



2022 YORK REGION

EMPLOYMENT and **INDUSTRY** REPORT

A detailed overview of employment and industry trends in York Region

MARCH 2023

TABLE of CONTENTS

INTRODUCTION and 2022 HIGHLIGHTS	3
2022 EMPLOYMENT SURVEY CHALLENGES	4
2022 EMPLOYMENT SURVEY CHALLENGES	5
DATA DISCLAIMERS	6
NATIONAL, PROVINCIAL and YORK REGION OVERVIEW	7
COVID-19 PANDEMIC IMPACT on CANADA, ONTARIO, and YORK REGION EMPLOYMENT	7
GOODS vs. SERVICES-PRODUCING SECTORS	8
YORK REGION EMPLOYMENT	9
EMPLOYMENT by TYPE of WORKER	10
EMPLOYMENT SECTOR DISTRIBUTION	12
SECTOR TRENDS - 2019 to 2022	13
EMPLOYMENT GROWTH from NEW SURVEYED BUSINESSES	14
EMPLOYMENT DECLINE from BUSINESS CLOSURES	15
CATEGORIZING BUSINESS CLOSURES	16
NET JOB GROWTH and DECLINE from NEW SURVEYED BUSINESSES and BUSINESS CLOSURES - 2019 to 2022	18
GOODS-PRODUCING SECTORS - 2019 to 2022 KEY TRENDS	20
SERVICES-PRODUCING SECTORS - 2019 to 2022 KEY TRENDS	20
10-YEAR SECTOR TRENDS - 2012 to 2022	22
KEY GOODS-PRODUCING SECTORS - 10-YEAR KEY TRENDS	23
KEY SERVICES-PRODUCING SECTORS - 10-YEAR KEY TRENDS	24
YORK REGION BUSINESSES	25
BUSINESS SIZE	25
BUSINESSES by SECTOR	26
NEW SURVEYED BUSINESSES 2019 to 2022	28
BUSINESS CLOSURES 2019 to 2022	29
CATEGORIZING BUSINESS CLOSURES	30
10-YEAR SECTOR TRENDS	32
FACTORS CONTRIBUTING to ECONOMIC GROWTH	33
CONCLUSIONS	35
APPENDIX A: METHODOLOGY and DATA SOURCES	36
APPENDIX B: SECTOR DEFINITIONS	39
GOODS-PRODUCING SECTORS	39
SERVICES-PRODUCING SECTORS	39

INTRODUCTION and 2022 HIGHLIGHTS



2022 EMPLOYMENT SURVEY

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 with a physical location across the Region's nine local municipalities. The data is collected from May to August and is aggregated for reporting and monitoring. The employment survey provides a snapshot of the Region's business community and corresponding employment that can be compared over time to identify trends. This information provides market indicators and trend analysis that inform 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 **2022 Employment and Industry Report** provides an overview of the Region's business and employment characteristics and trends.

Employment and business analysis throughout the report uses Statistics Canada's North American Industrial Classification (NAIC) system. NAIC sectors are separated as goods-producing and services-producing sectors throughout the report. Goods-producing industries are primarily associated with the production of goods whereas services-producing industries are primarily associated with the production of services. A comprehensive list of the NAIC sectors can be found in Appendix B.

Other sources of information used within the report include Conference Board of Canada data, Statistics Canada Survey of Employment, Payrolls and Hours (SEPH) data, Canadian Business Counts data, Census of Agriculture and 2021 Census data. Further details regarding data sources and methodology are contained within appendices A and B.

✓ 2022 SURVEY HIGHLIGHTS

2022 YORK REGION JOBS

615,760 Jobs¹ ESTIMATED
YORK REGION EMPLOYMENT

27,620 Jobs
NET JOB GROWTH since 2019

Real Estate (11.7% increase)
FASTEST ANNUAL GROWTH SECTOR SINCE 2012

Health Care (+6,950 Jobs)
LARGEST JOB INCREASE since 2019

Manufacturing (14%)
HIGHEST EMPLOYMENT SHARE

2022 YORK REGION BUSINESSES

33,110 Businesses
SURVEYED in 2022

4,710 NEW Businesses
OPENED since 2019

6,490 Business CLOSURES²
Since 2019

**82% of York Region
Businesses are SMALL**
BUSINESSES with ONE to 19 EMPLOYEES

Retail Trade (16%)
TOP SECTOR by BUSINESS COUNT

Notes: ¹Excludes estimates for work at home, a task completed in previous Employment and Industry reports. ²Includes business closures, businesses not found at location while surveying in 2019 and 2022 nor through web presence, and businesses that have moved out of York Region.

2022 EMPLOYMENT SURVEY CHALLENGES



Due to the COVID-19 pandemic, the last employment survey was undertaken in 2019. The pandemic presented several challenges while conducting the 2022 employment survey resulting in a lower response rate than in previous years, including:

- Business parks, office buildings, and medical offices operating by appointment only made it difficult for surveyors to successfully enter some buildings and survey businesses
- Some long-term care facilities requiring a negative COVID-19 test to enter their facility impacting the ability to survey these establishments
- More businesses operating remotely or temporarily from home impacted surveyors' ability to get in contact with businesses for employment information
- Obtaining work from home employment information from large businesses was difficult as surveyors found many do not have an accurate count of work at home employees
- Surveyors becoming ill were be unable to go back out in the field until they were symptom free
- Some businesses refusing to participate in the survey because surveyors had medical masks on

These challenges impacted the survey response rate which declined to **64%** from an average of **81%** in prior surveys. Survey response rates for each sector are listed in Table 1. Medium-sized (20-99 employees) and large-sized (100+ employees) businesses had stronger response rates at **71%** (Table 2).

2022 EMPLOYMENT SURVEY CHALLENGES

TABLE 1: EMPLOYMENT SURVEY RESPONSE RATES by SECTOR - 2022

EMPLOYMENT SECTOR	Response Rate
Public Administration	66%
Other Services (except Public Admin.)	63%
Accommodation and Food Services	67%
Health Care and Social Assistance	64%
Educational Services	57%
Business, Building and Other Support Services	56%
Professional, Scientific and Technical Services	56%
Finance and Insurance and Real Estate and Rental and Leasing	58%
Information and Cultural Industries and Arts, Entertainment and Recreation	58%
Transportation and Warehousing	62%
Wholesale and Retail Trade	69%
Manufacturing	69%
Construction	61%
Utilities	41%
Mining and Oil and Gas Extraction	67%
2022 RESPONSE RATE	64%

Source: York Region Planning and Economic Development Branch, 2022 Employment Survey

TABLE 2: EMPLOYMENT SURVEY RESPONSE RATES by BUSINESS SIZE - 2022

BUSINESS SIZE	Response Rate
Small (1 to 19 Employees)	62%
Medium (20 to 99 Employees)	71%
Large (100 to 499 Employees)	72%
Very Large (500+ Employees)	68%
2022 RESPONSE RATE	64%

Source: York Region Planning and Economic Development Branch, 2022 Employment Survey

DATA DISCLAIMERS



EMPLOYMENT SURVEY DATA

The 2022 employment figures in this report are based on information obtained from businesses surveyed successfully and also include estimates of the number of jobs for businesses surveyors were unable to contact. The methodology for determining job estimates for businesses surveyors were unable to contact is outlined in Appendix A. All survey data was collected between May and August 2022 and employment figures exclude farm-based and home-based businesses, as further described below. Employment figures from historical years in this report are consistent with the 2022 survey figure for comparison purposes in that work at home estimates have been removed. The employment survey does not survey farms due to extensive time and resources required. The Census of Agriculture for York Region is used as it is comprehensive in providing the necessary employment estimate for farm-based businesses. Due to rounding, figures in this report may not add up to totals provided.

WORK at HOME ESTIMATE

Previous Employment and Industry reports included estimates of total employment in the Region by including estimates for work at home using Statistics Canada census data. Due to the COVID-19 pandemic and the changing nature of work, work at home employment for the Region's employed labour force, increased substantially from approximately **49,000, or 9%** of the employed labour force in 2016 to **over 196,000, or 36%** of the employed labour force in 2021. In 2022, to obtain work from home data from employers, surveyors asked each business for the total number of employees working from home in addition to those working in the office, whereas in previous years this question was not asked. Most businesses were unable to differentiate between employees working in the office versus those working at home. To avoid potential double counting of jobs, an estimate for work at home was excluded from York Region's employment estimate for 2022. The Region's 2022 employment estimate is therefore not directly comparable to total employment figures provided in previous reports. For this report, previous year employment estimates have been revised by removing work at home in order to monitor trends.

CANADIAN BUSINESS COUNT (CBC) DATA

According to the Statistics Canada's Canadian Business Counts (CBC) database, York Region is home to **over 55,600** business establishments. The CBC database is based on the Canadian Business Register and is more inclusive as it uses business registration numbers as the basis for their business counts. The CBC database also includes home-based and household employers that have filed a federal income tax within the past three years, whereas the York Region employment survey does not account for home-based businesses and also removes businesses with no confirmed physical location for 2 surveys nor web presence, which may be captured in the CBC data. The CBC data is recognized by municipalities across the country as the standard for business count comparisons. Only surveyed businesses with a physical location have been used for the employment and business trend analysis throughout the report.

NATIONAL, PROVINCIAL and YORK REGION OVERVIEW



COVID-19 Pandemic Impact on Canada, Ontario, and York Region Employment

Conference Board of Canada (CBOC) data and Statistics Canada data can be used to compare the impact of the COVID-19 pandemic for York Region, Ontario, and Canada. Although an employment survey was not completed in 2020 and 2021, the Conference Board of Canada (CBOC) employment estimate for York Region can be used for comparison to Statistic Canada employment estimates for the provincial and national economies. The CBOC data indicates York Region was less impacted than other economic regions recording a decline of 4% between mid-year 2019 and mid-year 2020. The hardest-hit sectors across national, provincial, and York Region economies included accommodation and food services, arts, entertainment and recreation, transportation and warehousing, construction, manufacturing, and wholesale and retail trade.

Strong recovery in the Region, in line with other economic regions, was evident between mid-year 2020 and mid-year 2021, and this trend continued in 2022. Since the Region's last employment survey in 2019, the sectors driving employment growth across Canada, Ontario, and York Region included professional, scientific and technical services, real estate and rental and leasing, health care and social assistance, public administration and construction. Table 3 displays how York Region's annual employment growth rates, over the course of the pandemic, compared to Canada and Ontario.

TABLE 3: ANNUAL EMPLOYMENT GROWTH RATES in CANADA, ONTARIO and YORK REGION - 2019 to 2022

ECONOMIC REGION	2019 to 2020	2020 to 2021	2021 to 2022	2019 to 2022
Canada	-9%	8%	5%	3%
Ontario	-10%	8%	6%	3%
York Region¹	-4%	6%	3%	5%

Source: Statistics Canada Employment by industry, monthly, seasonally unadjusted (x1,000), the Conference Board of Canada and York Region Planning and Economic Development Branch, 2022 Employment Survey. **Note:** ¹2020 and 2021 employment growth rates based on Conference Board of Canada data.

NATIONAL, PROVINCIAL and YORK REGION OVERVIEW

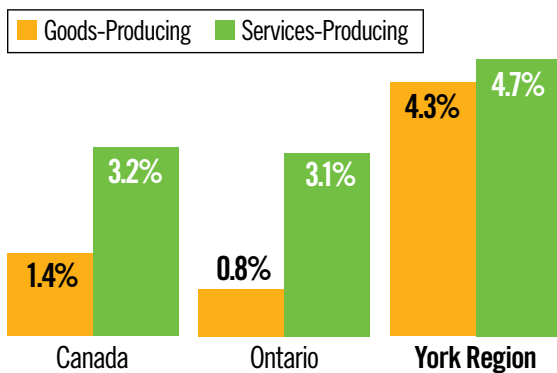
GOODS vs. SERVICES-PRODUCING SECTORS

Growth since 2019 in the Canadian and Ontario economies have been driven by services-producing sectors. York Region has recorded more balanced growth in goods and services-producing sectors (Figure 1).

Annually, over the past 10-years, services-producing and goods-producing jobs in the Region are growing at a faster rate than national and provincial averages (Figure 2).

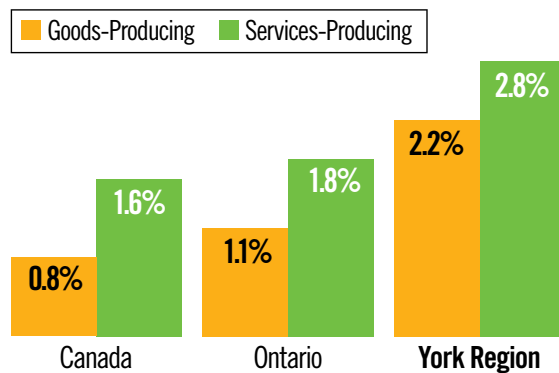
The distribution of jobs between goods-producing and services-producing sectors has remained relatively steady since 2012 hovering around **22%** and **78%** respectively. In the last 20 years, share of jobs in the Region has favored services-producing sectors increasing from **70%** of the Region's employment to **78%** (Figure 3). Share of goods-producing jobs has **decreased 30% to 22%** (Figure 4).

FIGURE 1: GOODS and SERVICES-PRODUCING SECTOR GROWTH RATES from 2019 to 2022



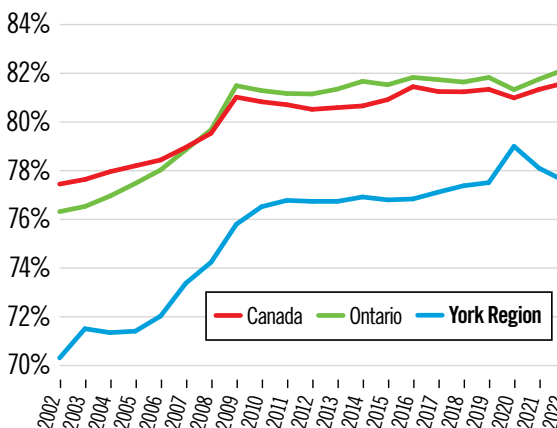
Source: Statistics Canada Employment by industry, monthly, seasonally unadjusted (x1,000), the Conference Board of Canada and York Region Planning and Economic Development Branch

FIGURE 2: AVERAGE ANNUAL GROWTH RATES from 2017 to 2022



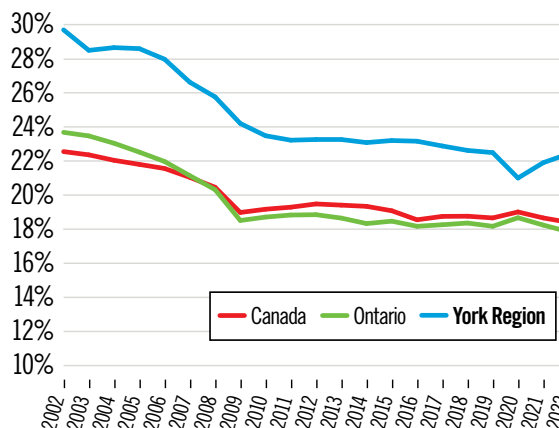
Source: Statistics Canada Employment by industry, monthly, seasonally unadjusted (x1,000), the Conference Board of Canada and York Region Planning and Economic Development Branch

FIGURE 3: SHARE of SERVICES-PRODUCING EMPLOYMENT from 2002 to 2022



Source: Statistics Canada Employment by industry, monthly, seasonally unadjusted (x1,000), the Conference Board of Canada and York Region Planning and Economic Development Branch

FIGURE 4: SHARE of GOODS-PRODUCING EMPLOYMENT from 2002 to 2022



YORK REGION EMPLOYMENT

615,760 ESTIMATED JOBS¹ in 2022

As of mid-year 2022, not accounting for potential growth in work at home jobs, York Region's employment was estimated to be 615,760 jobs. Table 4 outlines how the 2022 employment estimate was derived.

TABLE 4: YORK REGION EMPLOYMENT ESTIMATE 2022

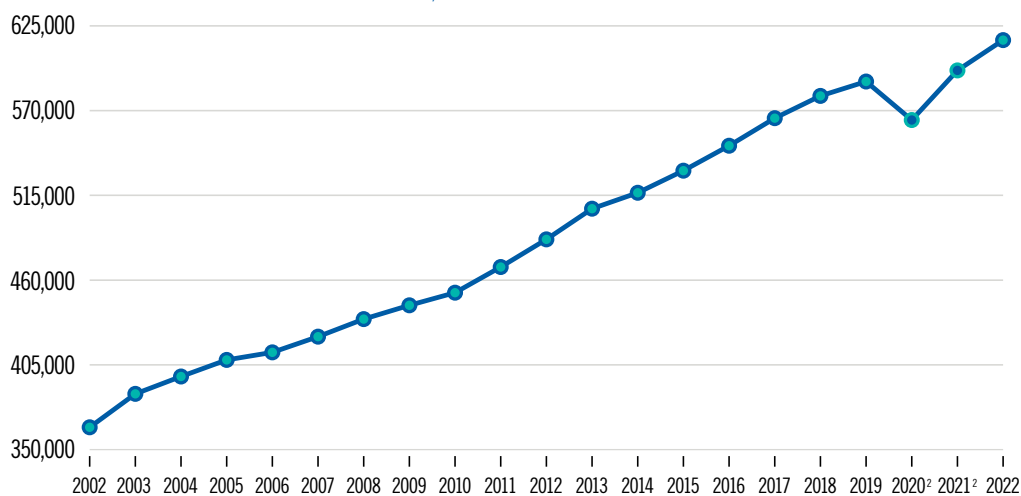
Employment Estimate Type	Employment Estimate ¹
Surveyed Employment	406,504
No Contact Estimate	206,741
Agriculture Employment	2,515
TOTAL	615,670

Source: York Region Planning and Economic Development Branch, 2022.

Note: ¹Employment estimate excludes home-based businesses and work at home estimates.

Since 2002, employment in the Region has grown by over **251,000 jobs** (Figure 6) representing a strong average annual growth rate of **2.7%**. This rate of growth continues to align with the population growth rate for the same period (3%) and provides job opportunities for existing and future York Region residents, in line with the **2022 York Region Official Plan** target of one job for every two residents.

FIGURE 5: ESTIMATED EMPLOYMENT GROWTH, 2002 to 2022



Source: York Region Planning and Economic Development Branch, 2022 and the Conference Board of Canada. Notes: ²Employment estimates based on York Region Employment survey data except 2020 and 2021, which are based on Conference Board of Canada employment growth rates for York Region.

³Employment for all years excludes work at home estimates.

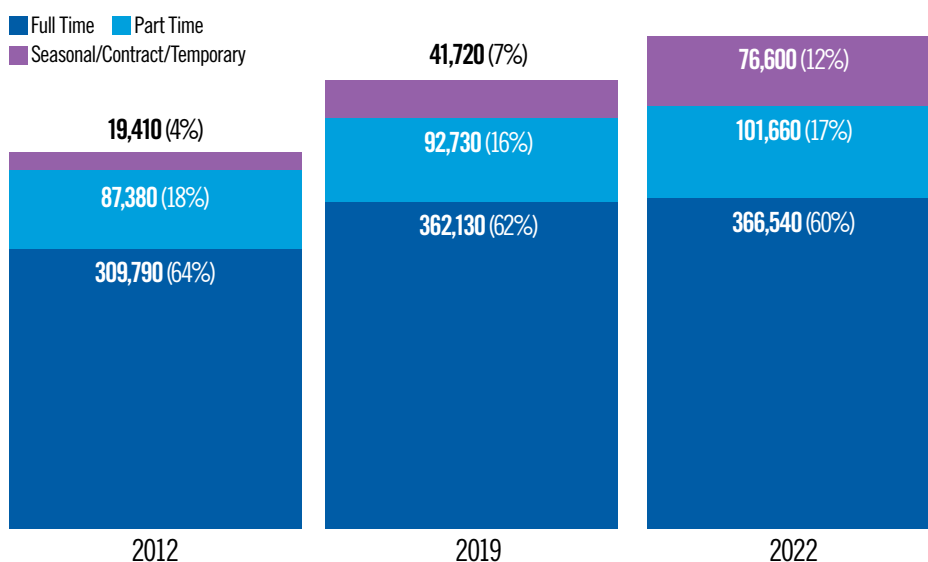
YORK REGION EMPLOYMENT

EMPLOYMENT by TYPE of WORKER

Over the past 10-years, contract/seasonal/temporary employment has been the fastest growing type of work increasing from a 4% share in 2012 to 12.5% in 2022. Since 2019, contract/seasonal/temporary employment **increased by 84%**, or **34,880 jobs** (Figure 6). The dramatic rise of contract/seasonal/temporary employment suggests employers may be grappling with the unpredictable times and market volatility since the COVID-19 pandemic started in early 2020. Temporary work arrangements offer employers more flexibility to operate efficiently as demand for products and services fluctuates.

The share of part time employment has decreased from 18% in 2012 to 16.6% in 2022, impacted by the rise in seasonal/contract/temporary employment. Although full time employment **grew by 4,410 jobs** between 2019 and 2022, its share of employment also **decreased from 64% in 2012 to 60% in 2022**.

FIGURE 6: EMPLOYMENT by TYPE of WORKER, 2012 to 2022



Source: York Region Planning and Economic Development Branch, 2022

Map 1 displays the spatial distribution of jobs across York Region.

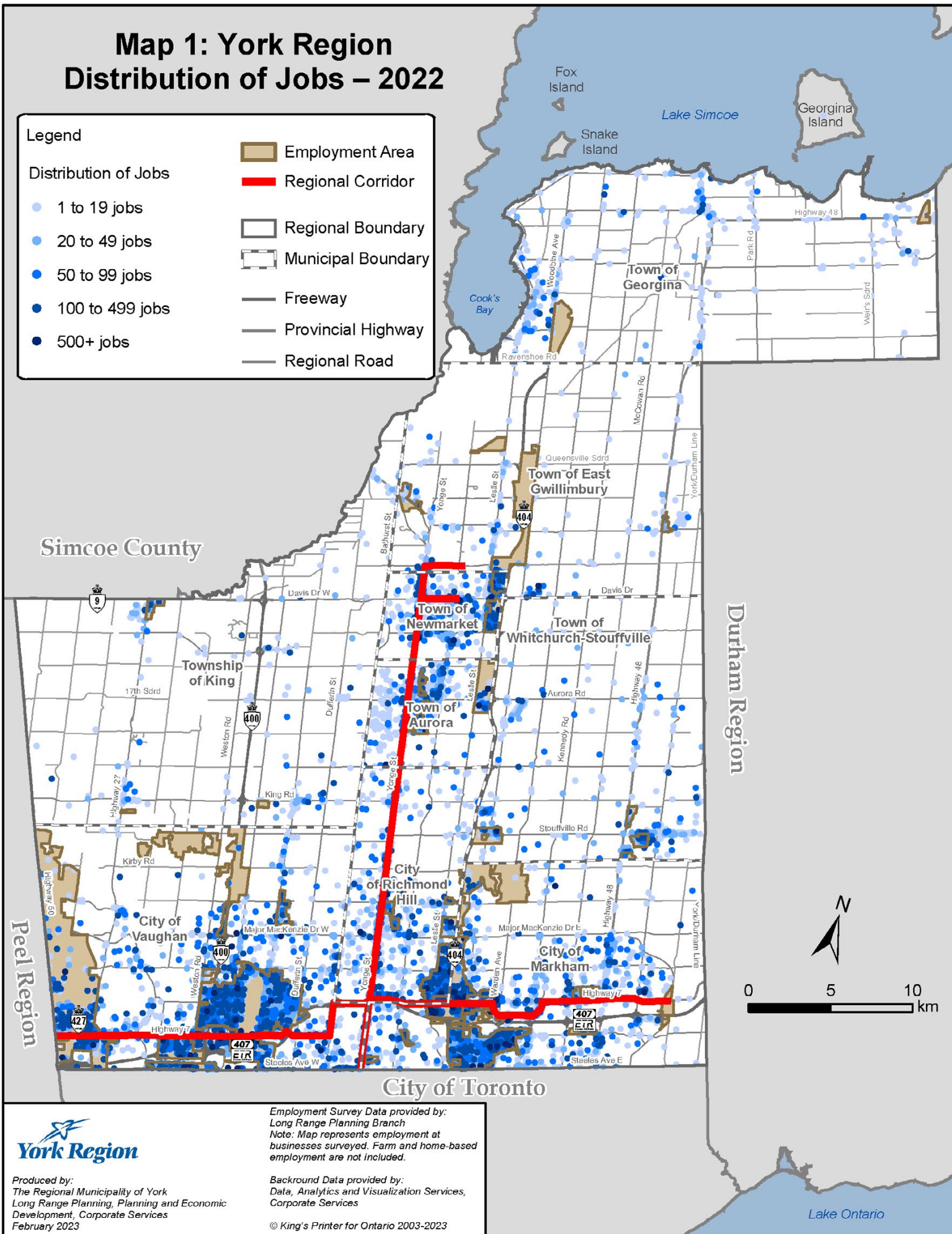
Map 1: York Region Distribution of Jobs – 2022

Legend

Distribution of Jobs

- 1 to 19 jobs
- 20 to 49 jobs
- 50 to 99 jobs
- 100 to 499 jobs
- 500+ jobs

- Employment Area
- Regional Corridor
- ▭ Regional Boundary
- ▭ Municipal Boundary
- Freeway
- Provincial Highway
- Regional Road



Produced by:
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Development, Corporate Services
February 2023

Employment Survey Data provided by:
Long Range Planning Branch
Note: Map represents employment at
businesses surveyed. Farm and home-based
employment are not included.

Background Data provided by:
Data, Analytics and Visualization Services,
Corporate Services

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Lake Ontario

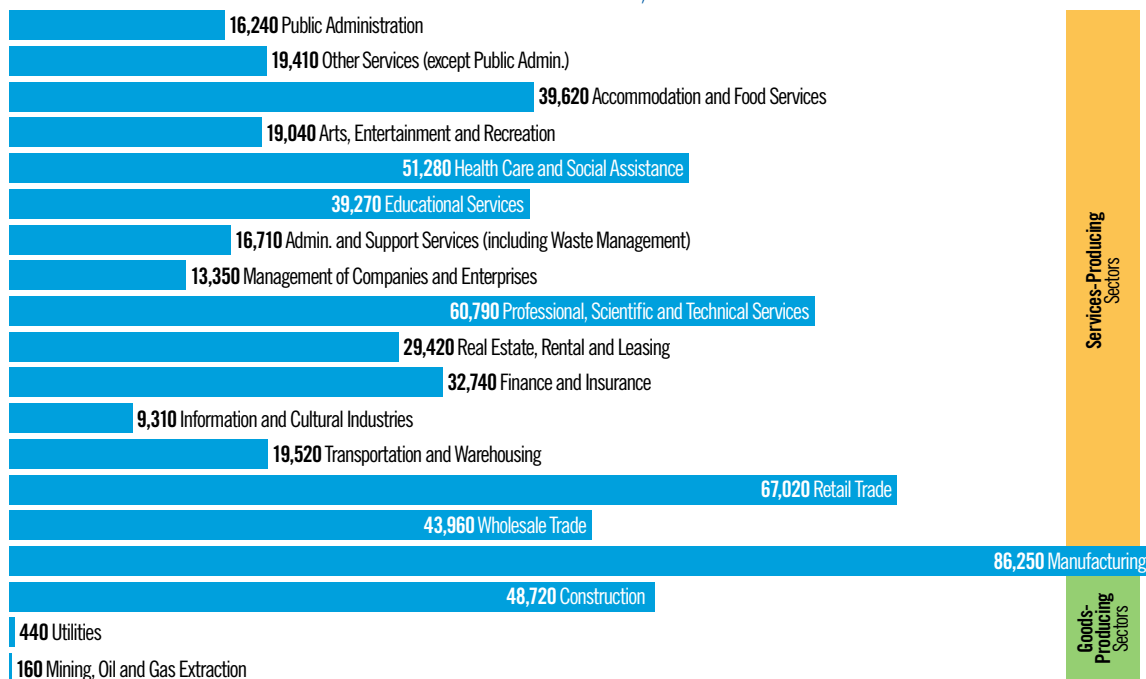
YORK REGION EMPLOYMENT

EMPLOYMENT SECTOR DISTRIBUTION

York Region has a diverse economic base with employment across a broad range of sectors. A diverse economy provides a wide variety of jobs and opportunities for residents. This has proven to be vital to maintaining the Region's resiliency, especially through the COVID-19 pandemic as a more diverse economy was less sensitive to job decline.

In 2022, York Region's top sectors by surveyed employment included manufacturing, retail trade, professional, scientific and technical services sector, health care and social assistance, and construction (Figure 7).

FIGURE 7: YORK REGION DISTRIBUTION of SURVEYED EMPLOYMENT, 2022



Source: York Region Planning and Economic Development Branch, 2022. **Note:** Employment excludes at home estimates.



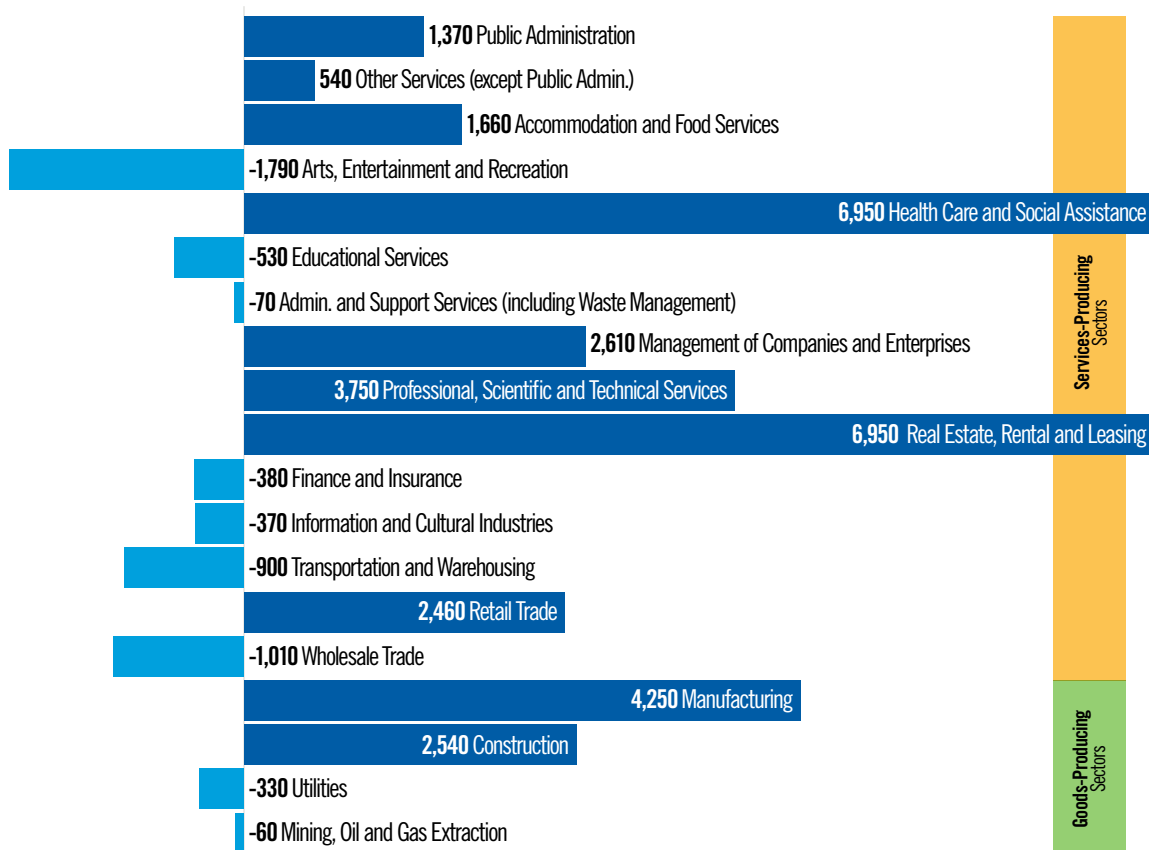
YORK REGION EMPLOYMENT

SECTOR TRENDS - 2019 to 2022

The COVID-19 pandemic impacted business and employment growth throughout the Region. Sectors most affected by business closures since 2019 included professional, scientific and technical services, retail trade, wholesale trade, manufacturing, and accommodation and food services.

Although many sectors were impacted by widespread lockdowns and supply chain shortages in 2020, most also experienced subsequent growth as COVID-19 restrictions eased in 2021 and 2022 indicating York Region's business community has recovered well from the impacts of the pandemic. Sectors that recorded the strongest job recovery include health care and social assistance, real estate and rental and leasing, manufacturing, professional, scientific and technical services, and management of companies and enterprises. Some sectors, notably Arts, Entertainment and Recreation, Wholesale Trade, and Transportation and Warehousing are slower to recover. Figure 8 displays how employment in each sector has changed since 2019 in York Region.

FIGURE 8: YORK REGION EMPLOYMENT CHANGE by SECTOR, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022. **Note:** Employment excludes work at home estimates.

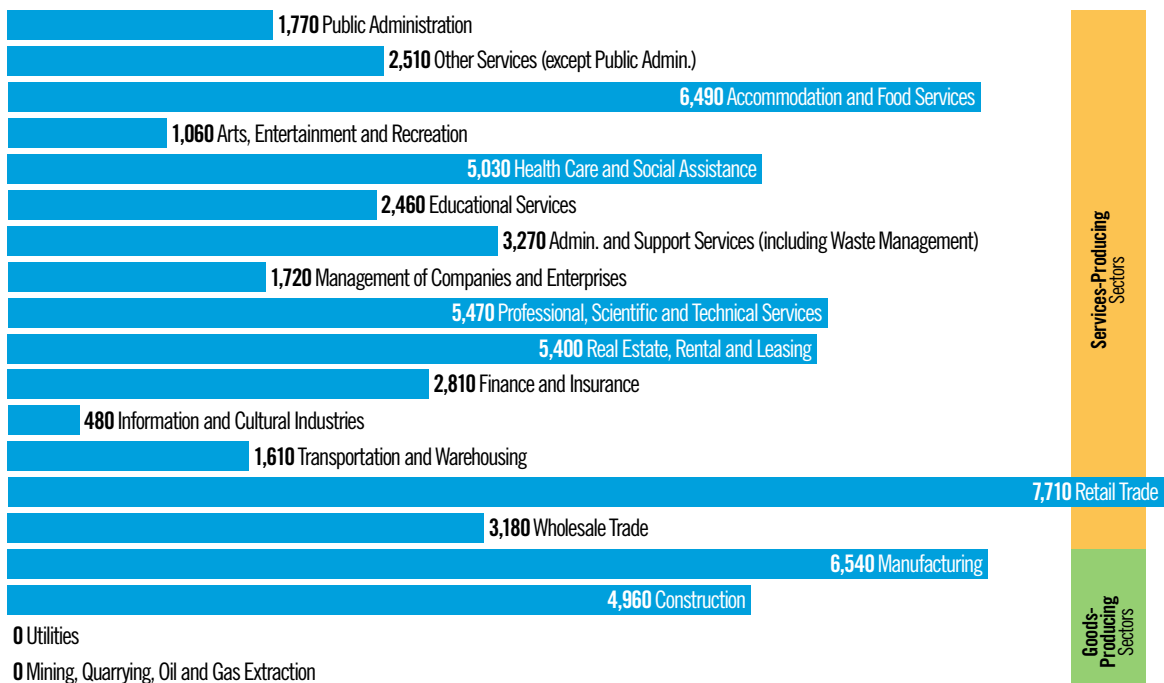
A variety of factors have contributed to employment growth and decline since 2019 including employment growth from new businesses and existing business expansions, and employment decline from closed business establishments, businesses that have moved out of York Region, and businesses not found at location in 2019 and 2022. The next sections provide a detailed analysis of employment growth and decline between 2019 and 2022, and the impact new and closed business establishments had on the Region's employment.

YORK REGION EMPLOYMENT

62,460 JOB GROWTH from NEW BUSINESSES between 2019 and 2022

EMPLOYMENT GROWTH from NEW SURVEYED BUSINESSES

FIGURE 9: JOB GROWTH from NEW SURVEYED BUSINESSES by SECTOR, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022

JOB GROWTH FROM NEW SURVEYED BUSINESSES 2019 TO 2022

TOP 5

- Retail Trade** 12% +7,710 Jobs
- Manufacturing** 10% +6,540 Jobs
- Accommodation and Food Services** 10% +6,490 Jobs
- Professional, Scientific and Technical Services** 9% +5,470 Jobs
- Real Estate and Rental and Leasing** 9% +5,400 Jobs

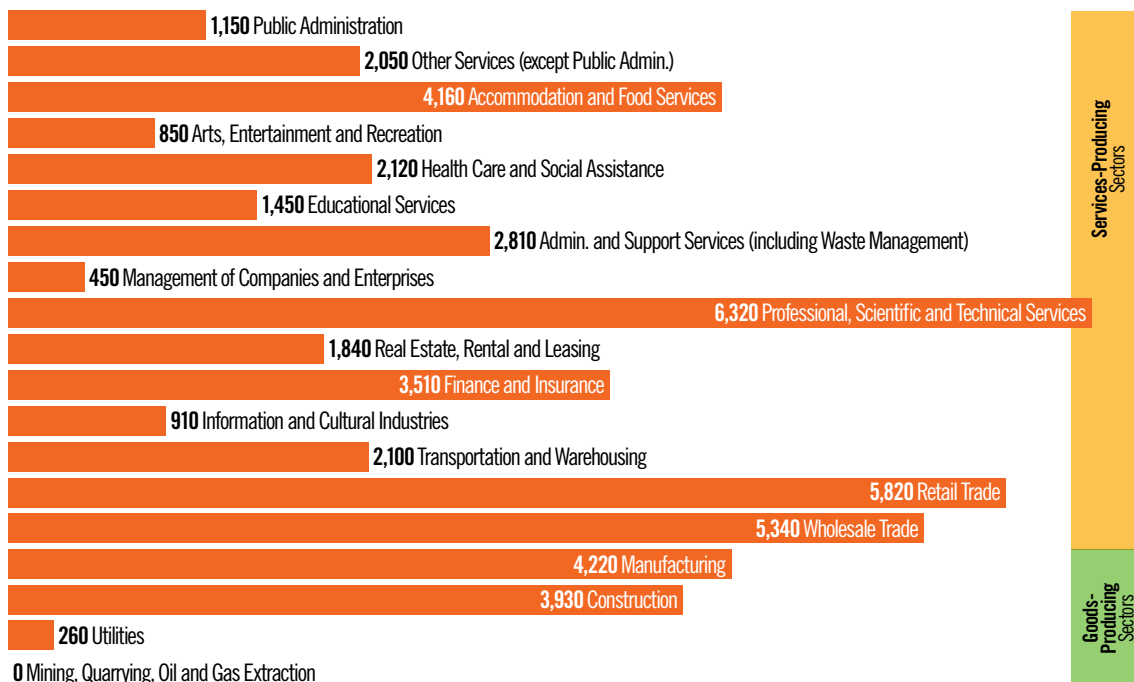
Source: York Region Planning and Economic Development Branch, 2022

YORK REGION EMPLOYMENT

49,290¹ JOB DECLINE from BUSINESS CLOSURES between 2019 and 2022

EMPLOYMENT DECLINE from BUSINESS CLOSURES

FIGURE 10: Job Decline from Business Closures, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022

JOB DECLINE FROM BUSINESSES CLOSURES 2019 TO 2022

- TOP 5**
- Professional, Scientific and Technical Services 13%** -6,320 Jobs
 - Retail Trade 12%** -5,820 Jobs
 - Wholesale Trade 11%** -5,340 Jobs
 - Manufacturing 9%** -4,220 Jobs
 - Accommodation and Food Services 8%** -4,160 Jobs

Source: York Region Planning and Economic Development Branch, 2022

Note: ¹ Includes business closures (29,140 jobs), businesses not found at location in 2019 and 2022 (11,860 jobs), and businesses that have moved out of York Region (8,290) jobs.

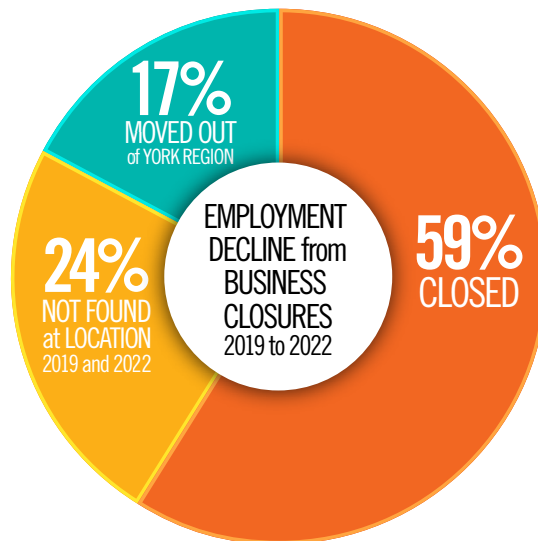
YORK REGION EMPLOYMENT

CATEGORIZING BUSINESS CLOSURES

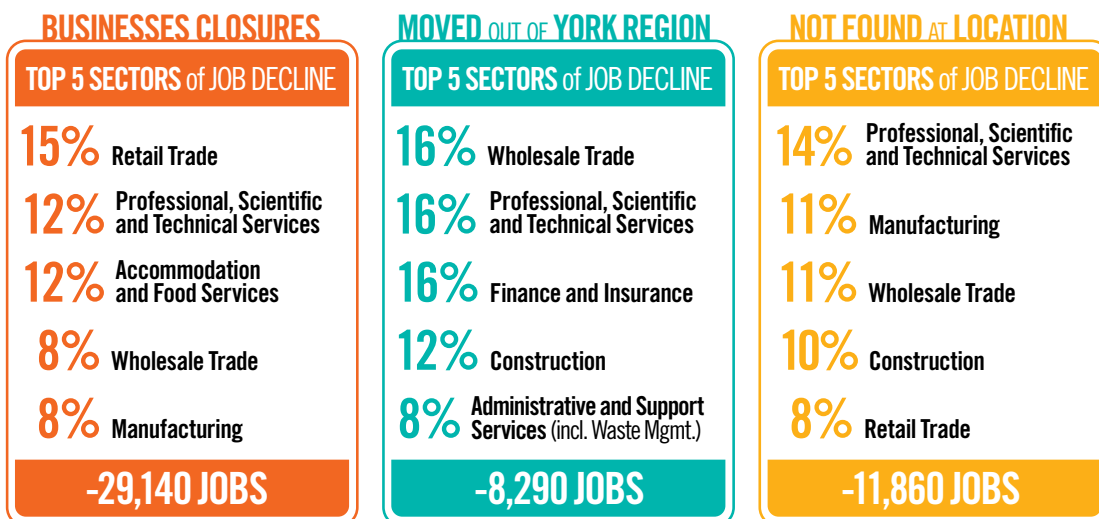
There are three different categories explaining what falls under business closures between 2019 and 2022.

- 1. Business Closures:** businesses that have closed between 2019 and 2022
- 2. Moved out of York Region:** businesses that have relocated to a new location outside of York Region
- 3. Not Found at Location (NFAL) in 2019 and 2022:** businesses that were identified as not found at location while surveying in 2019 and 2022. Staff undertook a comprehensive review of businesses identified as not found at location in two consecutive surveys (2019 and 2022). Employment estimates for these businesses were included in the reported 2019 total employment figures. If surveyors were unable to locate them again or identify them online in 2022, they were deemed closed.

FIGURE 11: EMPLOYMENT DECLINE from BUSINESS CLOSURES by REASON, 2019 to 2022



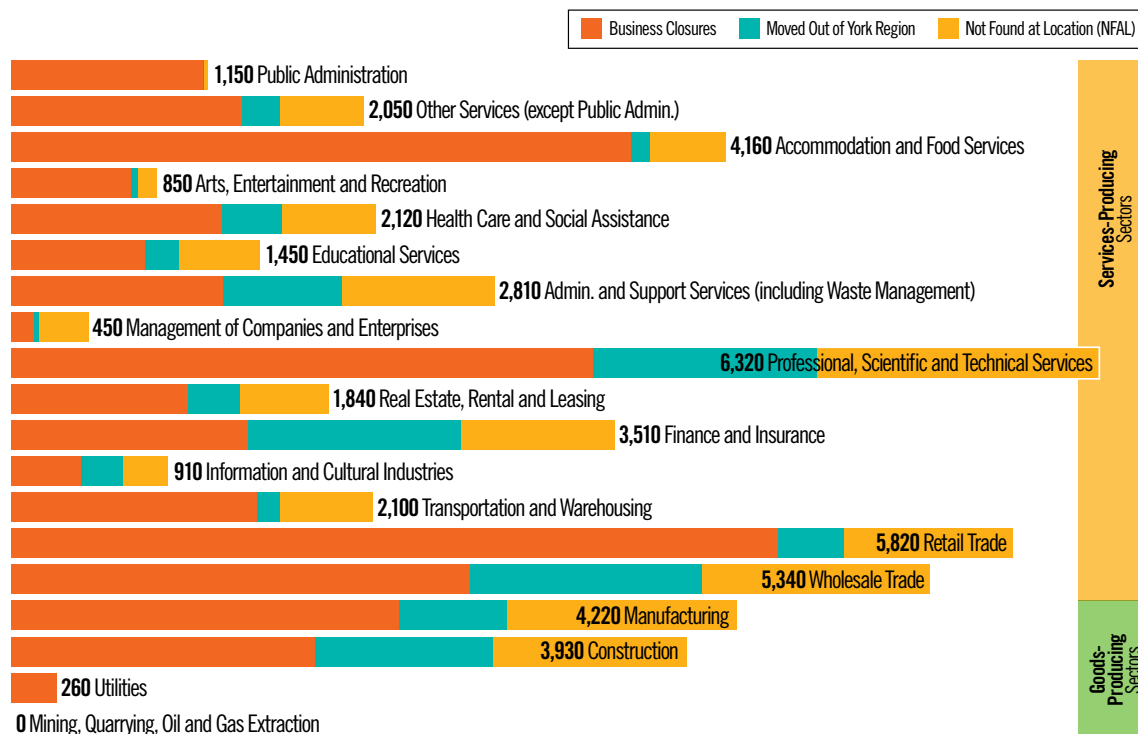
Source: York Region Planning and Economic Development Branch, 2022



YORK REGION EMPLOYMENT

Figure 12 shows the amount of employment decline from business closures, businesses that have moved out of York Region, and businesses that were Not Found at Location (NFAL) in 2019 and 2022 in each sector.

FIGURE 12: Employment Decline from Business Closures by Sector, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022



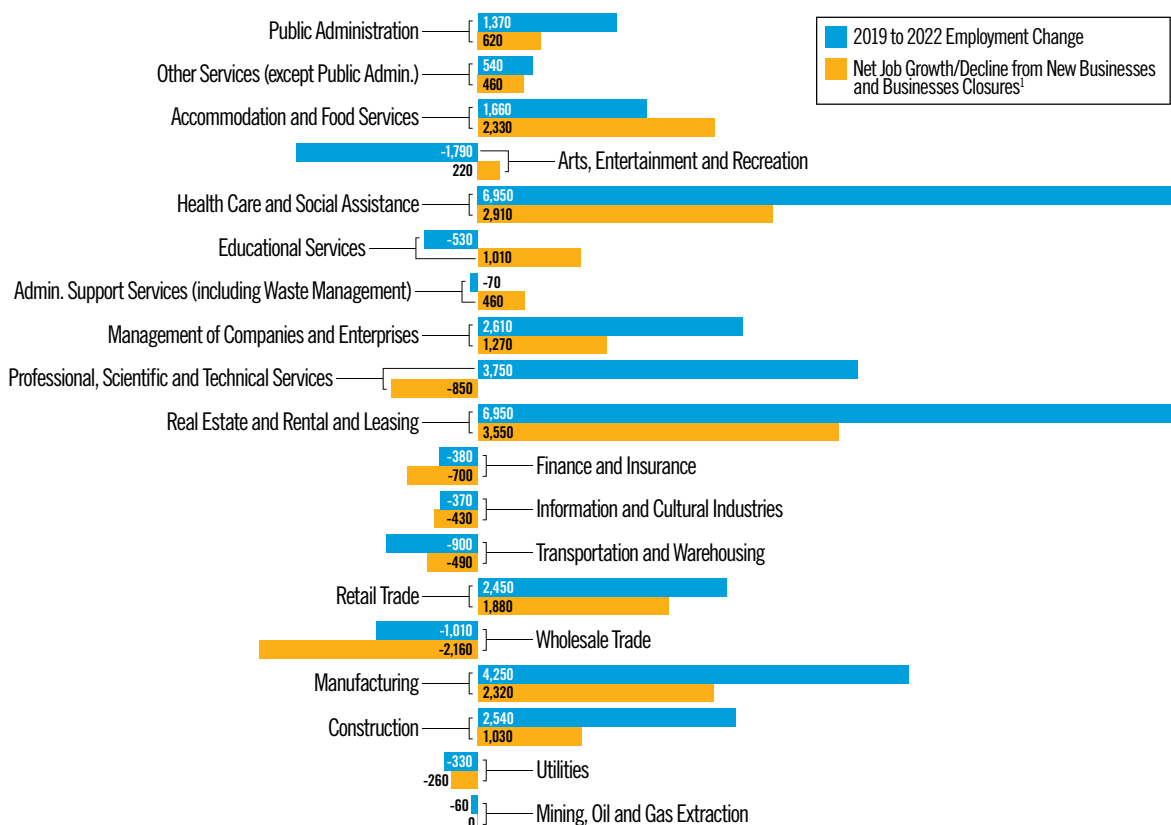
YORK REGION EMPLOYMENT

NET JOB GROWTH and DECLINE from NEW SURVEYED BUSINESSES and BUSINESS CLOSURES - 2019 to 2022

Examining how new businesses and business closures in 2022 have contributed to sectoral growth and decline since 2019 is useful to understand factors causing employment change. Although many sectors saw job decline from business closures, businesses that have moved out of York Region, and businesses not found at location in 2019 and 2022, most experienced subsequent growth indicating York Region's business community has recovered well from the impacts of the COVID-19 pandemic.

Figure 13 highlights the change in employment within each sector since 2019 and the amount that can be attributed to net job growth or decline from new businesses and business closures. The remaining job growth or decline shown in the chart is the result of businesses that were existing in 2019 expanding their operations to employ more people or downsizing operations to employ less people.

FIGURE 13: Employment Change by Sector vs. Job Growth/Decline from New Surveyed Businesses and Business Closures¹, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022. **Note:** ¹ Includes business closures, businesses not found at location in 2019 and 2022, and businesses that have moved out of York Region.

YORK REGION EMPLOYMENT

Table 5 provides further explanation how Figure 15 is to be interpreted detailing change within each sector between 2019 and 2022, and the factors attributed to decline and growth.

TABLE 5: Reasons for Employment Change by Sector, 2019 to 2022

SECTOR	Employment Change	Net Job Growth from New and Closed Businesses ¹	Existing Business Expansion/Downsizing ²
Public Administration	1,370	620	740
Other Services (except Public Admin.)	540	460	90
Accommodation and Food Services	1,160	2,330	-670
Arts, Entertainment and Recreation	-1,790	220	-2,010
Health Care and Social Assistance	6,950	2,910	4,040
Educational Services	-530	1,010	-1,540
Admin. and Support Services (incl. Waste Mgmt.)	-70	460	-530
Management of Companies and Enterprises	2,610	1,270	1,340
Professional, Scientific and Technical Services	3,750	-850	4,600
Real Estate and Rental and Leasing	6,950	3,550	3,390
Finance and Insurance	-380	-700	320
Information and Cultural Industries	-370	-430	60
Transportation and Warehousing	-900	-490	-410
Retail Trade	2,460	1,880	570
Wholesale Trade	-1,010	-2,160	1,150
Manufacturing	4,250	2,320	1,920
Construction	2,540	1,030	1,510
Utilities	-330	-260	-70
Mining and Oil and Gas Extraction	-60	0	-60

Source: York Region Planning and Economic Development Branch, 2022

Notes: ¹Includes business closures, businesses not found at location in 2019 and 2022, and businesses that have moved out of York Region. ²A negative value means the sector recorded more job decline from existing businesses downsizing than job growth from existing businesses expanding operations.

³Due to rounding, figures in this table may not add up to totals provide.

YORK REGION EMPLOYMENT

GOODS-PRODUCING SECTORS - 2019 to 2022 KEY TRENDS

CONSTRUCTION



+2,540 jobs since 2019, representing an average annual **increase of 1.8%**.

41% of employment growth can be attributed to net job growth from new businesses, mainly in the specialty trade contractors (59% of new business employment) sub-sector, however **27% of new employment** was also in the construction of buildings sub-sector.

59% of employment growth can be attributed to employment from the expansion of existing businesses.

Strong job growth evident in the construction sector following an estimated **11% employment decline** in 2020 from the COVID-19 pandemic, according to the Conference Board of Canada. The construction sector is expected to continue to increase with population growth, however with higher interest rates, cost of living increases and a drop in savings the growth in this sector may slow in the short term.

MANUFACTURING



+4,250 jobs since 2019, representing an average annual **increase of 1.7%**.

55% of employment growth can be attributed to net job growth from new businesses, mainly in the transportation equipment manufacturing and food manufacturing sub-sectors.

45% of employment growth can be attributed to employment from the expansion of existing businesses.

Strong job growth evident following an estimated **3.6% employment decline** in 2020 from the COVID-19 pandemic, based on the Conference Board of Canada data for the Region.

SERVICES-PRODUCING SECTORS - 2019 to 2022 KEY TRENDS

HEALTH CARE and SOCIAL ASSISTANCE



+6,950 jobs since 2019, representing an average annual **increase of 5.2%**.

42% of employment growth can be attributed to net job growth from new businesses, largely due to the 2021 opening of the Cortellucci Vaughan Hospital.

58% of employment growth can be attributed to employment from the expansion of existing businesses mainly of existing hospitals and home health care services.

The health care sector is expected to continue to grow as the Region continues to grapple with the COVID-19 pandemic. The Region's aging population will also play a factor, which will increase demand for access to health care, and innovation and new technology in the industry will also drive growth.

SERVICES-PRODUCING SECTORS - 2019 to 2022 KEY TRENDS (continued)

REAL ESTATE and RENTAL and LEASING



+6,950 jobs since 2019, representing an average annual **increase of 10.3%**.

51% of employment growth can be attributed to net job growth from new businesses.

49% of employment growth can be attributed to employment from the expansion of existing real estate businesses.

With the transition to work from home during the COVID-19 pandemic, there was demand for housing in suburban areas as people moved away from city living to upsize homes with more space. This accompanied with low mortgage and interest rates, and accumulated savings during the COVID-19 pandemic, created a hot real estate market which drove job growth in this sector.

With rising mortgage rates in 2022, higher cost of living, a slowing housing market, lower accumulated savings and economic uncertainty, the real estate sector is not expected to experience the significant growth it recorded between 2019 and 2022 in the short term. This sector will, however, continue to see growth in demand for rental and leasing options.

PROFESSIONAL, SCIENTIFIC and TECHNICAL SERVICES



+3,750 jobs since 2019, representing an average annual **increase of 2.2%**.

The growth recorded in this sector was driven exclusively by the expansion of existing businesses, since it saw a **net job decline of 23%** from new businesses and business closures.

The management consulting services sub-sector recorded the most job growth between 2019 and 2022.

The ability of this sector to adapt their operation to remote work limited employment decline from the COVID-19 pandemic and many were able to expand business operations and employ more people.

ACCOMMODATION and FOOD SERVICES



+1,660 jobs since 2019, representing an average annual **increase of 1.5%**.

Most employment growth in this sector can be attributed to net job growth from new business establishments as existing businesses saw a **net job decline of 40%**.

This indicates many accommodation and food services establishments have either downsized since 2019 or have been unable to fill positions.

The Conference Board of Canada estimated a **30% decline** in this sector from 2019 to 2020, which was the sector hardest hit globally and in the Region because of the COVID-19 pandemic.

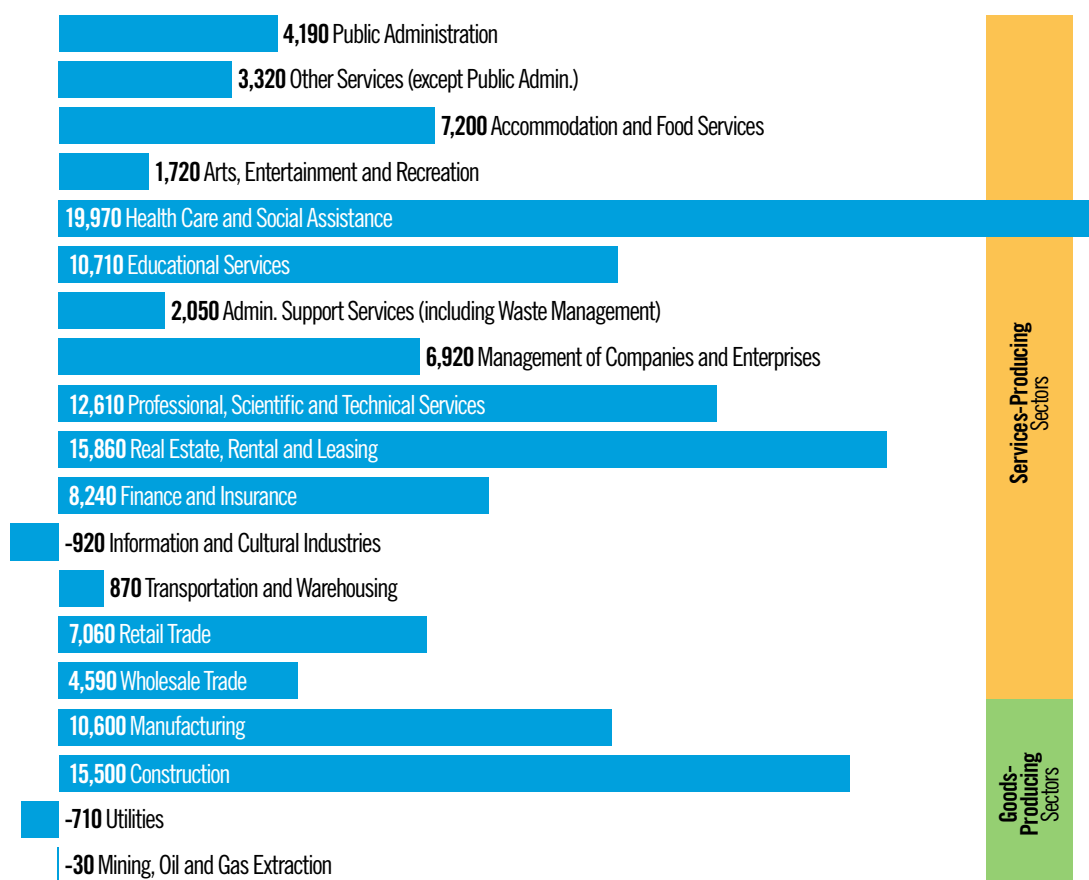
Strong recovery since the start of the COVID-19 pandemic is evident with growth of **6,490 jobs** from new accommodation and food services business establishments in the Region.

YORK REGION EMPLOYMENT

10-YEAR SECTOR TRENDS - 2012 to 2022

Over the last 10-years the manufacturing, retail trade, and professional, scientific and technical services sectors have accounted for the largest share of surveyed employment in York Region (Figure 14). Shares in employment have seen gradual fluctuations with continued growth in sectors including health care and social assistance, real estate and rental and leasing, and construction. Emerging new technologies and corresponding changes to the nature of employment will continue to shape the Region's economy in years to come. Since 2012, York Region has added approximately **129,720 jobs** growing at an annual rate of **2.7%**, excluding farm-based businesses, which according to the Census of Agriculture have **declined from 2,936 jobs** in 2011 to **2,515 jobs** in 2021.

FIGURE 14: Employment Change by Sector, 2012 to 2022



Source: York Region Planning and Economic Development Branch, 2022

Growth in key knowledge-based sectors including health care and social assistance, professional, scientific and technical services, and educational services have collectively combined for about **33% of all employment growth** in the Region since 2012. These industries continue to be a driving force for the York Region economy and show the Region's shifting employment landscape towards knowledge-based jobs.

KEY GOODS-PRODUCING SECTORS – 10-YEAR KEY TRENDS

CONSTRUCTION



The construction sector has added **15,510 jobs since 2012** and is growing at an **average annual rate of 4.7%** or about **1,550 jobs**. The construction sector is York Region's fastest growing goods-producing sector. Growth in the construction sector in the GTA is closely tied to local population and business growth by investing in water and wastewater infrastructure and in critical transportation infrastructure including the VIVA Rapidways in and around the Region's Centres and Corridors, and Subway extensions from Toronto.

Similarly, Canada, Ontario and the GTA all recorded significant employment growth in the construction sector over the past 5 years, and growth is expected to continue, however it may slow in the short term due to higher interest rates, cost of living increases, and a drop in savings from residents.

MANUFACTURING



The manufacturing sector has **added 10,600 jobs** since 2012 growing at an **average annual rate of 1.2%** or about **1,060 jobs**. Manufacturing continues to hold the **largest share of employment** in the Region at **14%**. Sub-sectors including plastics and rubber products manufacturing and transportation equipment manufacturing contributed the most to ten-year job growth, while petroleum and coal product manufacturing experienced a modest decline.

TOP MANUFACTURING SUB-SECTORS:

Transportation and equipment manufacturing – **14,100 jobs** (16%)

Fabricated metal product manufacturing – **9,500 jobs** (11%)

Plastics and rubber products manufacturing – **8,860 jobs** (10%)

AGRICULTURE



Based on the Census of Agriculture, as of 2021, York Region is home to **over 600 farm-based businesses** and **270 food and beverage manufacturers and distributors** that contribute to the Region's economic vitality. Since 2016, the number of farms active in the Region has **decreased 15%** (about 110 farms), and the Region has seen a **6% decrease** (8,170 acres) in farmland.

The agri-food sector in York Region includes everything from farms to processors, food retailers and restaurants, and provides approximately **57,000 jobs** generating **\$2.7 billion in GDP** for the Region. Based on the 2021 Census of Agriculture, gross farm sales (a measure of farm business income) for primary food production in the Region, grew to **approximately \$390 million**, representing a **30% or \$89 million** increase from 2016. The primary agricultural sector in York Region provides **2,515 jobs** (direct, indirect, and induced). This represents a **decrease of 17%** (740 jobs) since 2016.

The food and beverage manufacturing sub-sector accounts for **9%** of all businesses and employment in the Region's manufacturing sector. This sub-sector has **increased employment 60%** since 2012, adding about **2,980 jobs**. Subsequently, the food and beverage manufacturing sub-sector has also seen a **50% increase** in the number of businesses, adding **84 businesses**. As reported in the 2019 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 sub-sector for the Region and supports many other sectors in the Region including retail trade, and accommodation and food services.

KEY SERVICES-PRODUCING SECTORS - 10-YEAR KEY TRENDS

RETAIL TRADE



The retail trade sector represents the largest share of employment of services-producing sectors and represents **11%** (67,020 jobs) of the Region's total employment. Since 2012, the retail trade sector has grown at an annual rate of **1.1%** or about **710 jobs**.

E-commerce continues to disrupt and transform the traditional retail sector model. The growth in the retail trade sector has been softening since 2009, with consumer consumption shifting from retail outlets to online sales. Trends in increasing online shopping experiences have elevated even more since the start of the COVID-19 pandemic. As online shopping continues to grow, growth in new sectors such as logistics and warehousing will increase. Recent examples include the 2020 opening of a new Sobeys Inc. e-commerce facility and 2021 opening of an Amazon fulfillment centre, both in the City of Vaughan.

REAL ESTATE and RENTAL and LEASING



The real estate and rental and leasing sector is one of the fastest growing sectors in York Region growing at an average annual rate of **7.1%** or **1,590 jobs** since 2012.

Since 2012, this sector **added 15,860 jobs**. The housing industry has tightened its grip on the Canadian economy. Canada, Ontario and York Region have experienced a housing price boom over the last 10 years, which has been attracting more people to the real estate industry. Although housing inventory on the market, and affordability have declined due to rising housing costs and mortgage rates, employment in the real estate sector continues to see growth.

HEALTH CARE and SOCIAL ASSISTANCE



The health care and social assistance sector is the fastest growing sector in York Region growing at an average annual rate of **4.5%** or about **2,000 jobs** since 2012. Since 2012, the health care and social assistance sector added a Region high **19,960 jobs**. The COVID-19 pandemic elevated the need for more employment in the health care industry. The opening of the Cortellucci Vaughan Hospital in 2021 has added over 1,500 jobs to this sector alone. Growth in this sector is expected to continue as the world continues to grapple with the COVID-19 pandemic and with the aging population requiring an increased access to healthcare, innovations and technology in the industry.

PROFESSIONAL, SCIENTIFIC and TECHNICAL SERVICES



Since 2012, the professional, scientific and technical services sector has added **12,610 jobs**.

Accounting for almost **10%** (60,790 jobs) of the Region's total jobs, this sector is growing at an average annual rate of **2.2%** or about **1,260 jobs** since 2012. This sector includes sub-sectors such as information technology, legal services, accounting, engineering and technical services, architectural and interior design services, management consulting and research and development.

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

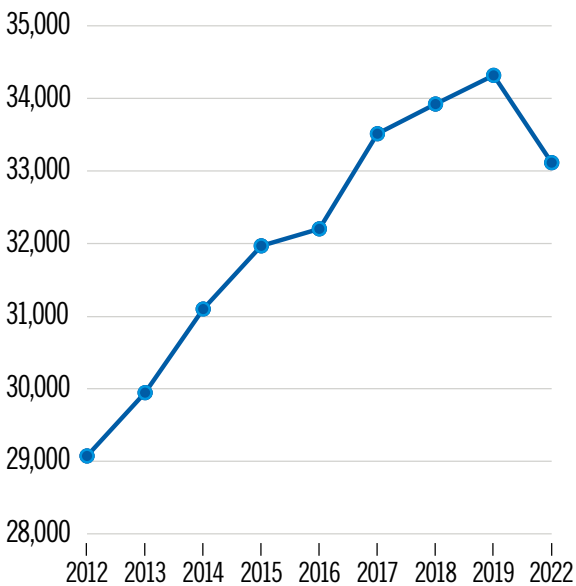
YORK REGION BUSINESSES

33,110 BUSINESSES with a physical location SURVEYED in 2022

York Region surveyed **over 33,110 businesses** in 2022 with a physical location, an **increase of 4,000 businesses** from the 2012 survey, however a **decline of 1,200 business establishments** from the 2019 survey (Figure 15).

According to Statistic Canada Business Counts (CBC) database, York Region is home to over **55,600** business establishments, including home-based and household employers.

FIGURE 15: York Region Surveyed Businesses, 2012 to 2022



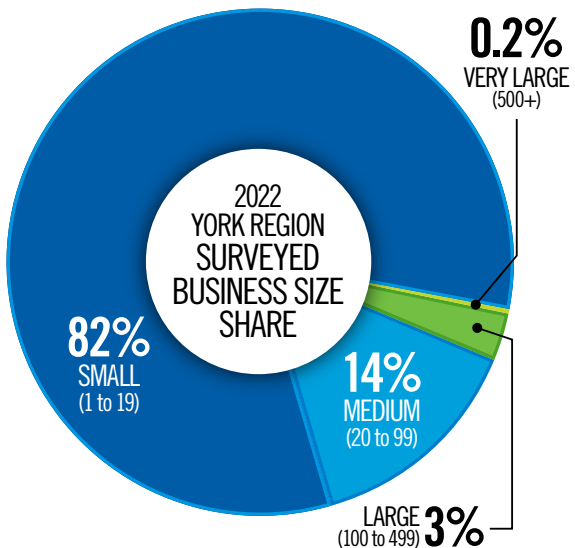
Source: York Region Planning and Economic Development Branch, 2022

BUSINESS SIZE

York Region's business community continues to be dominated by small businesses (1-19 employees), accounting for **82%** (27,260 businesses) of surveyed businesses in 2022 (Figure 16). The share of small businesses is indicative of the important role they play in York Region's economy, accounting **26%** (156,500 jobs) of York Region's surveyed employment in 2022.

While the share of very large businesses (500+ employees) is relatively small at **0.2%** of the Region's surveyed establishments, it has **grown by 30%** since 2019 (from 63 to 82 businesses) and provides jobs for almost **90,000 employees** (15% of total jobs). The rise in very large businesses demonstrates the Region's continued ability to attract large employers.

FIGURE 17: York Region Surveyed Business Size Share, 2022



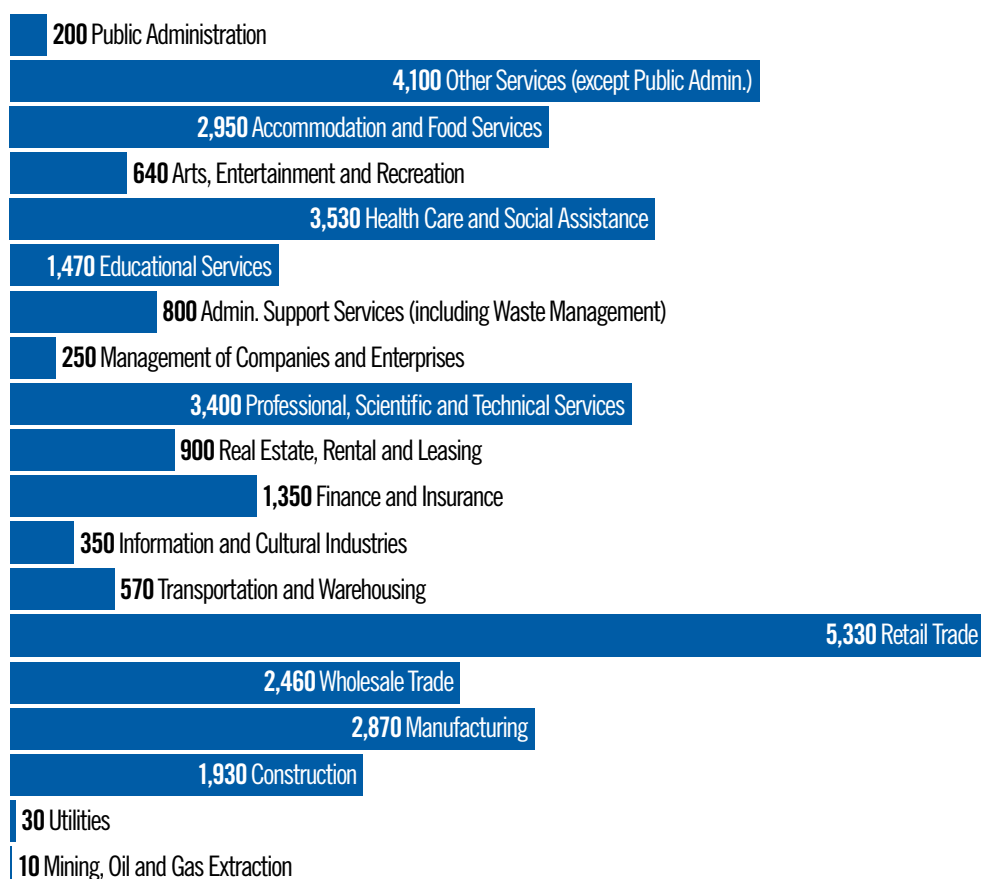
Source: York Region Planning and Economic Development Branch, 2022

YORK REGION BUSINESSES

BUSINESSES by SECTOR

York Region's business community includes a variety of different sectors (Figure 17). The retail trade sector has the highest share of surveyed businesses in the Region at **16%** (5,330 businesses).

FIGURE 17: Share of York Region Surveyed Businesses, 2022



Source: York Region Planning and Economic Development Branch, 2022

Map 2 displays the spatial distribution of businesses across York Region.

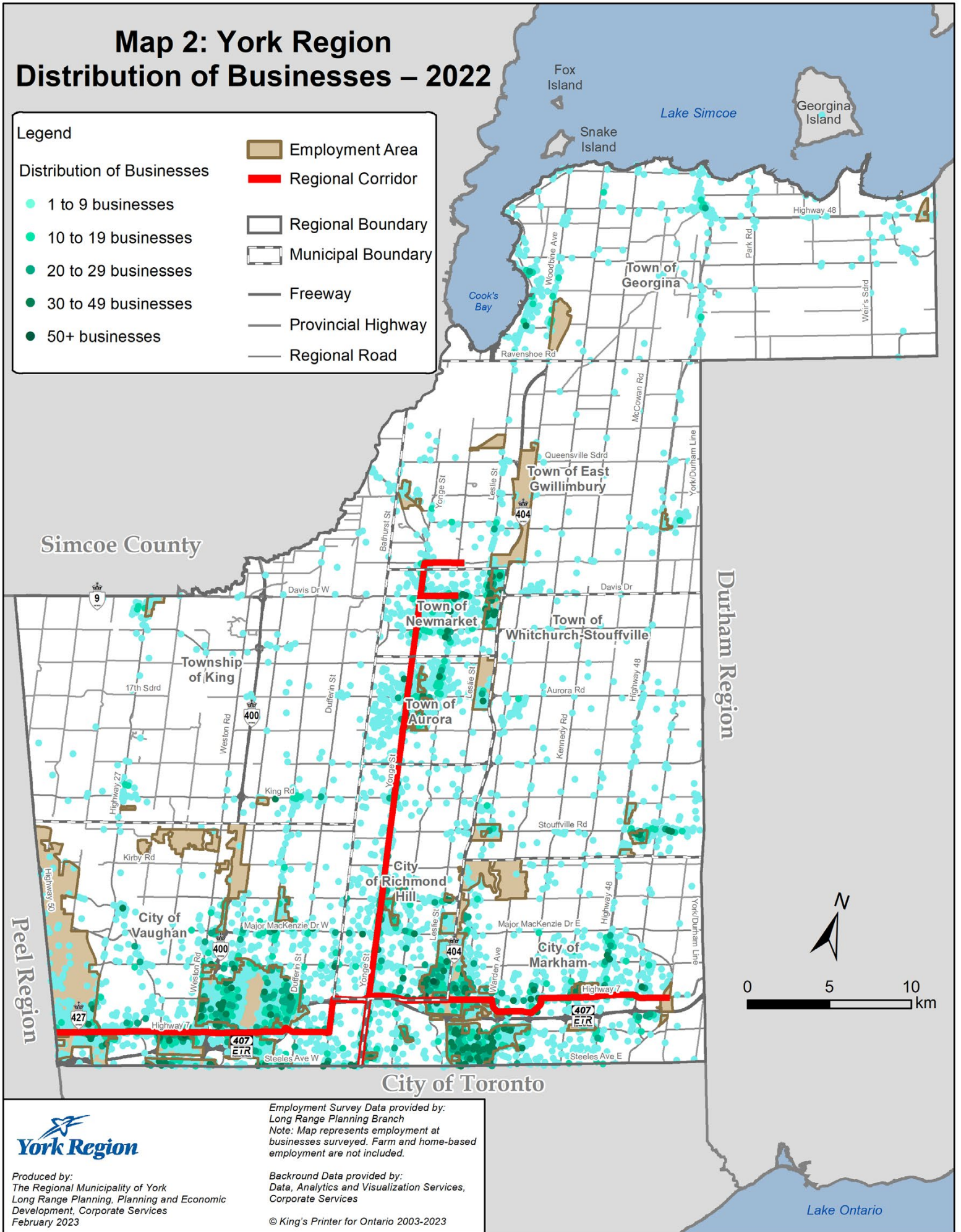
Map 2: York Region Distribution of Businesses – 2022

Legend

Distribution of Businesses

- 1 to 9 businesses
- 10 to 19 businesses
- 20 to 29 businesses
- 30 to 49 businesses
- 50+ businesses

- Employment Area
- Regional Corridor
- Regional Boundary
- Municipal Boundary
- Freeway
- Provincial Highway
- Regional Road



Produced by:
The Regional Municipality of York
Long Range Planning, Planning and Economic
Development, Corporate Services
February 2023

Employment Survey Data provided by:
Long Range Planning Branch
Note: Map represents employment at
businesses surveyed. Farm and home-based
employment are not included.

Background Data provided by:
Data, Analytics and Visualization Services,
Corporate Services

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Lake Ontario

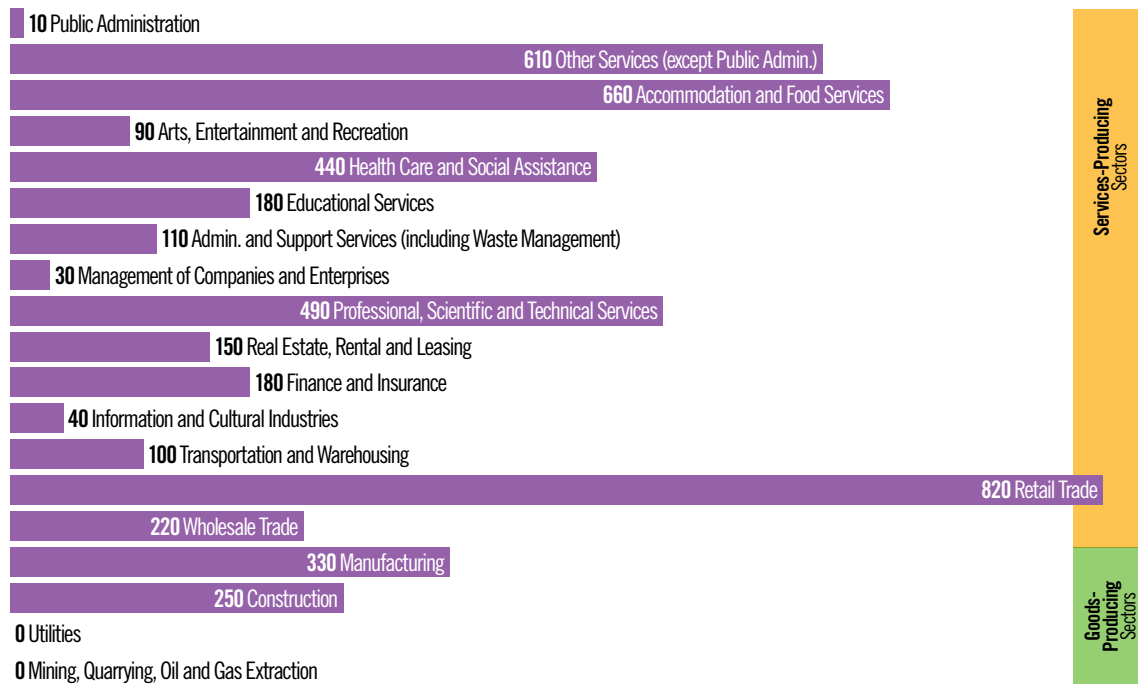
YORK REGION BUSINESSES



4,710 NEW SURVEYED BUSINESSES between 2019 to 2022

NEW SURVEYED BUSINESSES 2019 to 2022

FIGURE 18: New Surveyed Businesses by Sector, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022

NEW SURVEYED BUSINESSES 2019 to 2022

TOP 5 SECTORS

- Retail Trade** 17% +820 Businesses
- Accommodation and Food Services** 14% +660 Businesses
- Other Services (except Public Admin.)** 13% +610 Businesses
- Professional, Scientific and Technical Services** 10% +490 Businesses
- Health Care and Social Assistance** 9% +440 Businesses

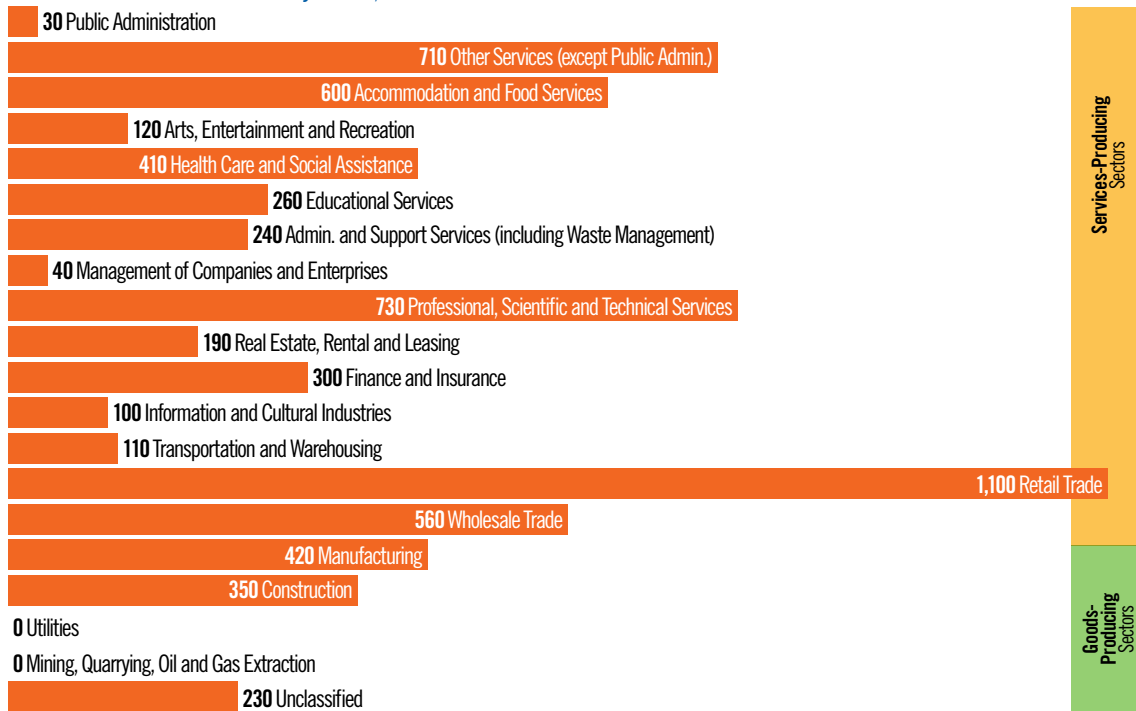
Source: York Region Planning and Economic Development Branch, 2022

YORK REGION BUSINESSES

6,490 BUSINESS CLOSURES¹
between 2019 to 2022

BUSINESS CLOSURES 2019 to 2022

FIGURE 19: Business Closures by Sector, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022

BUSINESS CLOSURES 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022

Note: ¹ Includes business closures (3,490 businesses), businesses not found at location in 2019 and 2022 (2,160 businesses), and businesses that have moved out of York Region (850 businesses).

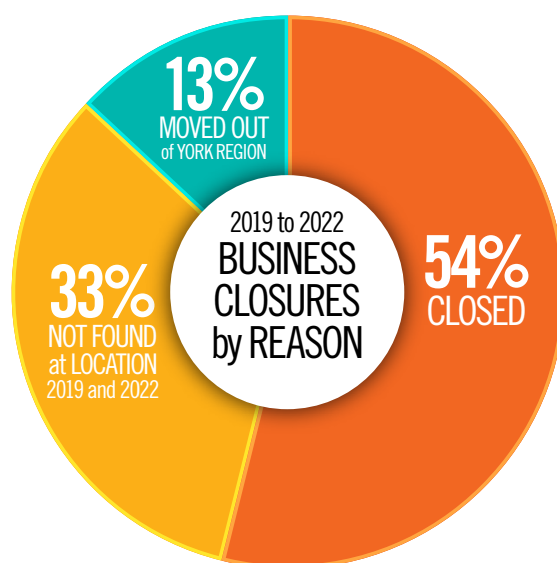
YORK REGION BUSINESSES

CATEGORIZING BUSINESS CLOSURES

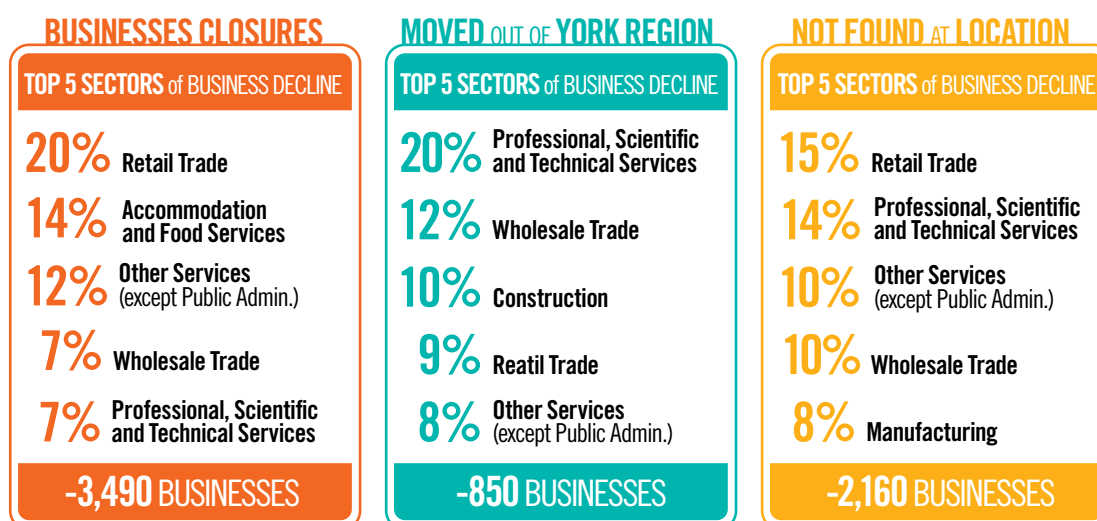
There are three different categories explaining what falls under business closures between 2019 and 2022.

- 1. Business Closures:** businesses that have closed between 2019 and 2022
- 2. Moved out of York Region:** businesses that have relocated to a new location outside of York Region
- 3. Not Found at Location (NFAL) in 2019 and 2022:** businesses that were identified as not found at location while surveying in 2019 and 2022. Staff undertook a comprehensive review of businesses identified as not found at location in two consecutive surveys (2019 and 2022). If surveyors were unable to locate them again or identify them online in 2022, they were deemed closed.

FIGURE 20: NUMBER of BUSINESS CLOSURES by REASON, 2019 to 2022



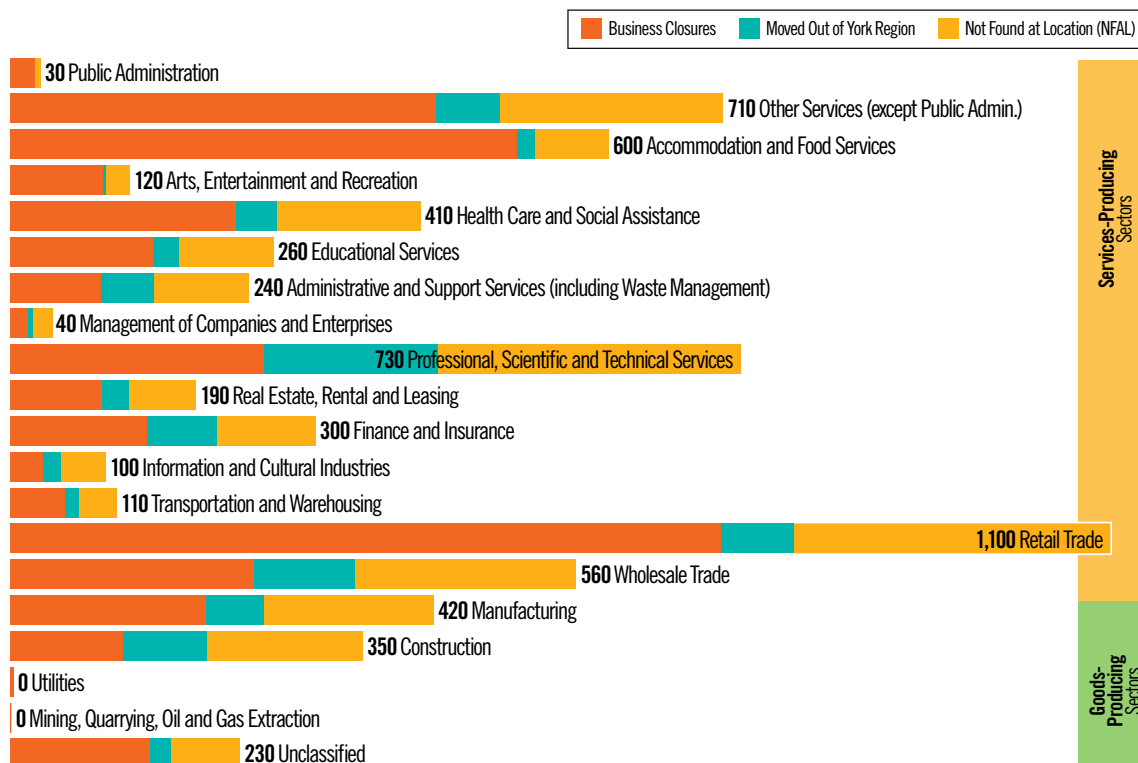
Source: York Region Planning and Economic Development Branch, 2022



YORK REGION BUSINESSES

Figure 21 shows the business decline from business closures, businesses that have moved out of York Region, and businesses that were Not Found at Location (NFAL) in 2019 and 2022 in each sector.

FIGURE 21: Number of Business Closures by Sector, 2019 to 2022



Source: York Region Planning and Economic Development Branch, 2022

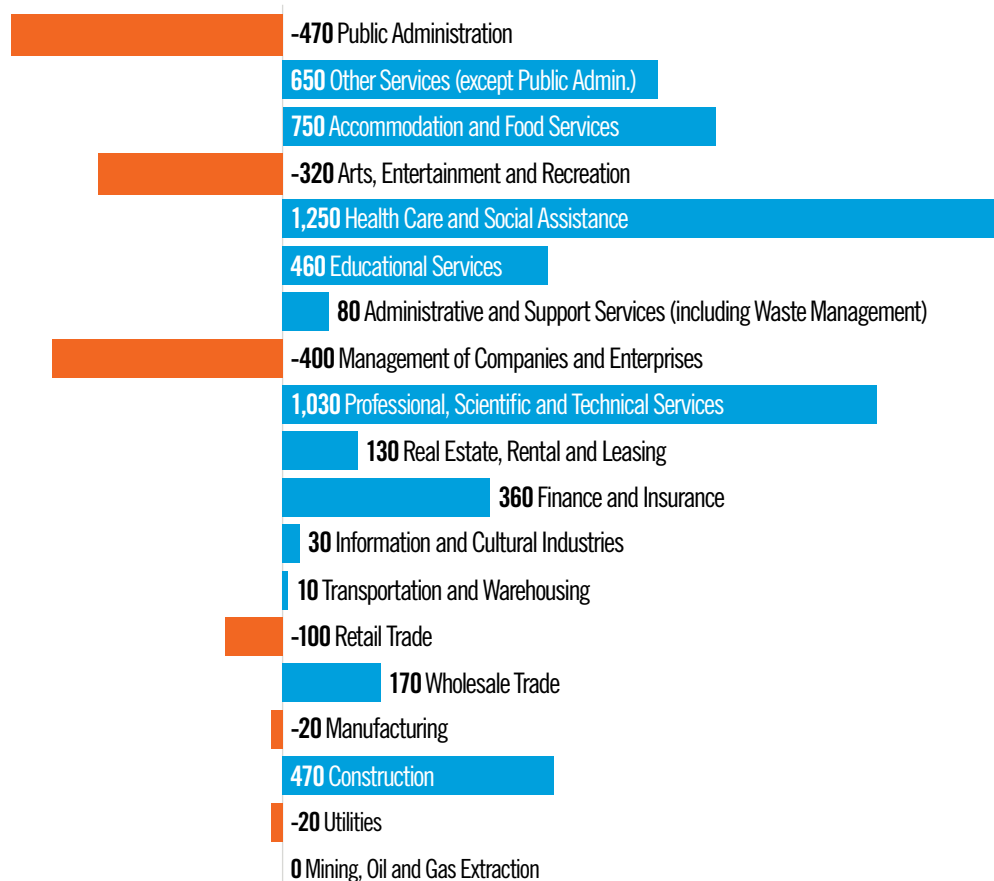


YORK REGION BUSINESSES

10-YEAR SECTOR TRENDS

York Region continues to be an attractive destination for businesses to reside and grow. Since 2012, the number of York Region business establishments has grown approximately **14%** (4,040 businesses) and are increasing at an **average annual rate of 1.4%**. Over the last 10 years, key knowledge-based sectors including health care and social assistance and professional, scientific and technical services have experienced the largest business growth in the Region (Figure 22).

FIGURE 22: York Region Business Growth and Decline, 2012 to 2022



Source: York Region Planning and Economic Development Branch, 2022

Sectors including public administration, arts, entertainment and recreation, and management of companies and enterprises have recorded the largest decline in business establishments since 2012. Many of the declining sectors were impacted by the COVID-19 pandemic and are still slowly recovering from its effects.

FACTORS CONTRIBUTING to ECONOMIC GROWTH



55,600 BUSINESSES
and over **615,000** JOBS

Strategically located in the heart of the Greater Toronto Area (GTA), York Region is home to over 1.2 million residents. According to the Provincial Growth Plan, York Region is expected to grow to over 2 million residents and over 990,000 jobs by 2051. The Region is well positioned to plan for this growth through continued investments in critical infrastructure.

The COVID-19 pandemic had a significant impact on all aspects of the community since 2020. In response, with regard to economic development, Council approved the [Business Support Partnership](#) in April 2020. Under this umbrella, several initiatives were launched including moving business advisory support services online, helping with tourism relief, Council approval of \$500,000 supporting nearly 100 small businesses, and facilitating on-farm COVID-19 testing of temporary foreign workers in collaboration with Public Health. These initiatives allowed the Region to help businesses as they navigated through the difficult times brought on by the pandemic.

The Federal and Provincial governments also delivered significant financial support programs to businesses impacted during, or as a result of, the COVID-19 pandemic closures. The key programs ended as restrictions were gradually lifted and business needs shifted from emergency support to recovery. Examples of some key COVID-19 pandemic programs available to businesses of all sizes, and in various sectors included the Canada Emergency Wage Subsidy, Canada Emergency Business Account, Canada Emergency Rent Subsidy, Canada Emergency Response Benefit, Tourism and Hospitality Recovery Program, and Hardest-Hit Business Recovery Program.

York Region continues to be a top destination in the GTA and Canada for workforce talent and businesses, serving as one of the largest business hubs in the GTA. The presence of the CP intermodal facility and CN MacMillan rail yard, a strong network of 400-series highways and its proximity to Toronto Pearson International Airport facilitates easy connections to global markets and enables the seamless movement of people, goods and services. York Region is the only GTA jurisdiction outside the City of Toronto with subway connections and this continues to add to the attractiveness of the Region as a place for the labour force and businesses to reside and grow. These factors contributed to the 2020 opening of a 250,000 square foot Sobeys Inc. e-commerce facility as well as the 2021 opening of a new Amazon fulfillment centre, both located in the City of Vaughan.

The Region continues to support business and job growth through major transit investments, particularly in its four provincially designated urban growth centres and the connecting corridors. Toronto's TTC subway extension to the City of Vaughan has been a catalyst in supporting and creating desirable business locations in the Region. The transit network is being further enhanced with the development of a second subway extension line to York Region connecting Richmond Hill and Markham to downtown Toronto. This transit infrastructure project will be key in supporting local economic growth in York Region and will be a driving force to achieving the Province's 2051 population and employment forecast for the Region. As the Region's urban structure continues to evolve, York Region will continue to be a top business location in the GTA.

FACTORS CONTRIBUTING to ECONOMIC GROWTH

York Region's economy, local businesses and employment growth are closely tied to 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.

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 which need to be addressed given their role 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.

Economic uncertainty from the COVID-19 pandemic slowed economic growth in the Region. Although steady job growth and healthy employment is evident in the Region, economic uncertainty will persist over the coming year as businesses and employees face new challenges including supply chain issues, hiring issues, political instability, global economic issues (i.e., war in Ukraine, possible recession), inflation, high interest rates, cost of living increases, and housing challenges.

CONCLUSIONS

In mid-year 2022, there were an estimated 615,760 jobs in the Region, excluding jobs from home based businesses. York Region is one of Canada's fastest-growing large urban municipalities and is anticipated 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, and to investing in 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 resilience, vitality, and livability. 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.

The COVID-19 pandemic had a significant impact on York Region businesses and employment. The Conference Board of Canada estimates York Region employment declined 4.1% from 2019 to 2020 because of the COVID-19 pandemic, before recovering 6% in 2021. Although many sectors have seen a significant amount of business closures and employment lost to closures, many have also seen an influx of new business establishments and corresponding employment. The Region's strong job growth in key services-producing sectors indicates the Region has recovered strongly since the start of the COVID-19 pandemic. As the Region continues to invest in major transit infrastructure projects and centre economic growth around major transit station areas and the Region's four provincially designated Urban Growth Centres, employment is anticipated to continue to grow. Over the next year, economic uncertainty will likely impact the rate of this employment growth as businesses and employees face new challenges including supply chain issues, hiring issues, political instability, global economic issues (ie., war in Ukraine, possible recession), inflation, high interest rates, cost of living increases, and housing challenges. As these challenges impact the Region and broader Canadian landscape, the Region will continue to closely monitor these trends.

APPENDIX A: METHODOLOGY and DATA SOURCES

BACKGROUND

The 2022 employment survey was a comprehensive Region-wide survey of all businesses with a physical location (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 has completed Region-wide surveys of all businesses with a physical location between 2007 to 2019 and 2022. A Region-wide employment survey was not conducted in 2020 or 2021 due to the COVID-19 pandemic. The next employment survey will be conducted in 2024.

DATA COLLECTION

Data collection for the 2022 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 surveyors were unable to contact in person); and
- Electronically through e-mail messages, online entries via the Region's corporate website and facsimile submissions

Businesses were contacted primarily through door-to-door interviews between May and August of 2022 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 possible 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.

In 2022, the Region was able to survey 33,110 businesses with a physical location. Approximately 64% of surveyed businesses were successfully contacted. This compares to an average of 81% successfully contacted businesses from 2014 to 2019.

EMPLOYMENT ESTIMATE for BUSINESSES 'UNABLE to CONTACT'

The Region's survey team was unable to successfully contact 36% (12,070 businesses) of businesses in the employment survey database. These businesses were marked as 'Unable to Contact' (UTC). Using trends observed in corresponding NAIC codes from successfully surveyed businesses, staff estimated employment for these businesses. Below is a detailed outline of the methodology used to derive these employment estimates.

BUSINESSES NOT FOUND at LOCATION (NFAL) in 2022

- 870 businesses (7% of UTC's) were also identified as not found at location (NFAL), meaning the surveyor could not physically find the business while surveying out in the field
- These businesses were individually investigated (i.e., using online research, callbacks) to determine if they are still active in the Region; however, they were categorized as NFAL since staff were unable to determine if the business has closed, relocated, or was conducting operations remotely
- Each business was assigned an employment estimate of 1 job
- NFAL businesses will be closed as part of the next employment survey (scheduled for 2024) if the status of the business remains the same

APPENDIX A: METHODOLOGY and DATA SOURCES

BUSINESSES UNABLE to CONTACT (UTC) in 2022

- Surveyors were unable to contact 11,210 businesses with a known physical location while surveying in 2022, meaning surveyors were unable to successfully survey these businesses at their physical location and by phone and email. These include businesses surveyed in 2019 and new businesses found in 2022
- Each business was also investigated online to determine business activity and confirm if active in the Region
- Employment estimates for these businesses were based on trends observed in corresponding NAIC codes from successfully surveyed businesses in 2022

A different method for estimating employment for businesses existing in 2019 was used versus new business found in 2022:

BUSINESSES EXISTING in 2019 WITH MULTIPLE LOCATIONS (i.e., franchises)

1. Each business surveyors were unable to contact in 2022 has an assigned NAIC code based on business activity and employment figure from the 2019 employment survey. The 2019 employment figure falls within a certain employee range¹ used in the survey database
2. All locations successfully surveyed in 2022 that are within the corresponding NAIC code and employee range², were extracted
3. The average number of employees in 2022 for these locations was calculated and applied as the employment estimate for the business

INDEPENDENT BUSINESSES EXISTING in 2019

1. Each independent business surveyors were unable to contact in 2022 has an assigned NAIC code based on business activity and employment figure from the 2019 employment survey
2. The average 2019 employment figure for all businesses that are within the corresponding NAIC code¹ of each independent business was compared to the average 2022 employment figure for all businesses in this NAIC code¹. The 2019 employee figure for each independent business was adjusted upward or downward based on the overall trend observed between 2019 and 2022 for the corresponding NAIC sector
3. For large (100-499 employees) and very large (500+ employees) businesses, if the calculated 2022 estimate was greater than 50 employees compared to the 2019 employment figure, no adjustment was made, and the same 2019 employment figure was used as the 2022 employment estimate

INDEPENDENT BUSINESSES EXISTING in 2019

1. A weighted average (number of businesses by employee range²) was calculated for the new businesses' corresponding NAIC code using employee figures from businesses successfully surveyed in 2022. This weighted average was applied as the employment estimate for these new businesses surveyors were unable to contact

Notes: ¹ For the methods above, 5-digit NAIC code averages were used if the number of businesses successfully surveyed in the corresponding NAIC code was greater than or equal to five. 4-digit NAIC code averages were used if the number of businesses successfully surveyed in the corresponding NAIC sector was less than five. ²The following employee ranges were used: 1-4 employees, 5-9 employees, 10-19 employees, 20-49 employees, 50-99 employees, 100-499 employees, 500+ employees

APPENDIX A: METHODOLOGY and DATA SOURCES

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 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. Data collected was based on responses received from businesses. In certain instances, 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. Additionally, in some instances survey respondents were unable to confirm numbers at the time of the survey, and managers or representatives who would be able to were unavailable.

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 SURVEY of EMPLOYMENT, PAYROLL and HOURS (SEPH)

The Statistics Canada Survey of Employment, Payrolls and Hours (SEPH) provides a monthly portrait of the number of jobs by industry at the national, provincial, and territorial levels. Monthly survey estimates are produced by a combination of a census of payroll deductions, provided by the Canada Revenue Agency, and the Business Payrolls Survey (BPS), which collects data from a sample of 15,000 businesses. The Survey of Employment, Payrolls and Hours collects labour data directly from survey respondents (businesses). The statistics compiled by SEPH are based on a census of administrative records for all in-scope establishments with employees that can be found on the Business Register. 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 (PD7 form) accounts maintained by Canada Revenue Agency.

CONFERENCE BOARD of CANADA

The Conference Board of Canada projects employment in the Region using a medium-term economic forecasting model. The model involves a historical database at the regional level constructed using the Conference Board's methodology based on official data sourced from Statistics Canada and the Canada Mortgage and Housing Corporation. It also involves respective modules to forecast population, GDP by industry, employment by industry and other labour market outcomes, and housing for the Regional Municipality of York census division (CD) and its nine census subdivisions (CSDs).

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.

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).

APPENDIX B: SECTOR DEFINITIONS

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.

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.

APPENDIX B: SECTOR DEFINITIONS

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 childcare, to those requiring such assistance.

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, reupholsters); 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.

2022 YORK REGION
EMPLOYMENT
and **INDUSTRY** REPORT

For more information on businesses
in York Region please contact:
York Region Planning and Economic Development Branch
1-877-464-9675 Extension 71508 or visit
york.ca/employmentsurvey

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