

**REGION OF WATERLOO****PLANNING, HOUSING AND COMMUNITY SERVICES**  
**Community Services**

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**TO:** Chair Jim Wideman and Members of the Planning and Works Committee

**DATE:** March 20, 2012 **FILE CODE:** D15-70

**SUBJECT: WORKPLACE COUNT - REPORT ON PLACES OF EMPLOYMENT IN THE REGION OF WATERLOO**

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**RECOMMENDATION:**

THAT the Regional Municipality of Waterloo receive Report P-12-038, Workplace Count - Report on Places of Employment in Waterloo Region, dated March 20, 2012, for information;

AND THAT this report and the Workplace Count summary data be made available to all Area Municipalities in the Region of Waterloo, Canada's Technology Triangle (CTT), the Chambers of Commerce, and other interested parties, to provide a summary of the findings of the 2011 Workplace Count project, and to request support in participating in future surveys.

**SUMMARY:**

The first comprehensive "Workplace Count" project in Waterloo Region was undertaken from May to August of 2011, to collect data about places of employment for land use and infrastructure/service planning purposes. Collaboration with Area Municipalities on this project also ensured the usefulness of the results for economic development purposes. The Workplace Count project was initially described to Council and the public in Report P-11-031 'Proposed Place of Employment Survey' (March 8, 2011).

As of mid-2011, there were 12,000 active places of work in the cities and settlement areas of Waterloo Region. These workplaces include businesses, schools, government offices, and community organizations. There were an additional 650 business locations that were either recently built and not yet occupied, or were vacant. The Workplace Count project did not include farms or home-based businesses.

Approximately 245,000 employees are estimated to work in the cities and settlement areas (excluding those working on farms and at home, or with no fixed place of work). This estimate is based on employment data provided by over 70% of the places of work, and derived information for the remainder. A total employment estimate for the Region would be 16% to 18% higher, as it would also include those working at home and on farms or with no fixed place of work; data to inform a total employment estimate will not be available until the 2011 National Household Survey reports Place of Work data, expected in mid-2013. Adding 16% to 18% to the Workplace Count employment results in an estimated total 2011 employment of 284,000-289,000. Places to Grow estimated a Regional employment of 282,000 for 2011; this estimate was published in 2006, based on 2001 data. There are no other comparable employment estimates available for the Region. The Labour Force data is not comparable, as it estimates employed persons for the Census Metropolitan Area (CMA), not jobs in the Region.

The extensive employment data collected through the Workplace Count reflects the overall picture of employment in the cities and settlement areas of the Region. Key findings, which are consistent with historic data and information compiled by other sources such as Canada's Technology

Triangle, include:

- Traditional manufacturing is the predominant sector for workplaces, measured by number of employees, representing 21% of employment, or about 1 in 5 employees.
- Just over 1% of workplaces provide almost 1/3 of the jobs in the Region's economy.
- About 1/3 of workplaces are located in designated employment lands.

In addition, the Workplace Count results will provide solid 2011 baseline information for smaller geographies such as the Central Transit Corridor, rapid transit station areas, core areas, etc.

The report "Workplaces in Waterloo Region, 2011" will be available from Planning, Housing and Community Services, as well as on the Region's website. The individual data records are not intended for public release unless specifically authorized by the workplace for publication. Data from the Workplace Count project will also be provided to the Area Municipalities and Canada's Technology Triangle for planning purposes.

To identify trends and changes in the Regional economy, future Workplace Counts are planned to be undertaken in five-year intervals. Staff will also investigate other collaborative opportunities to update the data.

#### **REPORT:**

The Region's first Workplace Count was undertaken from May to August of 2011 to collect data about places of employment in Waterloo Region. The Workplace Count project successfully gathered data from over 12,000 businesses, government agencies and other organizations located in the cities and settlement areas of the Region. In addition to the workplaces and employees that were counted through this project, there are other employment locations in the Region that were not within the scope of this project. These include people who work at home, or who do not report to a regular workplace, as well as employment associated with on-farm businesses and other businesses located outside of the settlement areas in the Townships.

Data from the Workplace Count is the most comprehensive, detailed, accurate and current data available on this topic. While the data was primarily gathered for landuse and service planning purposes, collaboration with Area Municipalities on this project also ensured the usefulness of the results for economic development purposes.

Current uses include:

- Active transportation: TravelWise Transportation Management Association program;
- Transit planning : evaluating expansion of bus services to the L.G. Lovell Business Park in Cambridge;
- Planning for Rapid Transit: Corridor Development Strategy;
- Water protection policy development and implementation: Clean Water Act Source Protection Plan;
- Input to local area planning studies: the City of Waterloo's Northdale Land Use and Community Improvement Plan Study;
- Updating business registries and directories;
- Business retention and attraction: the Foreign Multinational Aftercare Calling Program, initiated by Canada's Technology Triangle (CTT);
- Evaluation of development planning applications;
- Formulating planning policy and monitoring growth for the Regional Official Plan: calibrating employee – space ratios that are used in the Population and Land Use Model to forecast the number of employees;
- Creating employment estimates and growth forecasts for infrastructure planning purposes, including water and wastewater servicing planning;

- Transportation planning: calibration of the transportation demand model for the Regional Transportation Master Plan; and
- Joint Regional and Area Municipal strategic projects: the Regional Economic Development Study.

When the Workplace Count project is repeated in 2016, the data can be used for identifying and analysing trends in the economy and urban structure.

## Summary of Findings

Key findings from the Workplace Count are:

- 12,000 active places of work were counted in the cities and settlement areas of Waterloo Region. There were an additional 650 business locations that were counted as built but not yet occupied, or vacant.
- Approximately 245,000 employees are estimated to work in these locations. This is not total employment, which would be about 16% to 20% higher, after accounting for employment on farms, at home or not at a regular workplace. Adding 16% to 18% to the Workplace Count employment results in an estimated total 2011 employment of 284,000-289,000. Places to Grow estimated a Regional employment of 282,000 for 2011; this estimate was published in 2006, based on 2001 data. There are no other employment estimates available for the Region. The Labour Force data is not comparable, as it estimates employed persons for the Census Metropolitan Area (CMA), not jobs in the Region.
- Almost ¾ of all employees working in the Region are in full-time jobs. Part-time employment was primarily in the retail sector, followed by accommodation & food services.
- Traditional manufacturing was the predominant sector for workplaces in the Region, measured by number of employees; it reflects 21% of employment, or about 1 in 5 employees. Manufacturing occupies about 1/3 of the built floor space in the Region.
- The largest number of workplaces was in the retail sector, representing almost 1 in 5 workplace locations.
- Firms considered to be “high-tech” represented 575 counted businesses, about 8% of workplaces. Additionally, high-tech firms are known to exist in home-based businesses, while yet more provide services such as legal and communication services to the high-tech sector.
- Just over 1% of workplaces in Waterloo Region provide almost 1/3 of the jobs.
- Almost 2/3 of workplaces have fewer than ten employees.
- 35% of workplaces are located in designated industrial and business park lands as identified in Area Municipal Official Plans.

These findings are consistent with historic data, previous forecasts, and information available from other sources such as Canada’s Technology Triangle.

A full report of the results of the Workplace Count project is presented in the document “Workplaces in Waterloo Region, 2011.” This report provides statistics and analysis of data from the Workplace Count as well as details on survey methodology, an analysis of data quality, and comparisons with other employment data such as Census and Labour Force Survey data. It will be available from Planning, Housing and Community Services, as well as on the Region’s website.

## Area Municipal Consultation/Coordination

A Municipal Advisory Group was formed during the planning stages of this project to provide for input from the Area Municipalities. This group was very effective in contributing to the form of the

survey, providing respite locations and parking for surveyors and communicating with local businesses and organizations. Several Area Municipal economic development staff also collected data from large employers to contribute to the survey. Area Municipalities are receiving the data from this project, under the terms of a Letter of Understanding. A sincere thanks is extended to all Area Municipal staff who helped to make this project a success.

#### **CORPORATE STRATEGIC PLAN:**

The 2011 Workplace Count data can be used in many projects that support the Strategic Objectives of Focus Area 2: Growth Management and Prosperity.

#### **FINANCIAL IMPLICATIONS:**

The cost of the initial Workplace Count project was \$125,000. Due to budget limitations, the Workplace Count project is budgeted to be undertaken only every five years, aligned with the Census of Canada years. Therefore, the next Workplace Count would be in 2016. Although it had been earlier anticipated that future surveys would not incur the same start-up costs as the 2011 survey, due to the 5-year gap between surveys, it is not anticipated that cost efficiencies will be achieved in subsequent years. In the interim years, smaller targeted surveys may be undertaken such as surveys of high tech firms or companies located in business parks. Opportunities for such surveys will be investigated within Regional Departments as well as with Area Municipalities, other Regions and the Province over the coming months.

#### **OTHER DEPARTMENT CONSULTATIONS/CONCURRENCE:**

Transportation and Environmental Services, Information Technology, Social Services and Public Health have been consulted through this project.

#### **ATTACHMENTS:**

NIL

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**APPROVED BY:** *Lucille Bish, Acting Commissioner of Planning, Housing and Community Services*