommodations, housekeeping cottages and cabins, recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of recreational and adventure camps. This sector also comprises establishments primarily engaged in preparing meals, snacks and beverages, to customer orders, for immediate consumption on and off the premises.

Other Services Sector (except public administration) (NAIC 81) This sector comprises establishments primarily engaged in repairing, or performing general or routine maintenance (e.g. Automotive repair, machinery repair, reupholstery); providing personal care services (e.g. hair care, funeral homes, laundry services, pet care services, photofinishing); religious organizations and other civic and professional organizations.

Public Administration Sector (NAIC 91) This sector comprises establishments primarily engaged in activities of a governmental nature (e.g. federal, provincial, regional and municipal protective services such as fire, police, courts and correctional facilities, regulatory and administrative service.

For more information on businesses
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