



Centre for Urban Research and Land Development

Time to Transition Municipal Employment Surveys into an Annual GGH-Wide Employment Survey

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*The opinions expressed in this research report are those of the authors only and do not represent the opinions and views of either CUR or Ryerson University.

Report Prepared by:

Frank Clayton, Ph.D.
Senior Research Fellow

and

Hong Yun (Eva) Shi, M.Pl.
Research Assistant

Contact

Centre for Urban Research and Land Development,
Ryerson University
111 Gerrard St. East, 3rd Floor, GER 204-D, Toronto, ON
E-mail: cur@ryerson.ca
Phone: 416-979-5000 ext 3348

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Executive Summary

There is a need for accurate, consistent and timely information on employment trends throughout the Greater Toronto Area (GTA) and the larger Greater Golden Horseshoe (GGH) for land use planners, economic development professionals and decision-makers. This paper lays out the reasoning for our earlier plea for the launching of an annual GTA- or GGH-wide employment survey in place of the surveys now being conducted by several municipalities in the region (mainly upper-tier municipalities and the larger single-tier municipalities).

We discuss the shortcomings of the existing municipal employment surveys which include: inter-municipal variation in terms of coverage; timing; collection procedures; and consistency over time. The surveys also do not provide reliable employment growth estimates at the regional level or for many municipalities.

When comparing the estimates of employment in the municipal employment surveys in 2016 to the 2016 Census of Canada results for employees with a usual place of work, the employment survey estimates of total employment for five of the municipalities were about 7% to 14% above the Census estimates - an expected result. However, significant differences were found for two regional municipalities:

- For York Region, the disparity was much larger (40% more for the employment survey); and
- For Niagara Region, the employment survey estimates of total employment was much less than the Census estimates (28% less).

There are marked differences in employment growth estimates for the GGH and the GTA when comparing the municipal employment surveys to the Labour Force Survey (LFS) of Statistics Canada in 2017 and 2018. The differences are even more sizable at the municipal level, particularly for the City of Hamilton and Niagara Region:

- For Hamilton, the employment surveys show lower employment growth in 2017 than the LFS and a modest increase of 170 jobs in 2018 while the LFS showed job loss; and
- For Niagara Region, the municipal survey showed job growth in 2017 while the LFS showed job loss. For 2018, the municipal survey showed much more job growth than the LFS.

Clearly, the continuation of these differences in measuring employment growth is not tenable and alternatives to the existing municipal surveys should be explored and a different more accurate approach adopted.

Three options for countering the shortcomings of the existing municipal employment surveys are considered in the paper:

- **Option 1:** The Ontario Growth Secretariat at the Ministry of Municipal Affairs assumes responsibility for the collection, processing, release and funding of the annual employment and business count data;
- **Option 2:** The Growth Secretariat assumes overall responsibility for the annual employment surveys and their funding but delegates to municipalities the collection, processing and release of annual employment and business count data; or
- **Option 3:** The Growth Secretariat provides funding for the annual employment surveys while delegating the overall responsibility for the collection, processing and release of annual employment and business count data to the Regional Planning Commissioners of Ontario (RPCO) or its working group, the Regional Information Systems Working Group (RISWG). The RPCO in turn subcontracts with the municipalities to conduct the annual surveys under its supervision.

In our opinion, **Option 3** is preferred since it would result in regional planning commissioners acting in concert to produce consistent, meaningful and reliable employment data while utilizing the local knowledge and databases of GGH municipalities. However, it would be imperative that the RPCO be provided with the financial and staff resources necessary to undertake its responsibilities and ensure the successful completion of its mandate.

1. Background

The Centre for Urban Research and Land Development (CUR) has previously published two research reports looking at employment growth estimates for the GTA.¹ These estimates reflect the findings of the annual employment surveys conducted by the City of Toronto, the Regional Municipalities of Durham, York and Halton, and the City of Mississauga, in addition to a biannual survey by the City of Brampton and an irregular survey done by the Town of Caledon.

During the course of its earlier research, CUR concluded that:

- The employment surveys conducted by the individual municipalities do not provide reliable estimates of GTA employment growth; and
- In order to ensure the collection of comprehensive and consistent employment data throughout the GTA, employment surveys should be conducted and/or supervised by a centralized agency or body which would apply a standardized methodology to the process. This is not currently the case.

This paper lays out the reasoning for our plea for an annual GGH-wide employment survey.

2. Why should we be regularly monitoring employment trends and spatial distribution in the GGH?

Employment growth underpins the economic wellbeing of urban societies. With the speed of change seemingly ever-accelerating, it is imperative that key economic variables (such as employment, population, incomes, housing construction and affordability) and planning variables (such as commuting times) be monitored regularly and consistently to inform decision-makers in the private and public sectors.

As larger city-regions (census metropolitan areas or CMAs) are important economic engines for both the provinces and the country as a whole, microeconomic forecasters and policy makers would be better equipped to do their jobs should they have access to current and accurate data on employment trends at the regional level. This is essential to understanding the role of city-regions in the larger economy and for formulating policies that enhance economic and productivity growth.

While land use planners are also keen on understanding current employment trends at the regional level, they are typically even more interested in the location and type of employment growth taking place. For instance, the 2019 *Growth Plan for the Greater Golden Horseshoe* (the Growth Plan) directs larger office buildings and institutional users to urban growth centres and major transit station areas, while manufacturing, warehousing, and distribution users are to be located in employment areas (what used to be called industrial areas). It is important that both policies affected by employment and

population growth be regularly monitored and policies amended as required.

Economic development decision-makers have a vested interest in understanding trends in employment growth, not only in their own municipality, but in the region and in competing municipalities as well, to monitor the performance of their economic development efforts.

There is clearly a need for accurate, consistent and timely information on employment trends throughout the GTA and the larger GGH.

3. What kinds of employment information are needed?

In the Census of Canada, place of work status refers to whether a person:

- Worked at home;
- Had a usual workplace address (excluding homes);
- Did not have a fixed workplace location (e.g., couriers, taxi drivers); or
- Worked outside of Canada.

A classification of employees by industry adds analytical depth to these employment counts. The standard is the North American Industrial Classification System (NAICS) which is periodically updated.²

The classification of employment by type of building space or designation of land occupied is the one used in forecasting exercises for the GGH by consulting firms, such as Hemson Consulting. This classification consists of three major land-based categories:

- Major office employment (in freestanding office buildings of 20,000 sq. ft. or greater);
- Employment land employment (also called industrial employment) which includes

a range of employment uses within industrial-type buildings; and

- Population-related employment, such as those by retail and institutional establishments which provide services to a resident population.

Classification of how the universe of firms (establishments) changes over time by industry category, location, and size is also useful.

Whatever employment component or classification is adopted, it is imperative that the same framework be used consistently for employment surveys across the GGH. This is particularly important when looking at changes in employment on a year-by-year comparison which, analytically, are more interesting than the totals for any particular year.

3.1 What information exists?

Currently, three sources of employment data exist for CMAs or many municipalities within the GTA or the GGH: (1) the Census of Canada, (2) the Labour Force Survey of Statistics Canada, and (3) the municipal employment surveys.

The Census of Canada, conducted every five years, contains the most comprehensive and accurate data on employment across Canada. Based upon a survey of 20 percent of all households, it provides status of work data by industry and occupation broken down into very small geographic areas within larger urban centres referred to as dissemination areas.

The Labour Force Survey (LFS), carried out by Statistics Canada and available for Census Metropolitan Areas (CMAs), is a monthly household survey which collects information on employment, unemployment, and wages. Respondents indicate how many members of the household were working at the time of the survey.

Surveys of employment and business counts are also available for almost every

municipality in the Greater Toronto and Hamilton Area (the GTHA) – the single-tier Cities of Toronto and Hamilton, as well as the Regional Municipalities of York, Halton and Durham. In Peel Region, Mississauga conducts an annual survey while Brampton conducts a biannual survey. Caledon’s survey is done irregularly. Peel Region has also conducted its own biannual regional survey.

The latest municipal employment surveys available are:

- City of Toronto (2018)
- York Region (2018)
- Durham Region (2018)
- Halton Region (2018)
- Peel Region (2018)³ – Mississauga (2018), Brampton (2017), Caledon (2016)
- City of Hamilton (2017-2018); and
- Region of Niagara (2018).

There are also a limited number of employment surveys conducted outside the GTA in the GGH: Niagara Region conducts an annual survey.

4. What are the shortcomings of the current information?

4.1 Why are employment data from the Census of Canada not sufficient?

Issues with the Census of Canada employment data include:

- A five-year gap between survey years;
- The delayed release of data (16 months for the 2016 Census); and
- Challenges in using these data to categorize employment by land-use or building-type category.

Statistics Canada provides consistent annual estimates of population by census division (e.g. City of Toronto, York Region), but provides nothing comparable for employment.⁴

4.2 Why are employment data from the Labour Force Survey (LFS) not sufficient?

Issues with the LFS include:

- The sample size is comparatively small leading to sizable sampling errors associated with the estimates, especially for the smaller geographical areas;
- The LFS is available for economic regions such as CMAs but not for individual municipalities; and
- The LFS is a household survey that tracks employment by place of residence and not by place of employment.

4.3 What is wrong with the existing Municipal Employment Surveys?

A fundamental problem is that these survey results are not consistent between the municipalities or over time. They vary in terms of coverage, timing, and collection procedures.

4.3.1 Employment – Inconsistent Coverage

Currently, regions and municipalities within the GGH collect and compile employment survey information without centralized oversight or coordination. Though all surveys collect usual place of work data from individual employers, the types of questions asked differ (see Appendix Figure 1).

Most municipalities collect data only from establishments (locations with employees such as a bank branch), and only a few inquire about those working from home, working without a usual place of work, or working on a farm. Exceptions include Hamilton, which surveys home-based establishments where a visible signage is posted at the entry point and surveys farm-based establishments with a storefront presence.⁵ York Region depends on a web-based self-reporting business directory to contact home-based employers.⁶

This lack of consistency makes it difficult to systematically analyze and compare employment growth over time. Moreover, there is no metric to understand growth in the GTHA as a whole.

4.3.2 Universe of Employers - Inconsistent Coverage

The information gathered by various municipal employment surveys about employers is also inconsistent in coverage (see Appendix Figure 2):

- Only three municipalities collect data on the number of years an establishment has been at its current location, if they've moved since prior survey, or the ownership type (e.g. branch, franchise, independent):
- While all employment surveys collect data about the size of firms, the breakdown of results by category depends on the municipality. For instance, Halton Region has five categories for employment by size (e.g. establishments employing 1 to 4 persons, 5 to 10 persons, 11 to 99

persons, 100 to 499 persons, and over 500 persons). Some other municipalities, such as Durham Region, report their results at a higher level (establishments employing less than 10 persons, 11 to 100 persons, or over 100 persons).

4.3.3 Unclear Methodology

There is also a lack of clarity regarding the methodology and accuracy of the survey findings:

- Publicly available employment survey reports rarely present details of the methodology underlying the surveys. The majority of these surveys rely on in-person site visits to employers, as well as phone, online, mail, or email surveys; however there is no indication of exactly how the various surveys are conducted and integrated;
- Municipalities are often unclear as to how they maintain and update their universe of employers each year or how they handle non-responses from employers;
- It is also not clear as to how municipalities verify the accuracy of the results provided or on their editing procedures related to the survey responses; and
- Most surveys are conducted in English, which may contribute to a lower response rate by smaller ethnic businesses in some areas.

4.3.4 Methodological Differences Between Years

Changes in the survey methodologies from one year to the next can distort the results. Examples include:

• Durham Region – 2016

The Region of Durham reported 16,067 new jobs in 2016. However, in response to a request made by CUR, they clarified that 7,029 of these jobs represented those from existing businesses who responded to the survey for the first time in 2016. The remaining 9,038 originated from

new businesses or businesses that had expanded. Thus, the employment growth was significantly lower than the Region had reported.

- **City of Toronto – 2016**

The City of Toronto reported 38,740 new jobs in 2016. However, according to the survey publication “a significant component of the growth in 2016 is due to the new inclusion of 25,000 part-time Toronto District School Board employees.”⁷ After removing these jobs from the calculated change, Toronto’s employment growth for the City in 2016 stood at 13,740. To complicate matters further, the 2018 Employment Survey revised the TDSB employment counts for the 2016 and 2017 surveys.⁸

- **City of Toronto – 2018**

Toronto’s 2018 Employment mentions a “methodological revision” to previous employment counts.⁹ The Toronto 2018 Survey also noted several corrections to the 2017 Survey results due to double-counting or incorrect records.¹⁰

- **York Region – 2018**

In 2018, York Region stopped collecting information from farm-based surveys as the response rate was low, 8.9%, from the contacted farms.¹¹

- **Peel Region – 2016**

Peel Region reported 622,583 jobs in the 2016 publication. However, the 2018 Bulletin states that there were 662,680 jobs in Peel Region in 2016 without an explanation of methodological changes.

It should be noted that these instances represent only those discrepancies which have been reported on in the survey publications.

4.3.5 Duplication

Peel Region

The cities of Mississauga and Brampton both conduct municipal employment surveys, every one and two years

respectively. The Region of Peel now conducts a region-wide survey every two years. When comparing data from the Region of Peel with data from the City of Mississauga, there are discrepancies in the results. For instance, in 2018, Mississauga reported 438,168 total jobs while Peel Region reported 486,458 jobs. In contrast, Peel Region’s survey complements Brampton’s survey because Brampton conducts surveys on odd years (e.g. 2015 and 2017) while Peel Region conducts surveys on even years (e.g. 2014 and 2016). However, the results of the surveys cannot be combined due to the methodological differences in the two sources.

4.3.6 Publication – Differences in the ability of users to access results and data from the surveys

Aside from issues relating to inconsistent data collection methods and scope. Information is released is not consistent between municipalities.

- Many municipalities only make some of the information collected publicly available, either as an aggregate summary of their findings or as a business directory. Only Toronto, Mississauga, and Niagara Region had more data available online than what is published.

5. How do the employment estimates compare?

5.1 Census of Canada vs Municipal Employment Surveys

The number of jobs as indicated by the 2016 Census of Canada (usual place of work) and 2016 Municipal Employment Surveys differ by municipality (see Figure 1).

The employment survey estimates for five of the municipalities listed are 7 to 14% above the Census estimates in 2016. This result is to be expected since the Census surveys households, not places of work, and some employees have more than one job. However, for York Region, the disparity is much larger (40% more), while for Niagara Region, the reverse is true (28% less).

5.2 Labour Force Survey (LFS) vs Municipal Employment Surveys

Figure 2 compares the employment estimates and recent growth by the two sources – the LFS and the municipal employment surveys available for GGH municipalities between 2016 and 2018. CUR estimated employment for some municipalities where employment survey figures were not available for all years (see Appendix Figure 4 for a discussion how the estimates were calculated).

In this comparison, the following geographic areas are regarded as close approximations:

- GTA and the Toronto and Oshawa CMAs combined;
- City of Hamilton and the Hamilton CMA; and
- Niagara Region and the St. Catharines-Niagara CMA

Figure 1: Number of Jobs at a Usual Place of Work in 2016, Census of Canada vs Municipal Surveys, GGH*

	Number of Jobs		
	At a Usual Place of Work, Census 2016	2016 Municipal Employment Surveys	Survey as % of Census Estimates
GTA			
City of Toronto	1,341,000	1,461,020	1.09
York Region	424,000	595,200	1.40
Durham Region	173,000	193,630	1.12
Halton Region	206,000	224,299	1.09
Peel Region	568,000	609,711	1.07
GGH excluding GTA			
City of Hamilton	187,000	212,555	1.14
Niagara Region	152,000	110,138	0.72

Source: CUR, based on data from the 2016 Census of Canada and 2016 Municipal Surveys *Where municipal employment surveys were available

When looking at the grand total for the GGH, both sources show lower employment growth in 2018 than in 2017, but the decline is much larger in the municipal employment surveys (see Figure 2):

- Growth of 97,600 employed persons in the LFS versus 123,504 jobs in the employment surveys in 2017; and
- Growth of 73,600 employed persons in the LFS versus 70,825 jobs in the employment surveys in 2018.

When we look at the individual geographic areas, there are very large differences between the two sources:

- The LFS shows stable employment growth for the GTA of 71,000 and 73,600 in 2017 and 2018, respectively. The employment surveys show a sharp decline in job creation from 99,203 to 59,615 in 2017 and 2018, respectively;
- The LFS shows employment growth for the Hamilton CMA of 32,100 in 2017,

which is significantly higher than that of the municipal employment survey (3,295). For 2018, the LFS shows a decline in employment of 4,100 persons while the municipal survey shows a growth of 200 jobs; and

- Niagara Region had a net loss in the number of employed persons in 2017 and modest growth in 2018 according to the LFS – in contrast the municipal survey showed much higher job growth of 21,006 and 11,040 in 2017 and 2018, respectively.

These differences could be attributable to deficiencies in both sources of employment data, but our suspicion is that the inconsistencies in the collection and processing of data for the employment surveys is the major contributor.

Figure 2: Comparing Employment Growth between the Labour Force Survey and the Municipal Employment Surveys, Select GGH Municipalities, 2016-2018*

Labour Force Survey	Employment Growth (Persons)		Municipal Employment Surveys	Employment Growth (Jobs)	
	2017	2018		2017	2018
City of Toronto CMA	74,600	63,400	City of Toronto	55,460	26,930
Oshawa CMA	-3,600	10,200	York Region	25,330	16,100
			Durham Region	3,083	3,578
			Halton Region	7,277	-2,446
			City of Mississauga	2,459	9,859
			City of Brampton	4,720*	4,720*
			City of Caledon	874	874
GTA Total	71,000	73,600		99,203	59,615
Hamilton CMA	32,100	-4,100	City of Hamilton	3,295	200
St. Catharines-Niagara CMA	-5,500	4,100	Niagara Region	21,006	11,040
GGH Grand Total	97,600	73,600		123,504	70,825

Source: CUR, based on data from Statistic Canada's Labour Force Survey (LFS) and municipal employment surveys. See Appendix Figures 3 and 4 for more information about how CUR derived these estimates

6. What should be done to collect more consistent and reliable annual employment and business data for the GGH?

The status quo is not acceptable – valuable financial resources are being expended on individual surveys which are not producing reliable results. The capture of comprehensive and consistent employment, and business data from throughout the GGH requires that the surveys be conducted by, or directly supervised by, a centralized agency using a standardized methodology.

This could be accomplished through the use of one of the following options:

- **Option 1:** The Ontario Growth Secretariat at the Ministry of Municipal Affairs assumes responsibility for the collection, processing, release and funding of the annual employment and business count data;
- **Option 2:** The Growth Secretariat assumes overall responsibility for the annual employment surveys and their funding but delegates to municipalities the collection, processing and release of annual employment and business count data; or
- **Option 3:** The Growth Secretariat provides funding for the annual employment surveys while delegating the overall responsibility for the collection, processing and release of annual employment and business count data to the Regional Planning Commissioners of Ontario (RPCO) or its working group, the Regional Information Systems Working Group (RISWG). The RPCO in turn subcontracts with the municipalities to conduct the annual surveys under its supervision.

In our opinion, **Option 3** is preferred since it would result in regional planning commissioners acting in concert to produce consistent, meaningful and reliable employment data while utilizing the local knowledge and databases of GGH municipalities. However, it would be imperative that the RPCO be provided with the financial and staff resources necessary to undertake its responsibilities and ensure the successful completion of its mandate.

Endnotes

- 1 See Clayton, Frank & Ng, Jodee (2017). "Critique of 2016 Employment Surveys and Economic Nuggets: GTA Municipalities." Centre for Urban Research and Land Development. [Online] Available: https://www.ryerson.ca/content/dam/cur/pdfs/Projects/CURReport_Critiqueof2016EmploymentSurveys_2017.11.20.pdf and Shin, Justin. (2016). "What Municipal Employment Surveys Tell Us About Recent Employment Growth in the Greater Toronto Area." Centre for Urban Research & Land Development. [Online] Available: https://www.ryerson.ca/content/dam/cur/pdfs/Projects/CUR%20Report_Municipal%20Employment%20Surveys_2016.10.03.pdf
- 2 The North American Industrial Classification System (NAICS), used by Statistics Canada, was last updated in 2017.
- 3 Even though Peel Region conducts employment surveys, this report uses data from the 2015 to 2018 municipal employment surveys of Mississauga and Brampton for the analysis due to more regular surveying.
- 4 See Statistics Canada. (2019). "Table 14-10-0096-01 Labour force characteristics by census metropolitan area, annual." [Online] Available: <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410009601>
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- 9 Ibid. 9, 29
- 10 Ibid., 29
- 11 York Region. (2019). "2018 Employment & Industry Report," 24 [Online]. Available: <https://www.yorklink.ca/york-region-employment-survey/>

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Appendix

Figure 1: Survey Questions Asked in Municipal Employment Surveys

	Types of Employment	No Fixed Place of Work	Home-based Businesses	Farm-based Businesses	Job Sector / Industry (NAICS 2017)	Breakdown by Municipality
City of Toronto, 2018	· Full-time	x			x	N/A
	· Part-time					
York Region, 2018	· Full-time				x	York Region collects this data but does not publicly release it
	· Part-time					
	· Contract		x			
	· Seasonal					
Durham Region, 2018	· Full-time			x	x	x
	· Part-time					
Halton Region, 2018	· Full-time				x	x
	· Part-time					
Peel Region, 2018	· Full-time				x	x
	· Part-time					
	· Contract					
	· Other					
City of Mississauga, 2018	· Full-time	x	x		x	N/A
	· Part-time					
	· Temporary					
City of Brampton, 2017	· Full-time				x	N/A
	· Part-time					
	· Contract					
Caledon, 2016	· Full-time	x		x		N/A
	· Contract and/or seasonal					
City of Hamilton, 2016-2017	· Full-time				x	N/A
	· Part-time		x	x		
	· Seasonal					
Niagara Region 2019	· Full-time				x	X
	· Part-time					

Source: CUR based on data from the published Municipal Employment Surveys

Figure 2: Establishment Survey Questions Asked in Municipal Employment Surveys

	Size of Firms (Number of Jobs per Business)	Business by Floor Area	Length of Business Establishment at Location and Relocations	Location of Business	Ownership
Toronto 2018	x		x	x	
York Region 2018	x				
Durham Region 2018	x	x		x	Branch Franchise Independent Institutional Public Not reported
Halton Region 2018	x	x	x	x	Independent Franchise Branch/ subsidiary Government Institutional
Peel Region 2018	x				
Mississauga 2018	x		x	x	
Brampton 2017	x			x	
Hamilton 2016-2017	x			x	
Niagara 2019	x			x	

Source: CUR based on data from the published Municipal Employment Surveys

Figure 3 : Total Employment and Growth, per Labour Force Survey, Select CMAs, 2016-2018*

	Total Employment (Persons)			Employment Growth (Persons)	
	2016	2017	2018	2017	2018
GTA					
Toronto CMA	3,215,000	3,289,600	3,353,000	74,600	63,400
Oshawa CMA	214,000	210,400	220,600	-3,600	10,200
GTA Total	3,429,000	3,500,000	3,573,600	71,000	73,600
GGH excluding GTA					
Hamilton CMA	385,800	417,900	413,800	32,100	-4,100
St. Catharines-Niagara CMA	203,100	197,600	201,700	-5,500	4,100
Grand Total	4,017,900	4,115,500	4,189,100	97,600	73,600

Source: CUR, based on data from Statistic Canada's Labour Force Survey (LFS)

*Employment by place of residence

Figure 4: CUR Estimates for Missing Municipal Survey Data, Employment 2016-2018*

	Total Employment (Jobs)			Employment Growth (Jobs)	
	2016	2017	2018	2016 - 2017	2017 - 2018
GTA					
City of Toronto	1,440,790	1,496,250	1,523,180	55,460	26,930
York Region	595,200	620,530	636,630	25,330	16,100
Durham Region	193,630	196,713	200,291	3,083	3,578
Halton Region	224,299	231,576	229,130	7,277	-2,446
City of Mississauga	425,850	428,309	438,168	2,459	9,859
City of Brampton	150,584**	160,023	N/A	4,720***	4,720***
City of Caledon	33,277	N/A	35,024	874***	874***
GTA Total				99,203	59,615
City of Hamilton	212,555	215,850	216,050	3,295	200
Niagara Region	110,138	131,144	142,184	21,006	11,040
Grand Total				123,504	70,825

* The biannual Peel Region Employment Survey is conducted independently of the Mississauga and Brampton employment surveys. This Figure uses the Mississauga and Brampton employment survey results rather than the Peel Region results. For Caledon, the figure relies on the Peel Region estimates

** The numbers listed here for the City of Brampton refer to Total Employment for 2015

*** The growth over two years is assumed to be equally divided in each year

Source: CUR based on data from Municipal Employment Surveys