

The Regional Municipality of York

Committee of the Whole
Planning and Economic Development
September 19, 2019

Report of the Commissioner of Corporate Services and Chief Planner

York Region Employment Survey Data Collection Frequency

1. Recommendation

Council receive this report for information.

2. Summary

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.

This report informs Council that the Employment Survey is proposed to be conducted every two years going forward.

Key Points:

- 19 years of annual data collection has established a sufficient database for monitoring trends.
- Collecting survey data every two years will meet Regional and partner needs.
- Since 1998 the number of businesses surveyed in the Region has grown by 67% (from 20,400 to 34,100) resulting in increased resourcing intensity.
- 2019 data has been collected and results will be reported to Council in Q1 2020.
- Based on a 2-year frequency, the next full employment survey collection will occur in 2021 and results reported to Council in Q1 2022.

3. Background

York Region's Employment Survey data is an important input to Regional programs, such as the Municipal Comprehensive Review

York Region has been conducting an Employment Survey since 1998, annually since 2001, resulting in 19 consecutive years of employment, business and industry information. The Region's survey is one of the longest running employment surveys amongst the Greater Toronto and Hamilton area (GTHA) regions, second only to the City of Toronto's survey.

York Region's survey is a robust dataset that collects information on business location, activity, employment, business longevity and industry classification used to create the [Employment and Industry Report](#). Businesses surveyed are those that have a physical location in the Region and exclude home-based and farm-based businesses. Survey data is used as an input for a range of Regional projects including the Municipal Comprehensive Review (MCR), Development Charges by-law and transportation and water and wastewater infrastructure plans. It is used by other municipal departments, local municipalities, non-profit organizations and private sector groups.

Regional departments have indicated that data collection every two years would not negatively impact infrastructure plan updates or service and program delivery.

The survey involves considerable staff resources and time to administer

The survey is a large project that involves considerable resources and time to administer including hiring, training and supervising students, updating the survey application, undertaking communication and marketing, managing day to day operations, performing data quality tasks leading to data delivery and publishing the final report. The Planning and Economic Development Branch is increasingly challenged to balance the value of an annual employment survey project against other core business needs including the MCR and ongoing population forecasting work.

Modifying data collection to every two years will continue to meet the needs of the corporation and external users and make better use of staff resources, recognizing that in the future the project may need to expand the student complement to keep pace with the number of growing businesses in the Region.

Rapid business and employment growth in York Region over the last decade has increased employment survey workload and complexity

York Region is one of GTHA's fastest growing municipalities. Surveyed businesses now total over 34,000 compared to 26,700 a decade ago, an increase of 27% and are forecast to reach 37,000 by 2022. To maintain and improve survey data integrity and quality, the employment survey has undergone enhancements since 2014. Some of the improvements included implementing a new quality control process to increase the level of confidence in the dataset and adding two Quality Assurance students during the survey months dedicated

to reviewing data for anomalies. Continuous improvement initiatives are necessary to provide the best possible data to inform Regional and partner programs and services, and monitor economic growth. Non-collection years will provide time to examine innovative methods to streamline the survey and make further improvements.

4. Analysis

Conducting the employment survey every two years will continue to provide valuable data

An employment survey every two years will continue to provide key insights into employment and economic trends within the Region. Nineteen years of annual data provides a solid foundation to draw five and ten year business and employment growth trends for reporting and supports monitoring the Regional Official Plan (ROP).

With almost two decades of annual data available to provide information and insights on employment and industry trends in York Region, modifying the data collection schedule to every other year is prudent and will not negatively impact the ability to use the data for informed decision-making. Collecting data every two years will continue to provide the Region with quality data and allow for program improvements while reducing Regional staffing pressures and potentially alleviate local municipal and Regional budget constraints.

Local municipalities and internal stakeholders were consulted on the two year employment survey approach

Staff consulted with stakeholders regarding the proposed two year collection cycle to determine if any business functions would be impacted. Internal partners were supportive of the approach to collect survey data every two years. Collecting data every other year would be consistent with how other regular Regional surveys are conducted, for instance the Transportation Tomorrow Survey (TTS) that informs the Transportation Master Plan.

As partners on the survey project, local municipalities contribute to the survey budget and provide valuable insights on employment and businesses within their municipalities. During the annual meeting with the nine local municipal partners, held in November 2018, the Region tabled the every two-year data collection approach for discussion. As a follow up, an email was circulated to the local municipal Planning Commissioners and Directors for further comments. Responses were split, with four municipalities agreeable to a two-year collection cycle, four expressing some concerns with a change in data collection frequency and one municipality that was neutral.

Comments received indicated that the resulting survey data provides good value relative to municipal funding contributions and data collected is an important input to local economic development programs and service delivery. Some municipalities expressed concerns regarding out of date data in non-collection years that could be challenging to use for local program planning, employer outreach, investor information and funding and grant

applications. Many of the municipalities requested that data collection align with the Census collection years.

Some municipalities expressed support suggesting a survey every two years could alleviate budgetary pressures and provide opportunities for investments in other projects at the local level.

Data products including the Business Directory and Employment and Industry report will continue every two years

Planning and Economic Development staff will continue to prepare the data products associated with the employment survey every two years. The Employment and Industry report would be on a two year basis and the local and regional business directories will be maintained and updated every two years to coincide with the updated data received. Survey data is also available through the Region's open data site.

A survey every two years provides additional opportunity for process improvement

A survey every two years allows for increased flexibility in the non-collection years to evaluate the program, implement further improvements in data quality and examine opportunities for streamlining the program to maintain our position as a leading municipality in this capacity. Adopting the proposed two year approach for administration of the employment survey would reduce staff pressures and allow increased effort on other core planning functions.

Collecting survey data every two years will align with broader GTHA employment survey reporting

York Region is an active participant of the Regional Information Systems Working Group (RISWG). Under the direction of the Regional Planning Commissioners of Ontario (RPCO), RISWG has formed an Employment Survey subgroup to respond to the growing need of collectively reporting on the GTHA's employment surveys results. The subgroup is made up of other member municipalities that conduct employment surveys, some of which conduct surveys every two years. York Region continues to be a leader in this capacity and provides guidance to other municipalities conducting surveys. Moving to an every two year survey approach staff will continue to align with our RISWG partners for future joint reports of employment survey data as well as the Census collection year as appropriate.

York Region Employment Survey supports the Economic Vitality section of the 2019-2023 Strategic Plan and the Regional Official Plan

The Employment Survey is listed as a key activity within the 'Increase Economic Prosperity' priority area in the 2019-2023 Strategic Plan. Data collected is used to support monitoring of employment targets in the Regional Official Plan. Reporting on detailed employment and sectorial analysis enables informed decisions and implementation of initiatives that enhance

economic vitality and fosters an environment that attracts businesses and grows employment opportunities.

5. Financial

The local municipalities will continue to contribute 40% of the employment survey costs proportionately based on the number of businesses to survey in their municipality. The Region funds the remaining 60% and provides the staff resources necessary to administer the survey, including support from internal departments such as Corporate Communications to prepare messaging and Data Analytics and Visualization Services to assist with technical components.

Table 1 provides a high-level breakdown of approximate costs to operate the survey annually versus every two years. A two-year cycle will require expanding the student complement slightly to keep up with the growing number of surveyed businesses. As a result, while delivery of the survey would go up slightly (from \$310,305 to \$362,140), costs would be spread over two years resulting in a decrease of approximately 40% on an annual basis. As shown in Table 1, equipment costs would remain the same for both scenarios; however survey student and administration costs would be half on a two year basis.

Table 1
Employment Survey Project Estimated Cost Comparison Annual vs. Every Two Years

Item	Annual	Every Two Years
Equipment ¹	\$ 40,685	\$ 40,685
Student Costs ²	\$ 231,250	\$ 121,200 ⁴
Survey Administration ³	\$ 38,370	\$ 19,185
Total Annual Estimate	\$ 310,305	\$ 181,070⁵

¹ Includes hardware, accessories and associated software

² Includes student salaries, uniforms and mileage

³ Includes staff time to administer survey during the 4 month collection period

⁴ Student costs include 1 additional student for business growth

⁵ Total includes equipment full cost, student costs divided in half and survey administration divided in half

The extent of local municipal savings would be dependent on the number of surveyed businesses in their respective municipality. The Region's savings would also include the elimination of the Employment Survey Administrator position budgeted for 2021, which equates to about \$130,000 annually. With this proposed removal, the survey will deliver on the proposed two-year cycle with the current staff resources leveraging the savings associated with removal of the 2021 position to support the Region's budget. No additional cost savings to the Region are expected as the resources currently allocated to the survey will be leveraged to support delivery of other core business.

As mentioned above, local municipal comments collected indicated that the resulting survey data provides good value for local municipal funding contributions, however, a survey every two years would reduce funding contributions and could assist with alleviating budgetary pressures and provide opportunities for investments in other projects at the local level.

6. Local Impact

York Region employment survey data is collected with the 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. York Region staff sought local municipal input when considering a two-year survey data collection cycle. Following staff's analysis, all local municipalities were advised of the shift to a two-year data collection cycle.

7. Conclusion

York Region's employment survey is a leading dataset that provides valuable information that other datasets cannot provide. Conducting the survey every two years will continue to provide valuable and quality data for Regional programs including infrastructure master plans, Regional Official Plan monitoring, employment forecasting and development charges by-law reviews. Council will continue to receive the Employment and Industry report every two years on survey results.

For more information on this report, please contact Sandra Malcic, Director, Long Range Planning at 1-877-464-9675 ext. 75274. Accessible formats or communication supports are available upon request.

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