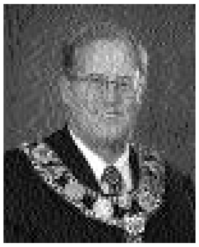
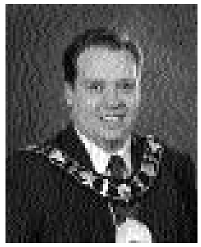
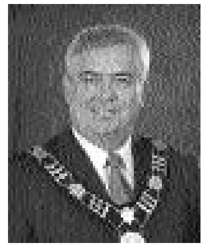
Ontario's Rising Star
York Region
Markham · Vaughan · Richmond Hill · Newmarket · Aurora
Georgina · Whitchurch-Stouffville · East Gwillimbury · King

Employment and Industry 2003


Mayor
Tom Taylor
Town of Newmarket

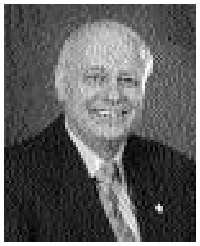

Mayor
Tim Jones
Town of Aurora

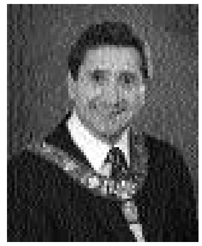

Mayor
James Young
Town of East Gwillimbury

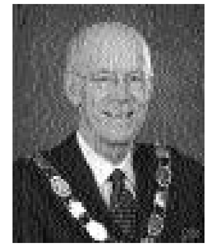

Mayor
Robert Grossi
Town of Georgina


Regional Councillor
Danny Wheeler
Town of Georgina


Mayor
Margaret Black
Township of King


Regional Councillor
A.J. (Tony) Van Bynen
Town of Newmarket


Regional Chair and CEO
Bill Fisch


Mayor
Donald Cousens
Town of Markham

Message from York Regional Council

The York Region economy continued to grow in 2003 despite several economic challenges including SARS, reduced demand for exports due to a rising Canadian dollar and the August power blackout. As of year-end 2003, there were 415,000 jobs in York Region, representing an average annual employment growth rate of 7.1% since 1998. This growth rate exceeds both national and provincial averages and is a good indicator of the confidence the business community has in the Region.

An estimated 26,000 businesses called York Region home in 2003, ranging from small home-based businesses to large multi-national corporations. Our business community continues to expand, growing 4.8% on an average annual basis since 1998.

To accommodate this growth, York Region continues to invest in transit, infrastructure and human services. We are also committed to keeping our finger on the pulse of the business community by conducting an annual business and employment survey. The results of this survey are used to monitor the Regional economy, promote local businesses and industry clusters, forecast future transit and infrastructure needs and to assist businesses in export development. This publication is one product derived from this survey.

The findings of this year's survey are promising. In a year filled with several economic challenges, the York Region economy has continued to shine. Our economy is becoming increasingly diverse, with growth evident across the Region in a number of industry sectors. From computers/electronics and auto parts manufacturing to a burgeoning business sector and some of the most productive farmland in Ontario, this diversity offers residents a variety of jobs and helps to insulate us from shifting business cycles. A number of local and international firms also expressed their confidence in York Region in 2003 by spending $873M to expand or develop new facilities locally. This represents an increase of 47.4% over the value of non-residential building permits issued in 2002.

Our economic strength has helped to create an enviable quality of life for York Region residents and a strong environment in which to do business. For more information on business opportunities in York Region, please contact one of our local or regional economic development contacts at the back of this publication.

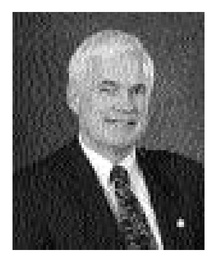

Mayor
William F. Bell
Town of Richmond Hill

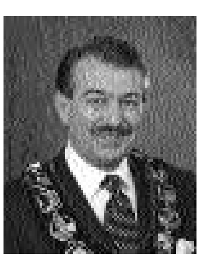

Regional Councillor
David Barrow
Town of Richmond Hill


Regional Councillor
Brenda Hogg
Town of Richmond Hill


Regional Councillor
Frank Scarpitti
Town of Markham


Regional Councillor
Jack Heath
Town of Markham


Regional Councillor
Jim Jones
Town of Markham


Mayor
Michael Di Biase
City of Vaughan


Regional Councillor
Mario Ferri
City of Vaughan


Regional Councillor
Linda D. Jackson
City of Vaughan


Regional Councillor
Joyce Frustaglio
City of Vaughan


Mayor
Sue Sherban
Town of Whitchurch-Stouffville


Regional Councillor
Bill O'Donnell
Town of Markham

Highlights

The following report presents the findings of the 2003 York Region Employment Survey. Areas targeted for analysis included designated employment areas and rural community centres.

Some of the major findings include:

- Following a solid year of economic growth in 2002, the Canadian economy was dealt several setbacks in 2003. Canadian Gross Domestic Product (GDP) expanded by an estimated 1.6% in 2003, down from 3.3% in 2002.

- Low interest rates in 2003 spurred strong domestic demand for consumer goods. While down 6.2% from last year's record high, the number of new motor vehicles sold in 2003 was still the second-highest level recorded. National housing starts also approached record levels in 2003, recording their highest rate in 15 years.

- Canadian businesses also contributed to the economic recovery through construction and increased investment in machinery and equipment. Total capital spending of public and private institutions in Canada was up 3.8% in 2003 from a year earlier.

- Provincially, the Ontario economy mirrored that of the Canadian economy in many respects in 2003, with positive GDP growth and a strong housing market. Real GDP growth in Ontario grew by 1.8% in 2003 compared to 3.8% in 2002. Meanwhile, housing starts increased 1.9% over 2002 levels.

- Employment growth in York Region was on target with projections and has outpaced both national and provincial averages over the past five years. Between 1998 and 2003, employment in York Region has grown at an annual average rate of 7.1%. Comparatively, national and provincial employment grew at annual average rates of 2.3% and 2.7%.

- As of year-end 2003, there were approximately 415,000 jobs in York Region, excluding home and farm-based employment. Based on the results of the 2003 Employment Survey, all nine area municipalities recorded positive employment growth rates between 1998 and 2003.

- Full-time jobs accounted for 79.1% of jobs in York Region in 2003, compared with 79.5% in 1998. The number of part-time jobs increased slightly as a proportion of overall employment during this period, rising from 14.5% to 16.5%. Seasonal employment accounted for the remaining 4.4% in 2003.

- In 2003, 83.4% of York Region's 26,000 firms employed less than 20 people. This large number of small firms is indicative of a strong entrepreneurial spirit in the Region.

- On an average annual basis, the fastest growing employment sectors in York Region between 1998 and 2003 were business services (9.6%), retail trade (7.7%), education (7.5%) and the finance, insurance and real estate (FIRE) sector (6.7%).

- Approximately 9.1% of respondents to the York Region Employment survey indicated that they exported goods in 2003, while 80.6% did not. A further 10.3% of respondents were unable to confirm their company's export status when surveyed.

- Business mobility (the rate at which businesses in a given area have closed or relocated outside of the survey area as a percentage of total firms) averaged 7.8% annually in York Region during the 1998 to 2003 period. Mobility rates varied by municipality, with rates among rural municipalities ranging from 3.0%-6.4% and 7.8%-8.9% in urban areas.

- Among new firms that opened within the survey area between 1998 and 2003, 32.3% were in the personal services sector, 27.8% were in business services and 20.6% were in retail trade.

- Hiring expectations within the York Region business community were down from 2002 levels, likely due to the many economic setbacks felt across the Canadian economy over the past year. An estimated 17.4% of businesses indicated their intent to hire in 2003, down from 27.4% in 2002.

Contents

Introduction

The purpose of this report is to monitor the location, type and characteristics of businesses in York Region, in support of Regional Official Plan policies aimed at creating “a competitive and adaptable economic environment that encourages investment and a diversity of employment opportunities.”

The 2003 York Region Employment Survey helps to better understand the diversity of employment opportunities across the Region and monitor local and global economic trends and their impact on regional employment levels. The survey is also an integral component of the Economic Development Strategy, providing business data that supports business directory products, cluster analysis, employment area profiles and promotional activities.

This information is also used as background data for a variety of purposes, including land use planning, forecasting, infrastructure planning as well as co-ordinating services.

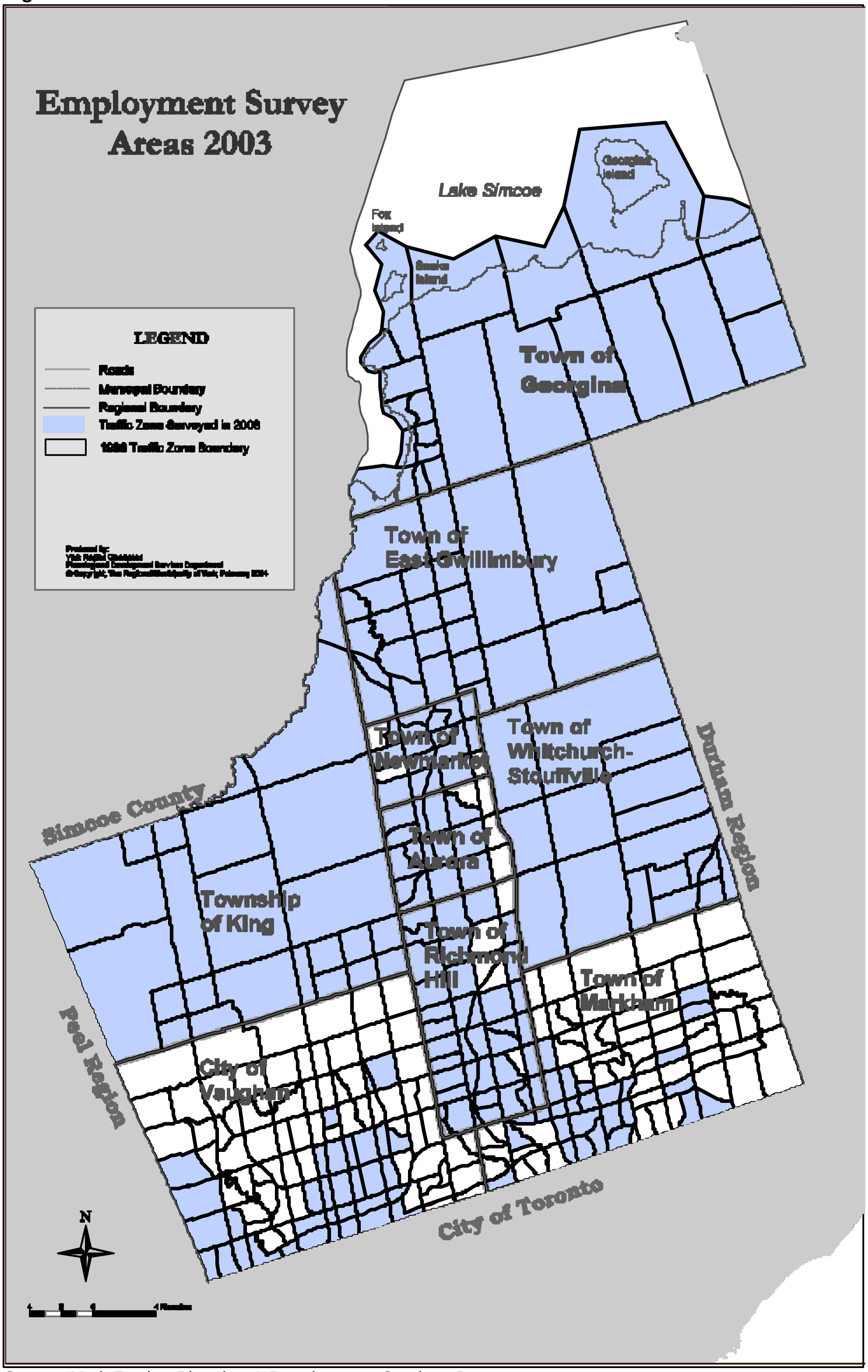
Background Methodology

This report is based on information collected from a survey conducted with businesses located in York Region between May and August 2003. The primary method of data collection was through door-to-door interviews, with supplemental collection obtained through e-mail and fax submissions. Where data could not be updated for a particular business, data was supplemented with the most recent information available from previous surveys.

The 2003 survey area included all non-residential traffic zones in Aurora, East Gwillimbury, Georgina, King, Newmarket and Richmond Hill, along with designated employment areas in Markham and Vaughan (see Figure 1: Employment Survey Areas 2003). Focussing on employment at the traffic zone level allows for a detailed examination of local trends and provides information about employment areas at a level that is useful for investment and economic development decisions. At the aggregated level, this analysis offers an indication of how the York Region economy is performing and helps determine whether the economic development goals of York Region are being met. In particular, the overall analysis helps us see whether enough jobs are being generated in the Region for the growing population.

The last comprehensive employment survey conducted in the Region was in 1998, with over 21,000 businesses surveyed. Subsequent surveys in 2001 and 2002 targeted high-growth areas and regional centres, surveying 6,000 and 8,250 businesses, respectively. With the assistance of area municipalities, a total of over 19,110 companies were contacted in 2003, with a 69.8% response rate. These 13,340 firms accounted for an estimated 53.1% of total Regional businesses in 2003.

Figure 1 :



Source: York Region Planning & Development Services Department

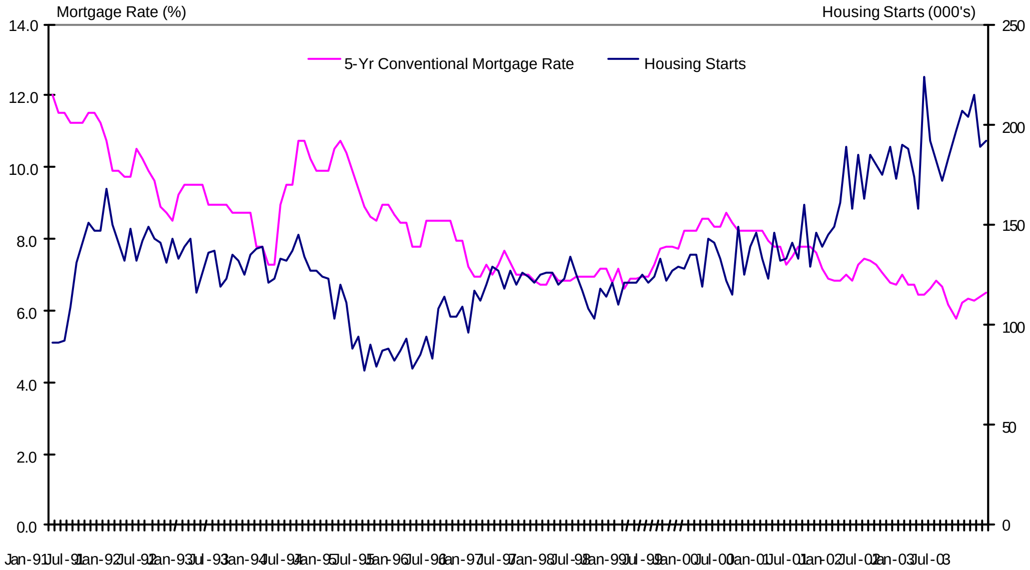
National Economic & Employment Overview

Canadian Economy Struggles in 2003, but Stays the Course

Following a solid year of economic growth in 2002, the Canadian economy was dealt several setbacks in 2003. Forest fires in BC, coupled with the mad cow crisis in Alberta, the SARS outbreak in the GTA, the August power outage in Ontario and Hurricane Juan in the Maritimes all presented unexpected challenges to the Canadian economy. These factors, coupled with a rising Canadian dollar which weakened export growth, slowed the rate of economic growth in 2003. Canadian Gross Domestic Product (GDP) expanded by an estimated 1.6% in 2003, down from 3.3% in 2002.

In an effort to contain the rapidly appreciating dollar, the Bank of Canada continued to lower interest rates in 2003. This, in turn, spurred strong domestic demand for consumer goods. While down 6.2% from last year's record high, the number of new motor vehicles sold in 2003 was still the second-highest level recorded. National housing starts also approached record levels in 2003, recording their highest rate in 15 years. Total housing starts in 2003 reached 219,400, an increase of 9.2% over 2002 (see Figure 2: Five-Year Mortgage Rate and Housing Starts, Canada, 1991-2003).

Figure 2:
Five-Year Mortgage Rate and Housing Starts, Canada, 1991-2003

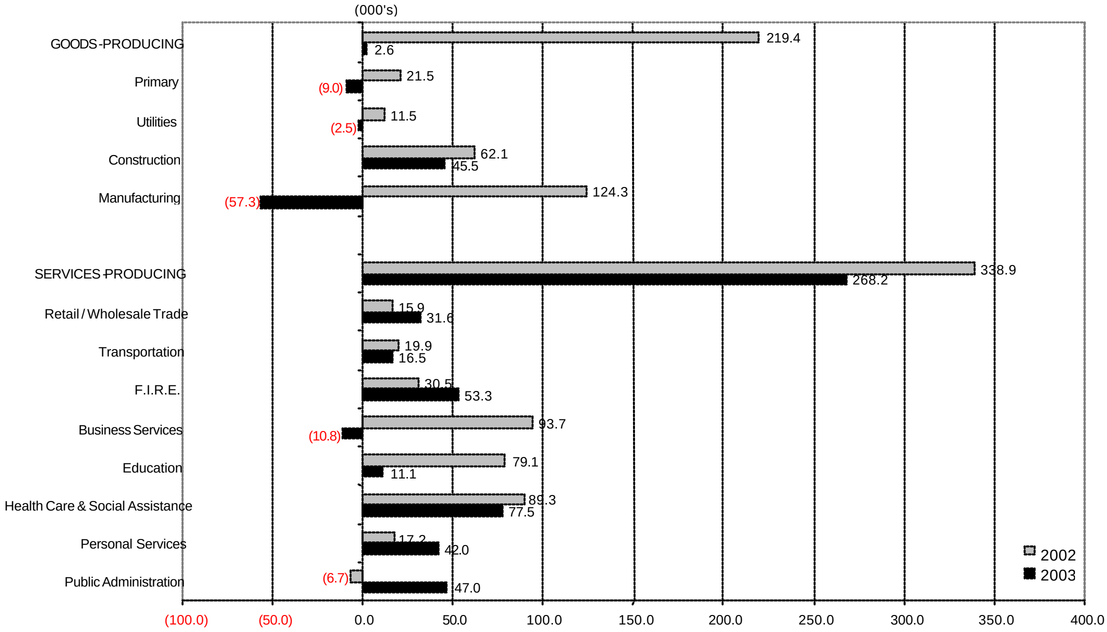


Note: Housing starts are seasonally adjusted at annual rates.
Source: Bank of Canada (mortgage rate) and Statistics Canada (housing starts)

Consumer spending on the retail front saw sales in 2003 increasing 3.1% from 2002 levels, totalling $316 billion, with particular strength in the furniture sector. Buoyed by the strength of the housing market, furniture stores outpaced the retail sector as a whole in 2003, growing by 6.5% since 2002. Canadian businesses also contributed to the economic recovery through construction and increased investment in machinery and equipment. Total capital spending of public and private institutions in Canada reached $217.2 billion in 2003, up 3.8% from a year ago.

Job creation slowed in Canada in 2003, increasing just 2.2% over 2002 levels, compared to a 3.7% increase from 2001-2002. In total, an estimated 334,000 net new jobs were added in Canada in 2003. In the goods-producing sector, manufacturing was hardest hit as the high Canadian dollar weakened demand for Canadian goods abroad. In contrast, construction-related employment saw an increase of over 45,000 jobs in 2003 due in large part to continued strength in the housing sector (see Figure 3: Employment Growth by Industry, Canada, 2002 & 2003).

Figure 3:
Employment Growth by Industry, Canada, 2002 & 2003

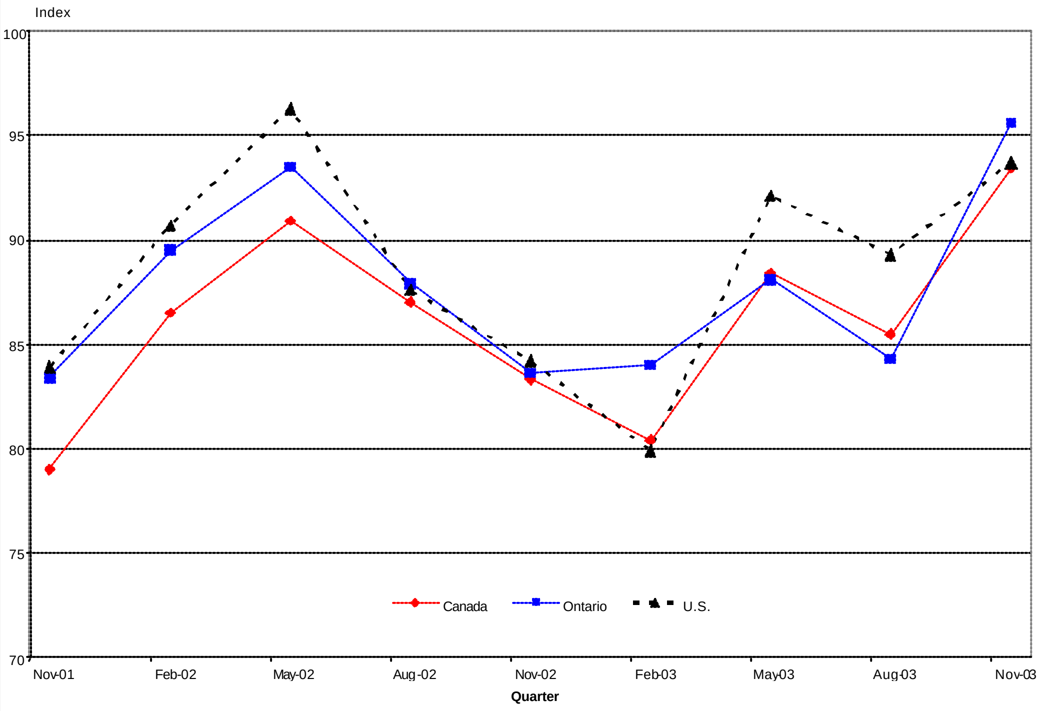


Trade: Retail & wholesale trade.
F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Misc. Services: Information, Culture & Recreation; Accommodation & Food Services; and Other Services.
Note: Data are seasonally adjusted at annual rates.
Source: Statistics Canada

For the service-producing sector, the health care & social assistance and finance, insurance, real estate rental & leasing (FIRE) sectors accounted for the largest employment gains in 2003, continuing the strong employment gains from a year earlier. Job growth was also apparent in the public administration sector, reversing the negative growth rate experienced in 2002. After a strong showing in 2002, the business services sector stalled in 2003, losing roughly 11,000 jobs. The national unemployment rate averaged 7.6% in 2003, down slightly from 7.7% a year earlier.

Canadian consumer confidence reached a record high at year-end 2003, despite a drop in August which was likely negatively influenced by the SARS outbreak and the August power blackout (see Figure 4: Consumer Confidence Index, Canada, Ontario and U.S., 2001-2003).

Figure 4:
Consumer Confidence Index, Canada, Ontario and U.S., 2001-2003



Source: Decima-Investors Group (Canada and Ontario); University of Michigan (U.S.)

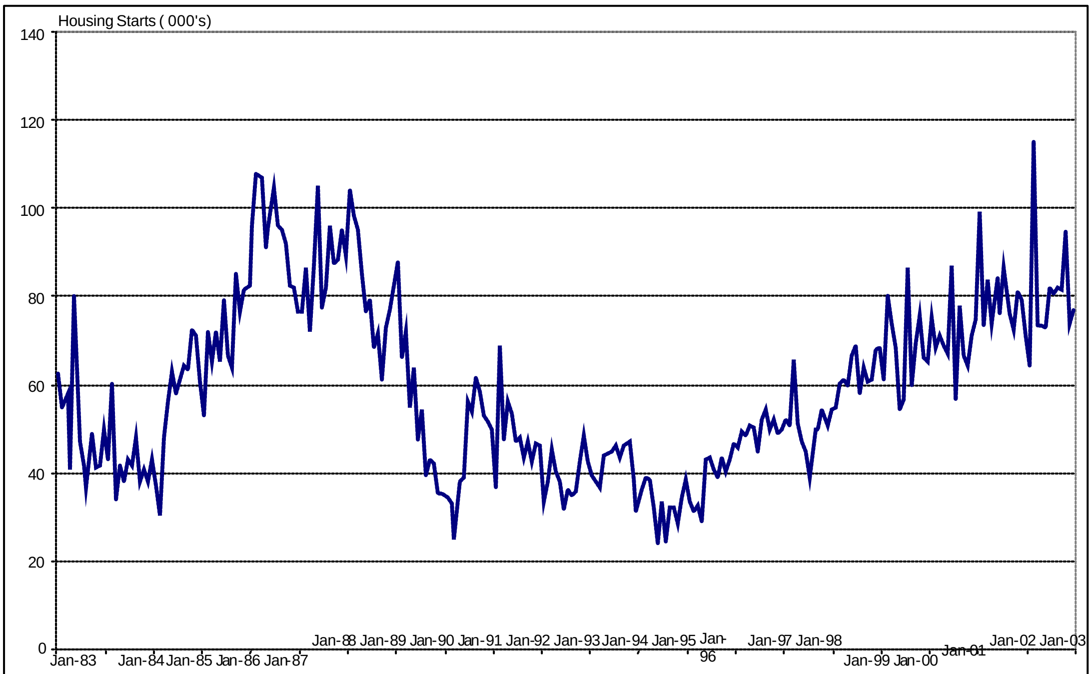
High levels of consumer confidence have been a key factor in Canada's economic recovery over the past few years, with heightened levels of demand for durable goods leading to increases in production, employment and investment nation-wide. South of the border, consumer confidence increased in 2003 following the end of the initial phase of the war in Iraq, solid productivity gains, low interest rates and a strong monetary stimulus package.

Provincial Economic & Employment Overview

Ontario Economy Slowed, but Remained Positive in 2003

The Ontario economy mirrored that of the Canadian economy in many respects in 2003, with positive GDP growth, a strong housing market and significant employment gains. Real GDP growth in Ontario slowed in 2003 but remained positive, growing by 1.8% compared to 3.8% in 2002. Housing starts, on the other hand, reached 85,180 units in 2003, an increase of 1.9% over 2002 (see Figure 5: Ontario Housing Starts, 1982-2003).

Figure 5:
Ontario Housing Starts, 1982-2003

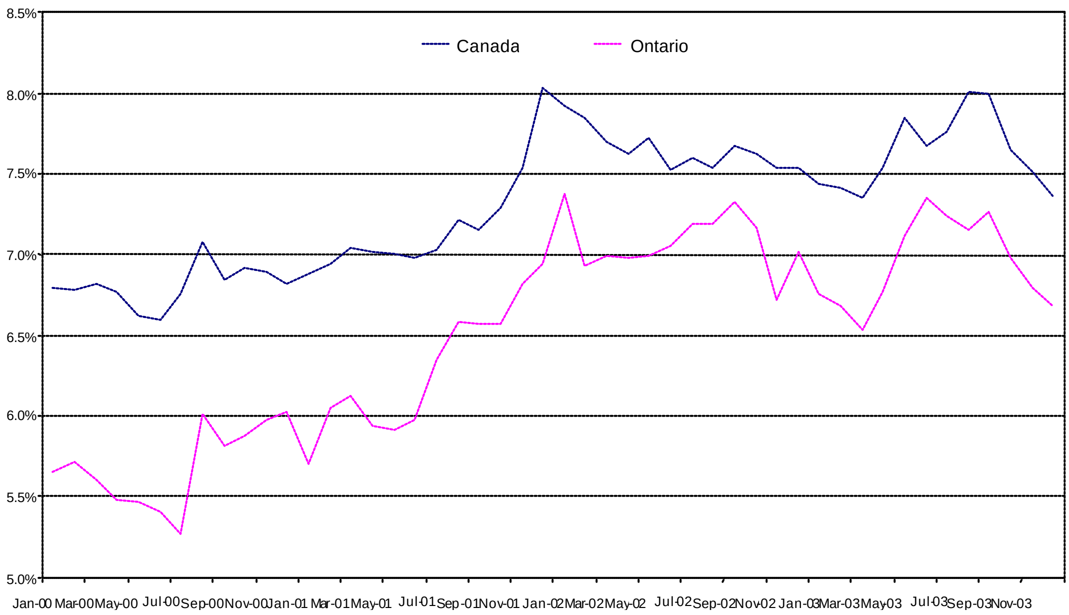


Note: Housing starts are seasonally adjusted at annual rates
Source: Statistics Canada

On the job front, employment increased 2.6% in 2003 over 2002 rates, with 161,000 net new jobs created. The largest job gains in the province in 2003 were in health care and social assistance, management of companies and administrative and personal services. Sectors experiencing declines in 2003 included manufacturing and professional, scientific and technical services.

The overall unemployment rate for Ontario remained below the national average, at 7.0% in 2003 compared to 7.1% a year earlier (see Figure 6: Unemployment Rate, Canada and Ontario, 2000-2003).

Figure 6:
Unemployment Rate, Canada and Ontario, 2000-2003



Note: Data is seasonally adjusted at annual rates
Source: Statistics Canada

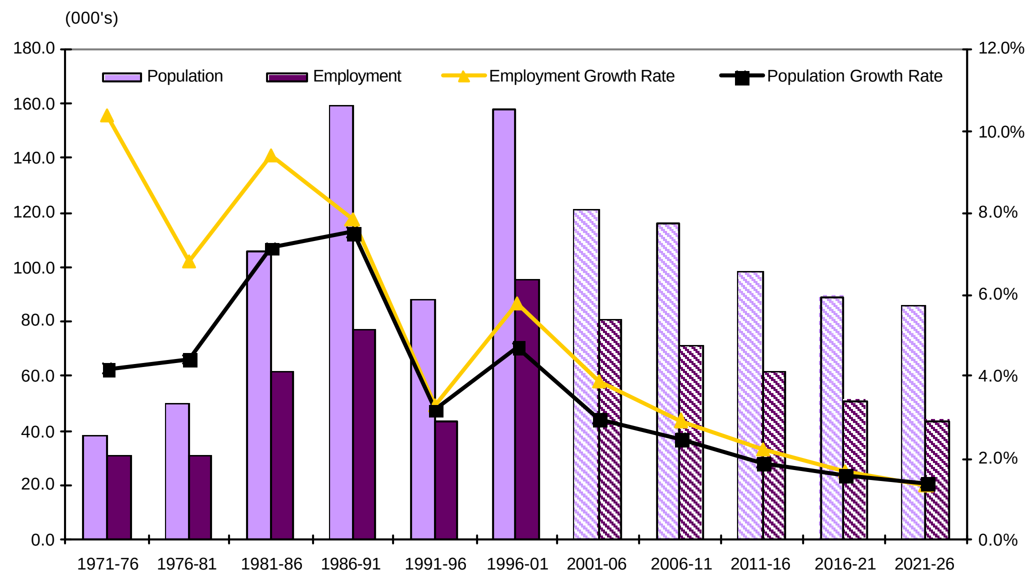
Investment in non-residential construction in Ontario increased 14.1% in 2003 from 2002 levels. Institutional and government projects made up the bulk of this increase accounting for 36.6% of total non-residential construction, while industrial construction increased 9.7%. Commercial activity dipped 2.3% from last year as business decision-makers continued their "wait and see" attitude regarding real estate decisions. The reduction in commercial construction is also attributable to the increased vacancy of commercial office space in the Toronto Census Metropolitan Area (CMA).

York Region Employment Analysis

Employment Growth Has Outpaced Population Growth Since 1971

Employment in York Region has grown at a consistently faster rate than population since its formation in 1971 (see Figure 7: Population and Employment Growth, York Region, 1971-2026).

Figure 7:
Population and Employment Growth, York Region, 1971-2026



Source: York Region Planning & Development Services Department

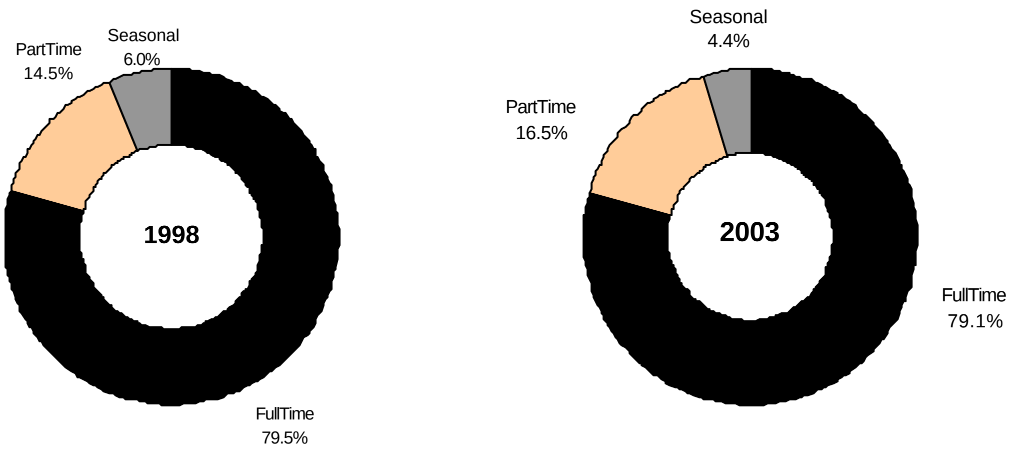
The most recently available data suggest that between 1998 and 2003, employment growth in York Region grew at an annual average rate of 7.1% compared to a population growth rate averaging 5.6% annually. Comparatively, national employment and population grew at annual average rates of 2.3% and 0.9% respectively, between 1998 and 2003.

As of year-end 2003, there were approximately 415,000 jobs in 26,000 businesses in York Region, excluding home and farm-based employment. This is on target with forecasted employment levels. Employment in York Region is anticipated to reach 696,000 by 2026, an increase of 286,000 jobs over 2003 levels. Based on the results of the 2003 Employment Survey, all nine area municipalities recorded positive employment growth rates between 1998 and 2003.

Majority of Jobs in York Region are Full-Time

Employment by job type has remained relatively stable in York Region since 1998. In 2003, 79.1% of jobs were full-time in the survey area, compared with 79.5% in 1998 (see Figure 8: Employment by Type of Worker, 1998 & 2003). The number of part-time jobs increased slightly as a proportion of overall employment during this period, rising from 14.5% to 16.5%.

Figure 8:
Employment by Type of Worker, York Region, 1998 & 2003



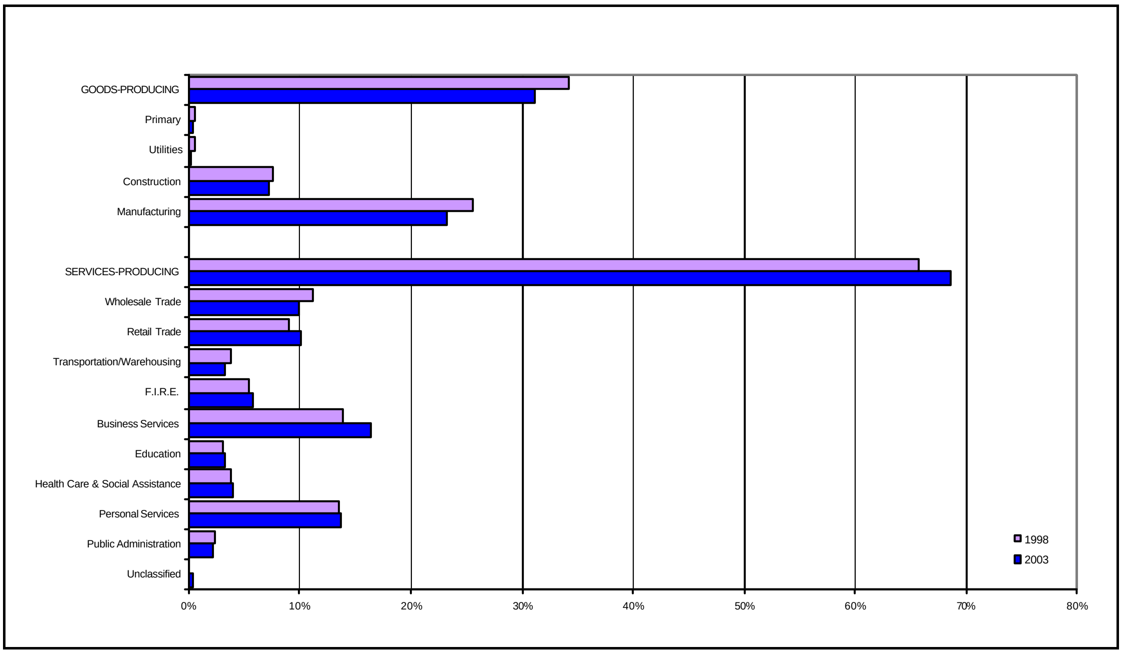
Source: York Region Planning and Development Services Department

The large proportion of full-time employment is encouraging, as full-time jobs are generally considered to be higher paying and more permanent than part-time positions. The rise in part-time employment is likely due in part to the sustained population growth experienced during this period. With approximately 40,000 new residents arriving in York Region each year for the past four years, there has been a corresponding increase in demand for industries that service local residents (i.e., retail, personal services, education and health). With many of these industries relying primarily on part-time employment, it is not surprising that the proportion of part-time jobs increased since 1998.

Proportion of Service-Oriented Jobs Growing in York Region

Employment in York Region is primarily service-oriented, accounting for 68.6% of all jobs in 2003 (see Figure 9: Employment by Industry, York Region, 1998 & 2003). This represents an average annual increase of 5.9% per year since 1998, compared with employment in goods-producing industries, which grew at an average annual rate of 2.7% during the same five-year period. While one possible explanation for the declining proportion of goods-producing jobs in the Region could be increased productivity among existing workers and/or increased industry automation, the growth in service-producing jobs tends to indicate a growing knowledge economy in York Region. This type of economy is defined by a combination of both high technology industries and a highly skilled workforce.

Figure 9 :
Employment by Industry, York Region, 1998 & 2003



Source: York Region Planning and Development Services Department

Among all industry sectors, manufacturing remains the primary employer accounting for 23.3% of employment in York Region. Business services was the second largest industry sector, employing 16.4% of the workforce. The personal services sector rounded out the top three employment sectors, representing 13.7% of jobs in the Region.

On an average annual basis, the fastest growing employment sectors in York Region between 1998 and 2003 were business services (9.6%), retail trade (7.7%), education (7.5%) and the finance, insurance and real estate (FIRE) sector (6.7%). Within the business services sector considerable employment gains were evident in a number of subsectors: scientific research and development services (31.1%), management, scientific and technical consulting services (22.1%), other support services (i.e., firms providing day-to-day support services) (21.8%) and management of companies and enterprises (18.9%). Computer systems design and related services remains the primary employer within the business services sector, accounting for 26.6% of employment.

Businesses by Size

An analysis of businesses within York Region's employment areas indicates that the majority of firms in York Region are small firms (i.e., firms having less than 20 employees). In 2003, 83.4% of firms in York Region were small firms, down slightly since 1998 (see Figure 10). This large number of small firms is indicative of a strong entrepreneurial spirit in the Region.

Figure 10:
Businesses by Size, York Region, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	84.1%	83.4%
Medium (20-99 employees)	13.3%	13.5%
Large (100-499 employees)	2.4%	2.8%
Very Large (500+ employees)	0.2%	0.3%
Total	**100.0%**	**100.0%**

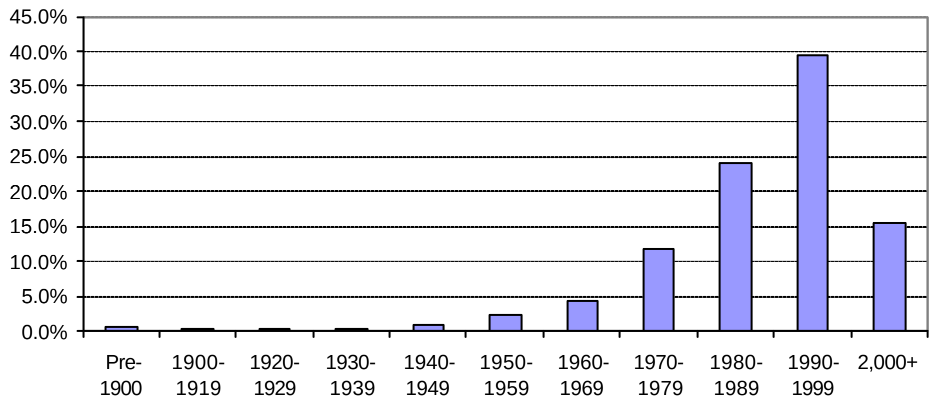
Note: Based on businesses located in the 2003 survey coverage area.
Source: York Region Planning & Development Services Department.

Since 1998, businesses that had the largest rate of increase were in the very large and large categories, which grew 88.9% and 33.7%. The number of public and private-sector firms employing 500 or more employees increased from 27 in 1998 to 51 in 2003. This strong rate of growth reflects both the successful expansion of existing firms and the overall attractiveness of York Region as a place to do business for firms outside the Region.

Most York Region Businesses Established Within Last Two Decades

An analysis of York Region businesses by year established indicates that 78.9% were established since 1980 (see Figure 11: York Region Businesses by Year Established, 2003). This is large proportion of new businesses in York Region is not surprising, given the strong population growth which occurred during this period. Since 1981, York Region's population has grown from 258,000 residents to 867,000 in 2003. With the large increase in population during this period, there has been a corresponding increase in the number of local businesses as they attempt to service the growing population. In addition, the extension of Highway 404 into York Region in the late 1970s and Highway 407 in 1997 have opened up additional lands for development during this period, resulting in increased business growth along these corridors as well.

Figure 11:
York Region Businesses by Year Established, 2003

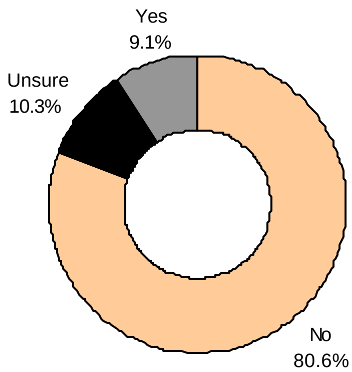


Note: Year established is based on the year a business opened at particular location, rather than when the parent company was established.
Source: York Region Planning and Development Services Department

Moderate Export Activity Among York Region Businesses

Approximately 9.1% of respondents to the York Region Employment survey indicated that they exported goods in 2003, while 80.6% did not (see Figure 12: Percentage of York Region Firms Exporting, 2003). A further 10.3% of respondents were unable to confirm their company's export status when surveyed.

Figure 12:
Percentage of York Region Firms Exporting, 2003



Source: York Region Planning and Development Services Department

This moderate rate of export activity is not surprising, given the high proportion of service-oriented firms in York Region. It should further be noted that this survey fails to take into account components manufactured locally which are then shipped to another supplier further down the supply chain and assembled before being exported as a finished product.

Business Mobility

Business mobility (the rate at which businesses in a given area have closed or relocated outside of the survey area as a percentage of total firms) averaged 7.8% annually in York Region during the 1998 to 2003 period. Mobility rates varied by municipality, with rates among rural municipalities ranging from 3.0% -6.4% and 7.8%-8.9% in urban areas.

Of those firms that closed or moved outside the study area, the majority were in the following sectors: personal services (18.0%), retail trade (16.5%), business services (16. 3%), wholesale trade (14.9%)and manufacturing (14.5%). These closures and/or relocations accounted for the loss of 66,838 jobs and 6,425 businesses in the survey area. However, the addition of new firms and the expansion of others has resulted in a net increase of 64,939 jobs and 2,346 businesses even after these losses are taken into account. Of those new firms that opened within the survey area, 32.3% were in the personal service sector, 27.8% were in business services and 20.6% were in retail trade.

Employment by Business Size

Figure 13 highlights the distribution of York Region employment by business size category between 1998 and 2003.

Figure 13:
Employment by Business Size, York Region, 1998 and 2003

Business Size Category	1998	2003
Small (1-19 employees)	27.6%	23.8%
Medium (20-99 employees)	32.7%	30.6%
Large (100-499 employees)	27.8%	30.6%
Very Large (500+ employees)	11.9%	15.1%
Total	**100.0%**	**100.0%**

Note: Based on businesses located in the 2003 survey coverage area.
Source: York Region Planning & Development Services Department.

As is evident by the table above, employment in York Region was fairly evenly distributed amongst all business size categories. There does appear to be an emerging trend, however, as employment becomes increasingly concentrated among the largest two business size categories. Between 1998 and 2002, large firms have increased their share of regional employment from 27.8% to 30.6%. Similarly, very large firms accounted for 15.1% of employment in York Region in 2003, compared to 11.9% in 1998.

Short Term Economic Outlook

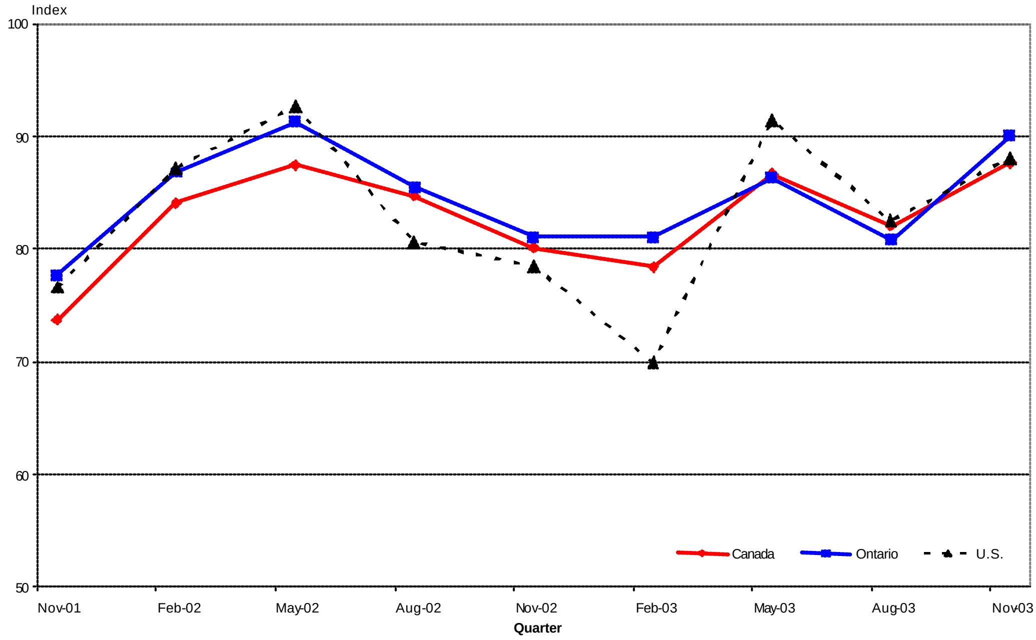
The Canadian economy is set to grow at a moderate pace in 2004, spurred on by continued low interest rates and strengthening US markets. Most experts predict Canadian GDP to grow between 2.6% and 3.3% in 2004, compared to a meagre 1.7% growth rate in 2003.

The strength of the Canadian dollar is expected to weaken demand for Canadian goods south of the border in 2004; however capital spending among businesses is expected to increase 3.1% increase over 2003 levels as Canadian businesses move to take advantage of low interest rates and the increased purchasing power of the loonie when purchasing machinery and equipment from the US. According to Statistics Canada, businesses, governments and institutions have indicated their intent to spend more than $223 billion in 2004 in capital spending across Canada. This increase in capital spending will likely result in an increase in Canadian productivity down the line, as newer, more efficient equipment replaces outdated machinery.

Domestically, demand for Canadian goods is expected to remain strong as consumers continue to take advantage of low interest rates to purchase big ticket items such as homes, automobiles and household furnishings. Consumer spending is forecast to increase 3.0% in 2004, compared to a 3.3% growth rate in 2003. Similarly, Canadian housing starts are forecast to reach 203,900 units in 2004, down slightly from 2003 levels but still showing signs of strength. In Ontario, some 78,000 housing starts are anticipated in 2004.

Across Canada, consumer expectations for the economy in 2004 are at their highest level since May 2002 (see Figure 14: Consumer Expectations, Canada, Ontario & USA, 2001-2003).

Figure 14:
Consumer Expectations, Canada, Ontario & USA, 2001-2003



Source: Decima-Investors Group (Canada and Ontario); University of Michigan (U.S.)

The Decima-Investors Group Index of Canadian Consumer Expectations rose to 87.7 in November, a substantial increase from a year earlier. This increase in consumer sentiment is likely due in part to an easing of geopolitical tensions worldwide and the sustained job growth across the country, which has in turn fuelled domestic demand.

Locally, hiring intentions among York Region businesses declined in 2003 over a year ago with 17.4% indicating that they would be hiring additional staff (see Figure 15: York Region Business Hiring Intentions, 2002 & 2003). In comparison, 27.3% of respondents in 2002 indicated that they intended to hire shortly. The large degree of uncertainty in 2003 was likely a result of several economic setbacks felt across the Canadian economy, as discussed previously.

Figure 15:
York Region Business Hiring Intentions, 2002 & 2003

"Are You Hiring Within the Next Three Months?"	2002	2003
Yes	27.3%	17.4%
No	65.9%	49.7%
Unsure	6.8%	33.0%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department

Going forward into 2004, the business outlook appears positive for York Region. Many of the economic setbacks experienced in 2003 were unique in nature and are unlikely to occur in the near future. In addition, a number of developments are currently under construction across the Region, which will provide local employment opportunities both in the construction phase and upon completion. A large stock of new residential housing units under construction and scheduled for occupancy in 2004 will also increase the demand for population-based employment such as health care, education, retail and personal services in the coming months.

Conclusions

The strength of the Canadian and provincial economies in recent years has been a major factor behind the continued job growth in 2003. In turn, this job growth has sustained both consumer and business confidence during a year of many economic challenges.

Employment growth in York Region was on target with projections and has outpaced both national and provincial averages over the past five years. Between 1998 and 2003, there were an estimated 415,000 jobs in York Region, representing an average annual employment growth rate of 7.1%. Comparatively, national and provincial employment grew at annual average rates of 2.3% and 2.7%.

While the rate of employment growth varied among York Region's local municipalities, some general trends were evident regarding the York Region economy. Manufacturing remained the primary employer in York Region, employing 23.3% of all jobs in surveyed areas in 2003. However, strong employment growth was evident in a number of sectors with the business services, retail trade, education and F.I.R.E. sectors each recording growth rates in excess of 30.0% since 1998. York Region's continued employment diversification across a variety of industry sectors contributes to an already broad-based economy, insulating the Region from sudden shifts in the business cycle.

York Region has succeeded in recent years in attracting a number of large corporations to the area while at the same time encouraging the growth of existing firms. As of 2003, there were an estimated 26,000 businesses in York Region, up from 21,000 in 1998. While small firms continue to dominate the business landscape with 83.4% of firms having less than 20 workers, since 1998 the proportion of large businesses (100-499 employees) and very large firms (500+ employees) increased 33.7% and 88.9%, respectively. York Region had 51 public and private-sector firms in the survey area employing 500 or more employees in 2003 and 536 firms with 100-499 employees each.

With improved consumer confidence and healthy growth rates forecast at the national level, the overall outlook for the York Region economy appears positive heading into 2004. Among new firms, the outlook for employment growth in the near future continues to look promising as well, with a number of commercial and industrial buildings nearing completion. Additionally, new residential housing scheduled for occupancy in 2004 will ensure future employment growth in population-based employment sectors as well.

AREA MUNICIPAL PROFILES

Aurora

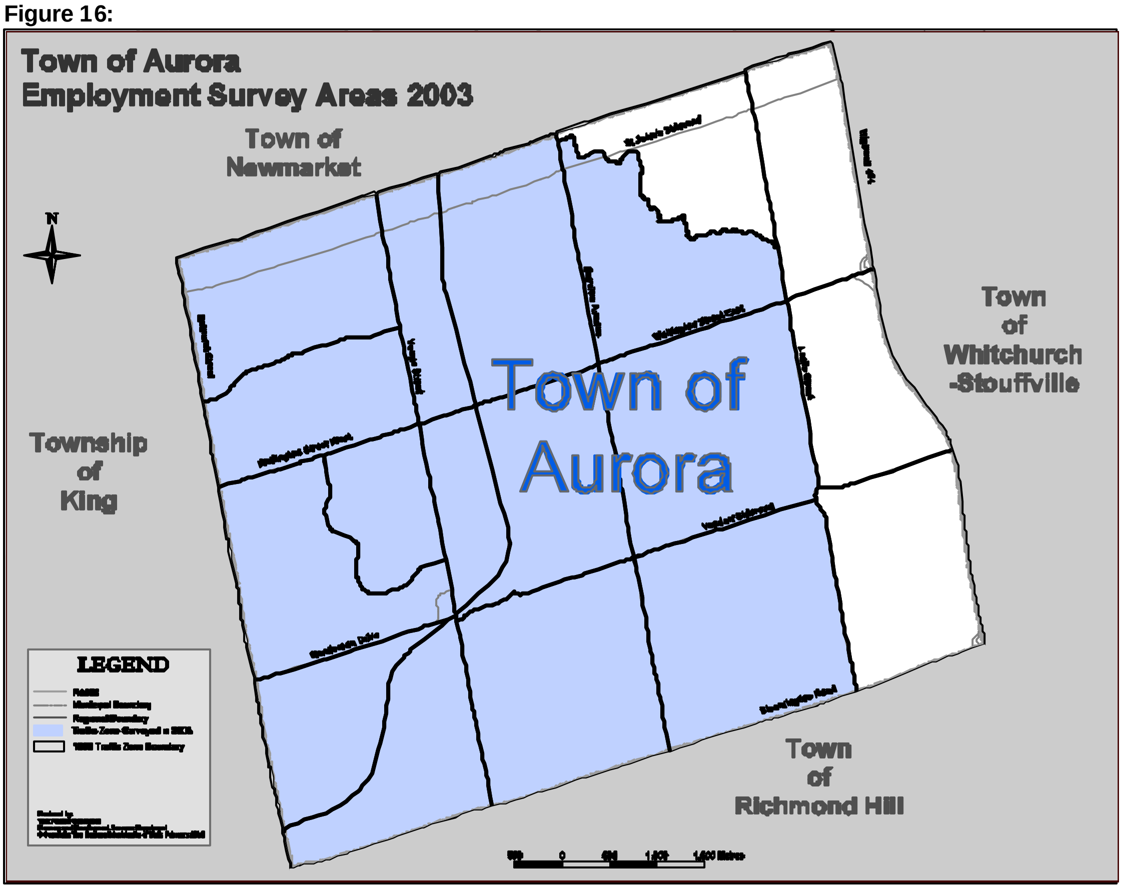
Aurora Highlights:

- Jobs in survey area in 2003: 15,211 — Average annual employment growth: 6.9%
- Businesses in survey area in 2003: 969 — Average annual business growth: 2.5%
- Major employment sector in 2003: Manufacturing, 24.3%
- Fastest-growing employment sector 1998 -2003: Wholesale Trade, 62.5%

Employment Overview

The 2003 employment survey area in Aurora included all non-residential traffic zones (see Figure 16: Town of Aurora Employment Survey Areas). In 1998, these areas accounted for an estimated 10,862 jobs. As of 2003, there were approximately 15,211 jobs in these areas, resulting in an average annual employment growth rate of 6.9% since 1998.

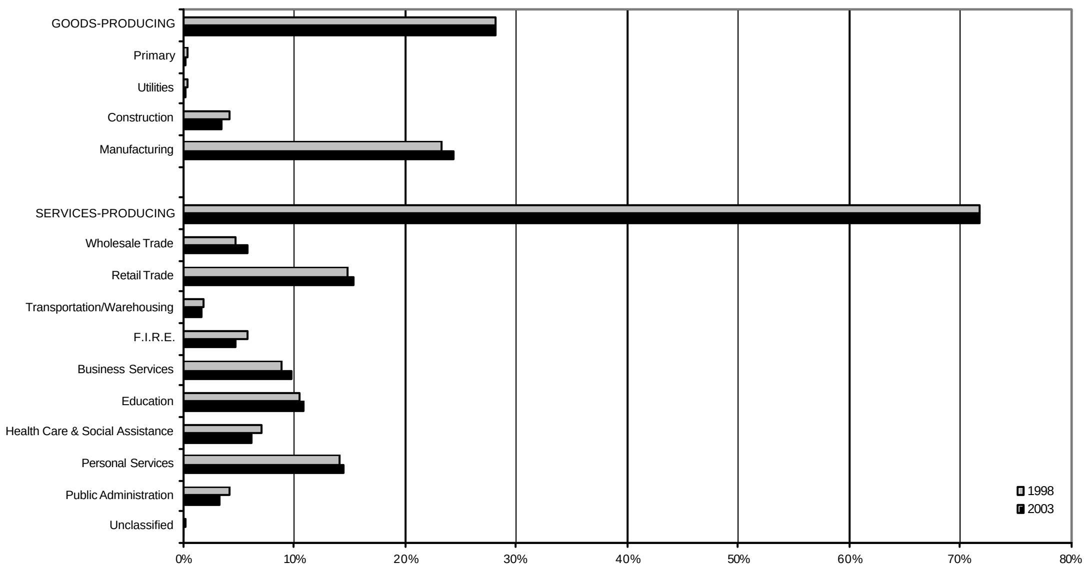
Figure 16:



Employment by Sector

Employment in Aurora is predominantly service-based, accounting for 71.7% of total employment in 2003 (see Figure 17: Employment by Industry, Aurora, 1998 & 2003). Among services-producing industries, retail trade and personal services dominate, employing 15.4% and 14.4% of the total workforce, respectively.

Figure 17:
Employment by Industry, Aurora, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

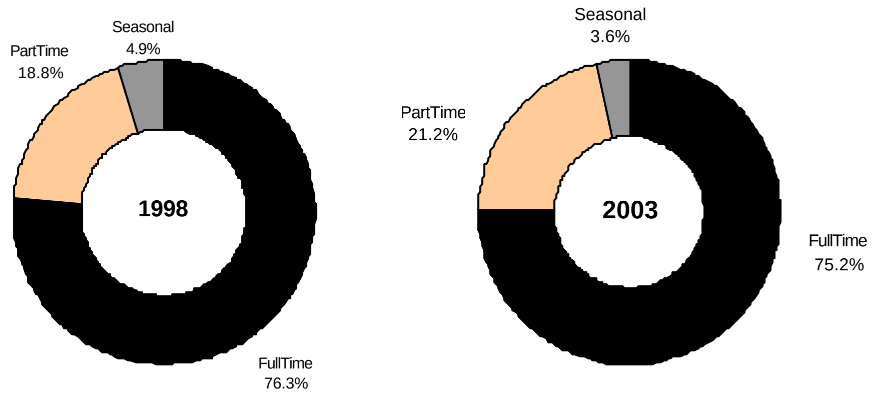
Manufacturing is the primary employer in Aurora, accounting for 24.3% of jobs in Aurora. Within the manufacturing sector, transportation equipment manufacturing, printing and related support activities and machinery manufacturing are the dominant subsectors, accounting for 24.0%, 18.3%, and 9.4% of manufacturing employment, respectively. Growth occurred evenly across both goods-producing and service-producing industries in the survey area since 1998, with a corresponding increase of 35.3% and 34.5%.

Among all employment sectors, the wholesale trade sector experienced the largest employment increase in Aurora since 1998, rising 62.5% between 1998 and 2003. This increase is the result of 1,077 new jobs in this sector during the five-year period. Business services and manufacturing were the second and third-fastest growing industries in Aurora, increasing 47.4% and 41.1%. The primary sector witnessed an 8.6% decrease in employment since 1998 off of a very small base. This decline resulted in a loss of 3 jobs.

Employment by Type of Worker

A slight decline in the percentage of full-time employment was evident in Aurora between 1998 and 2003, dipping from 76.3% in 1998 to 75.2% in 2003 (see Figure 18: Employment by Type of Worker, Aurora, 1998 & 2002). In contrast, the proportion of part-time jobs in Aurora increased during this period. As of 2003, part-time employment accounted for 21.2% of total employment, up from 18.8% five years prior. This increase in part-time employment is likely attributable to the increase in the number of retail and personal service-based employment, which typically employ a larger proportion of part-time workers than industrial or commercial firms.

Figure 18:
Employment by Type of Worker, Aurora, 1998 & 2003



Source: York Region Planning & Development Services Department

Business Overview

The number of businesses in the surveyed areas increased 12.4% since 1998, or 2.5% on an average annual basis.

Business Mobility

Annual business mobility was relatively low in Aurora, with 4.7% of businesses either moving or closing each year since 1998. Of those that closed or moved, most were in the following sectors: personal services (23.9%), retail trade (21.0%), business services (17.1%) and manufacturing (9.8%). These closures and/or relocations resulted in the loss of 1,112 jobs in the survey areas since 1998. Notwithstanding these factors, the areas surveyed experienced a net gain in both the number of businesses and employees during the survey period. In total, 3,917 net new jobs and 103 net new firms were added to the area since 1998. Retail-based businesses accounted for 27.2% of new businesses to the area, while personal services comprised 20.4%.

Businesses by Size

Small firms made up the majority of Aurora's businesses in 2003, accounting for 84.5% of total businesses (see Figure 19). This figure is down slightly from 1998 levels due to the addition and/or growth of medium and large-sized firms in the area.

Figure 19:
Businesses by Size, Aurora, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	86.2%	84.5%
Medium (20-99 employees)	11.5%	12.3%
Large (100-499 employees)	2.3%	3.0%
Very Large (500+ employees)	0.0%	0.2%
Total	**100.0%**	**100.0%**

Source: York Region Planning and Development Services Department

The proportion of medium and large-sized businesses in Aurora increased 20.2% and 45.0%, respectively, between 1998 and 2003. Medium-sized businesses made up 12.3% of all businesses in Aurora as of 2003.

Major Employers

Major employers in Aurora include:

- Quebecor World;
- Sinclair Technologies Inc.;
- York Region Catholic School Board;
- Canada Law Book;
- Reebok Canada; and
- Magna International (Plydex, Uni-Motion Gear, Camslide II, Corporate Campus).

Development Activity

Total non-residential building permit values in Aurora were $19.1 million in 2003, down 25.6% from 2002 levels. The decline was felt in both industrial permit values, which fell 67.2%, and institutional building permits, which dipped 30.7%. Conversely, commercial building permits in Aurora increased 24.2% from 2002 levels.

Figure 20 highlights some of the larger businesses that opened in Aurora in 2003:

Figure 20:
Recently Opened Businesses, Aurora, 2003

Business Name	Land Use	Building Size
Home Depot	Commercial	9,155 sq.m. (98,544 sq.ft.)
Oriental Diner	Commercial	251 sq.m. (2,700 sq.ft.)
Cedarwood Construction	Industrial	135 sq.m. (1,450 sq.ft.)

Source: Town of Aurora

A number of businesses were under construction in Aurora in 2003. Figure 21 summarizes the larger firms that were under construction over the past year.

Figure 21:
Businesses Under Construction, Aurora, 2003

Business Name	Land Use	Building Size
Sunrise Developments Inc. (Retirement Home)	Institutional	7,500 sq.m. (80,730 sq.ft.)
Home Depot	Commercial	9,155 sq.m. (98,544 sq.ft.)

Source: Town of Aurora

East Gwillimbury

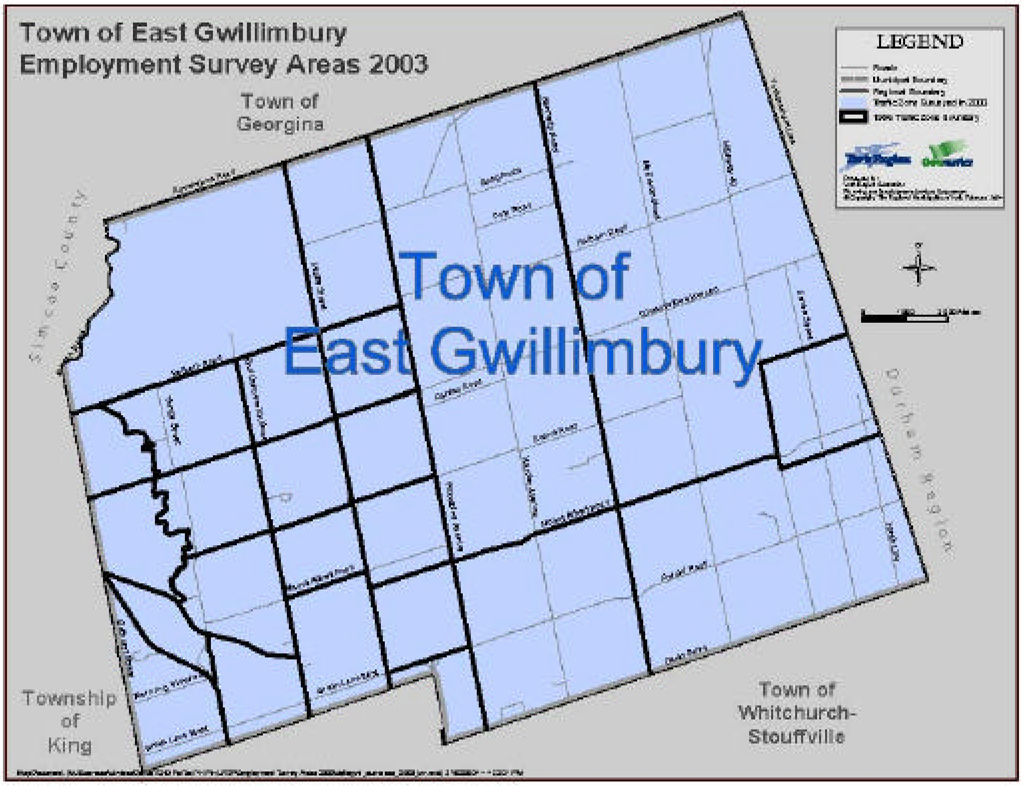
East Gwillimbury Highlights:

- Jobs in survey area in 2003: 4,110 — Average annual employment growth: 9.2%
- Businesses in survey area in 2003: 387 — Average annu al business growth: 3.0%
- Major employment sector in 2003: Personal Services, 27.4%
- Fastest-growing employment sector 1998 -2003: Personal Services, 118.4%

Employment Overview

Employment in East Gwillimbury increased 45.8% in 2003 over 1998 rates, or 9.2% on an average annual basis (see Figure 22: Town of East Gwillimbury Employment Survey Areas). Much of this increase in employment can be attributed to the recent development of several retail stores, restaurants and services within the Yonge Street Commercial Centre at the southwest portion of Town.

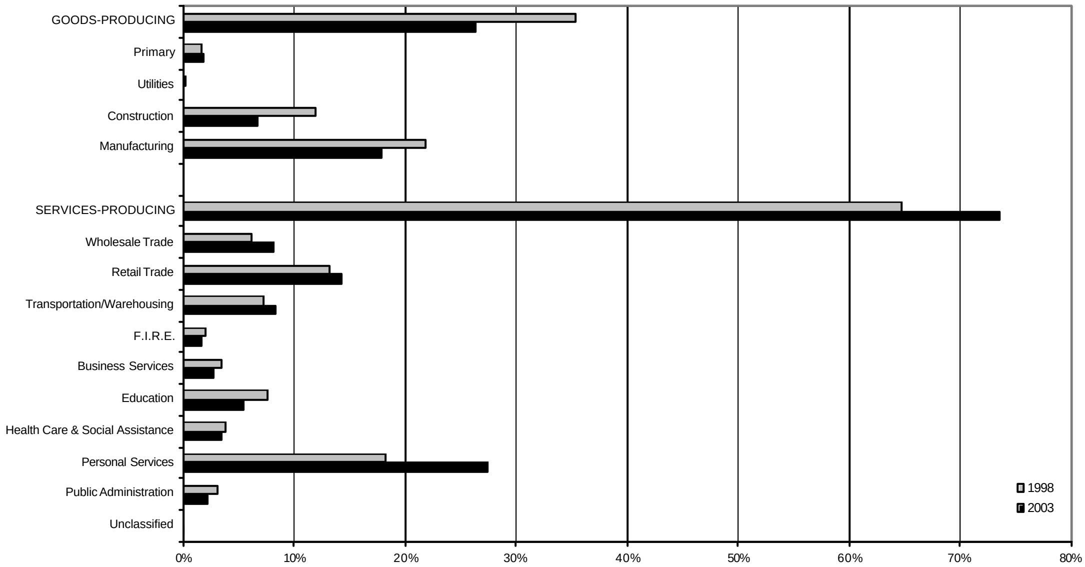
Figure 22:



Employment by Sector

Service-based employment dominates the East Gwillimbury employment profile, accounting for 73.6% of all jobs (see Figure 23: Employment by Industry, East Gwillimbury, 1998 & 2003). Dominant service-producing sectors include personal services and retail trade, which account for 27.4% and 14.3% of total employment, respectively.

Figure 23:
Employment by Industry, East Gwillimbury, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

Manufacturing is the primary employer among goods-producing industries, comprising 17.9% of jobs. Within this sector, office furniture manufacturing and non-metallic mineral product manufacturing are the dominant subsectors, accounting for 50.2% and 19.7% of manufacturing employment, respectively. East Gwillimbury has experienced rapid employment growth in the service-producing sector since 1998, increasing from 64.7% to 75.4% in 2003.

Across all industry sectors, the fastest-growing industry in East Gwillimbury since 1998 has been the personal services sector, which witnessed a 118.4% increase in employment since 1998 due in part to the addition of 20 new firms. Wholesale trade and transportation/warehousing were the second and third-fastest growing industries, respectively, increasing 95.9% and 70.3% during the same period. Construction employment in East Gwillimbury contracted 18.0% between 1998 and 2003 for a loss of 65 jobs.

Employment by Community

The following analysis outlines employment trends in the individual communities located within East Gwillimbury:

Holland Landing

Employment and businesses in Holland Landing increased 4.7% and 4.3%, respectively, between 1998 and 2003. At year-end 2003, an estimated 1,102 people were employed in 98 establishments in Holland Landing.

The transportation, warehousing and utilities sector was the fastest-growing employment sector within the past five years in Holland Landing, increasing by 50.0%. The personal services sector followed closely behind, growing 42.9% during the same period.

Manufacturing remains the primary employer in Holland Landing, accounting for 47.9% of employment. A recent employment increase in the personal services sector resulted in personal services edging out education as the second largest employment sector in Holland Landing in 2003, comprising 10.9% of employment.

Mount Albert

Employment increased 50.8% in Mount Albert between 1998 and 2003. There are now 386 people employed in 54 businesses in this community, up from 256 people in 42 businesses five years ago. Retail trade was the fastest growing industry sector in Mount Albert between 1998 and 2003. Between 1998 and 2002, this sector grew 130.2%, adding 82 jobs. Personal services accounted for the second-largest increase in employment, adding 40 jobs during the same period. Retail was the largest employment sector in Mount Albert in 2003, accounting for 37.6% of all jobs in the community.

Other Areas

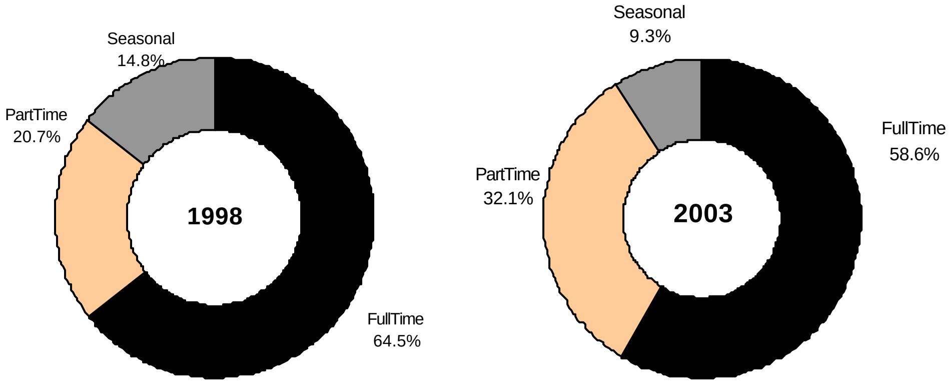
Employment has edged downward within the Queensville community since 1998, despite a 9.1% increase in the number of businesses during the same period. Queensville had 111 people working in 24 businesses in 2003, compared to 128 employees in 22 businesses in 1998.

Employment in Sharon dropped 23.7% between 1998 and 2003, following the closure of six businesses. As of 2003, there were approximately 255 people employed in 28 firms, down from 334 people working in 34 firms in 1998.

Employment by Type of Worker

Part-time employment in East Gwillimbury rose 126.6% between 1998 and 2003, increasing its share of total employment to 32.1% (see Figure 24: Employment Distribution by Class of Worker, East Gwillimbury, 1998 & 2003). Full-time employment rose 32.5% during the same period, but due to the strong growth in part-time employment, saw its share of total employment decline slightly since 1998.

Figure 24:
Employment Distribution by Class of Worker, East Gwillimbury, 1998 & 2003



Source: York Region Planning & Development Services Department

Business Overview

The number of businesses in East Gwillimbury increased by 14.8% between 1998 and 2003, or 3.0% on an average annual basis. There were 387 businesses in the Town in 2003, up from 337 in 1998.

Business Mobility

Businesses in East Gwillimbury were quite stable between 1998 and 2003, with an average annual mobility rate of only 4.7% compared to a Regional average of 7.8%. The personal services sector was the most mobile during this period, accounting for 25.1% of all firms that moved outside of the survey area or closed since 1998. Manufacturing firms accounted for the second highest mobility rate among industry sectors in East Gwillimbury, comprising 20.4% of firms moving or closing in the area.

The closure and/or relocation of businesses in the survey area resulted in the loss of some 279 jobs. However, the arrival of 50 new firms during the 1998-2003 period has more than made up for these jobs, resulting in a net employment gain in East Gwillimbury of 1,292 jobs even after these losses are accounted for.

Businesses by Size

Figure 25 outlines the distribution of businesses in East Gwillimbury by the number of employees. The number of small businesses increased 11.4% since 1998 and accounted for 88.6% of firms in 2003. Medium firms, in comparison, gained a larger share of the total business base, rising 40.7% to 9.8% in 2003.

Figure 25:
Businesses by Size, East Gwillimbury, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	91.1%	88.4%
Medium (20-99 employees)	8.0%	9.8%
Large (100-499 employees)	0.9%	1.8%
Very Large (500+ employees)	0.0%	0.0%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department

Major Employers

Major employers in East Gwillimbury include:

- Inscape;
- Architectural Precast Systems Inc.;
- Mount Albert IGA;
- Town of East Gwillimbury; and
- GO Transit.

Development Activity

Despite strong growth in both industrial and institutional building permits since 2002, a 29.1% decline in commercial building permit values in 2003 resulted in an overall drop in non-residential building permit values in 2003 of 2.8%. Non-residential permits totalled $16.4 million in 2003.

Figures 26 and 27 provide an overview of some of the larger developments that either opened or were under construction in East Gwillimbury in 2003.

Figure 26:
Recently Opened Businesses, East Gwillimbury, 2003

Business Name	Land Use	Building Size
Linens 'n' Things	Commercial	2,596 sq.m. (27,947 sq.ft.)
Michaels Crafts	Commercial	2,234 sq.m. (23,940 sq.ft.)
Queensville Antique Mall on Woodbine	Commercial	1,486 sq.m. (16,000 sq.ft.)
Pets Mart	Commercial	1,394 sq.m. (15,000 sq.ft.)

Source: Town of East Gwillimbury

Figure 27:
Businesses Under Construction, East Gwillimbury, 2003

Business Name	Land Use	Building Size
Milestone's	Commercial	614 s q.m. (6,604 sq.ft.)
Imperial Oil (Esso)	Commercial	585 sq.m. (6,296 sq.ft.)
Kelsey's	Commercial	519 sq.m. (5,591 sq.ft.)
TD Bank	Commercial	430 sq.m. (4,715 sq.ft.)

Source: Town of East Gwillimbury

Georgina

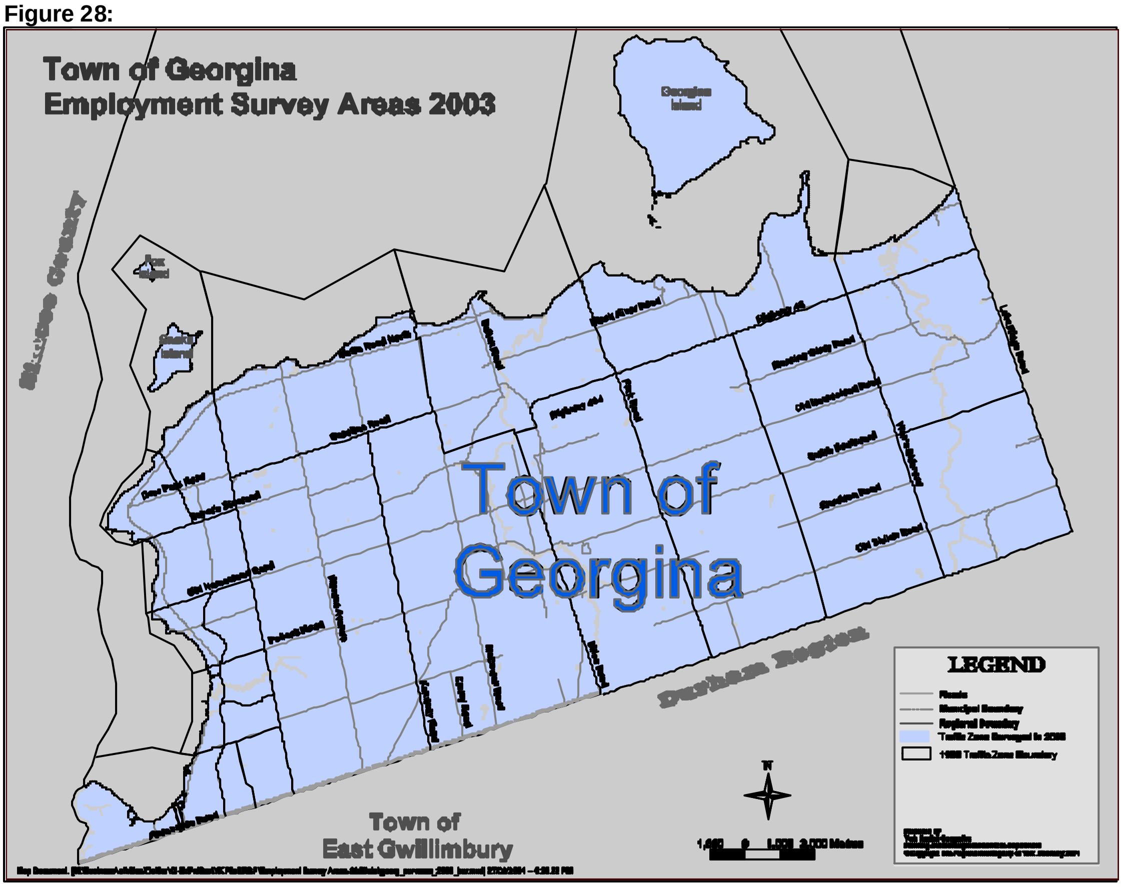
Georgina Highlights:

- Jobs in survey area in 2003: 6,358 — Average annual employment growth: 5.5%
- Businesses in survey area in 2003: 713 — Average annual business growth: 2.1%
- Major employment sector in 2003: Personal services, 27.8%
- Fastest-growing employment sector 1998-2003: Education, 72.5%

Employment Overview

The 2003 employment survey area for Georgina is provided in Figure 28: Town of Georgina Employment Survey Areas. In 2003, this area accounted for 6,358 jobs, representing an increase of 27.4% between 1998 and 2003, or 5.5% on an average annual basis.

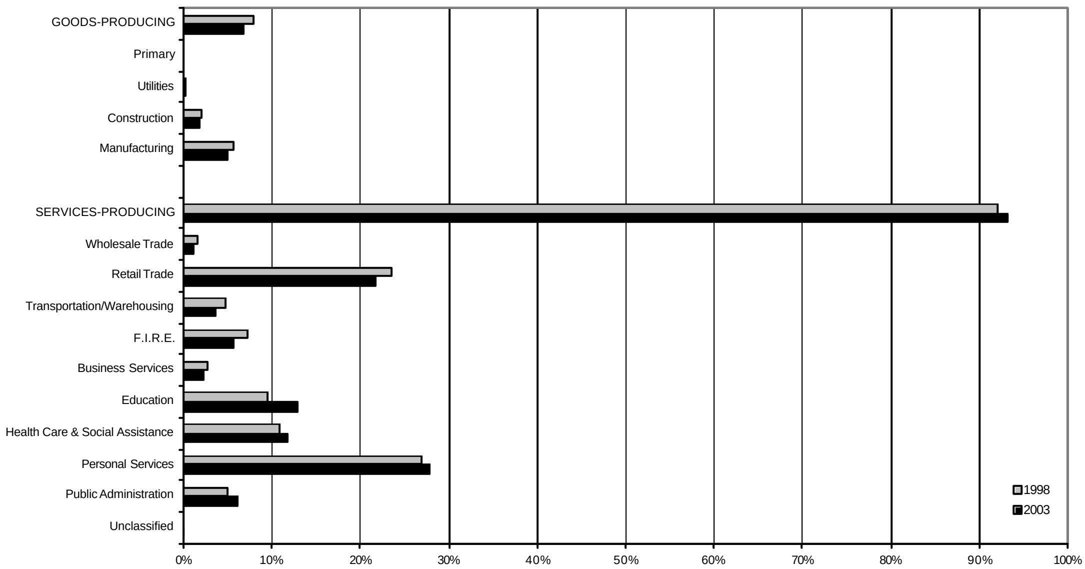
Figure 28:



Employment by Sector

Georgina's economy is predominantly service-producing, reflecting the large presence of tourism and population-based employment in this area. Service producing jobs accounted for 93.2% of all jobs in 2003 (see Figure 29: Employment by Industry, Georgina, 1998 & 2003). The majority of jobs within the service sector are in personal services and retail trade, accounting for 27.8% and 21.7% of all jobs, respectively.

Figure 29:
Employment by Industry, Georgina, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

A breakdown of subsectors within the personal services industry sector sheds further light on the service-oriented nature of Georgina's economy as a tourist destination. Food services and drinking places made up 43.1% of employment in the personal services sector, followed by accommodation services at 17.0%.

Among goods producing industries, manufacturing was the primary employer with 4.9% of Georgina's employment in 2003.

Education and health care and social assistance sectors were the fastest growing employment sectors in Georgina since 1998, rising 72.5% and 40.0%, respectively. On the downside, employment losses were felt in the following sectors: utilities (-46.2%, for a loss of 6 jobs), wholesale trade (-14.1%, or 12 jobs) and transportation/warehousing (-2.9%, or 7 jobs).

Employment by Community

The following analysis outlines recent employment trends occurring within the major community centres of Georgina:

Keswick

The community of Keswick experienced strong employment growth between 1998 and 2003, rising 54.5%, or 10.9% on an average annual basis. During this five-year period, 64 new businesses opened for a total of 300 establishments employing 2,922 people in this community. The personal services sector accounted for the majority of new establishments opening in Keswick, with 23 net new businesses opening since 1998.

Much of the employment in Keswick is in traditional population-related employment sectors, such as retail (26.9%), personal services (24.7%) and education (18.1%).

Pefferlaw

Employment in Pefferlaw declined slightly since 1998, decreasing 4.2%. As of 2003, approximately 520 persons were employed at 62 separate firms in Pefferlaw. Most of the jobs lost were in the manufacturing and construction sectors, due in part to the closure of three businesses and the downsizing of others.

Personal services and manufacturing were the dominant employment sectors in Pefferlaw, employing 38.1% and 30.4% of the workforce, respectively.

Sutton

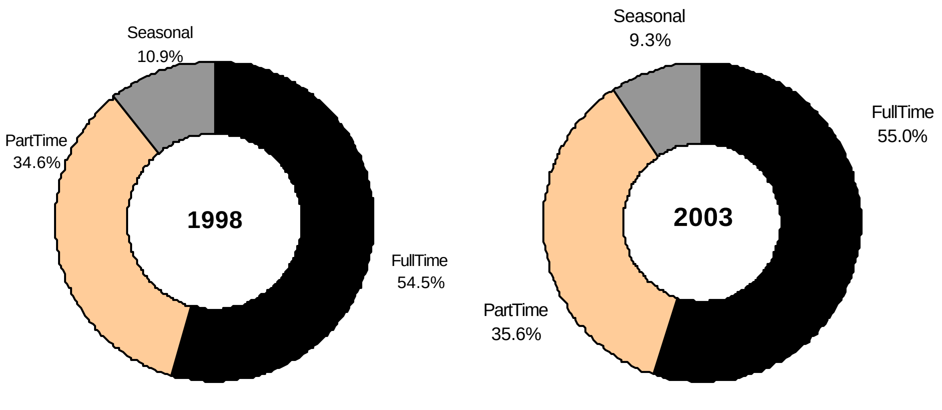
Employment in Sutton increased 14.4% between 1998 and 2002, or 2.8% on an average annual basis. As of year-end 2003, 181 businesses in Sutton employed some 1,638 persons.

The Sutton economy is heavily service-oriented, with service-producing sectors employing 96.9% of employment. Personal services accounted for 35.2% of Sutton's employment in 2003, with retail was close behind at 22.8%.

Employment by Type of Worker

The distribution of jobs by type of worker remained relatively unchanged in Georgina between 1998 and 2003. Full-time employment now comprises 55.0% of all employment in the survey areas, down slightly from 54.5% in 1998 (see Figure 30: Employment Distribution by Type of Worker, Georgina, 1998 & 2002).

Figure 30:
Employment Distribution by Type of Worker, Georgina, 1998 & 2003



Source: York Region Planning & Development Services Department

Part-time employment increased at a slightly higher rate since 1998, rising from 34.6% to 35.6% in 2003. This relatively high rate of part-time employment is not surprising, given the large number of retail and personal service jobs in Georgina.

Business Overview

The number of businesses in Georgina increased 10.5% since 1998, or 2.1% at an average annual rate. At year-end 2003, there were an estimated 536 businesses in Georgina.

Business Mobility

The rate of business mobility in Georgina between 1998 and 2003 was the lowest in York Region, with 3.0% of businesses closing or relocating outside the survey area in each of the last five years. The closure and/or relocation of 97 firms resulted in the loss of 338 jobs in the area since 1998, however the addition of 68 new firms and 1,366 employees more than offset these losses. Of those firms that closed or moved in Georgina since 1998, 35.1% were in the personal services sector, while 34.0% were in retail. Among new firms, retail trade accounted for 29.0% of new firms, while education and personal services also witnessed strong increases, increasing 22.6% and 19.4%, respectively.

Businesses by Size

While the majority of firms in Georgina employed less than 20 employees in 2003, the proportion of medium and large-sized firms increased 58.5% and 66.7% between 1998 and 2003. As a result of this growth medium and large-sized firms accounted for 9.1% and 1.4% of businesses in Georgina in 2003 (see Figure 31).

Figure 31:
Percent of Businesses by Size, Georgina, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	92.7%	89.5%
Medium (20-99 employees)	6.4%	9.1%
Large (100-499 employees)	0.9%	1.4%
Very Large (500+ employees)	0.0%	0.0%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department

Although the total number of businesses in the survey area is relatively small, the increasing share of medium and large-sized businesses indicates the presence of a healthy economy, as existing businesses expand their workforce and larger new businesses are attracted to the area.

Major Employers

Major employers in the area include:

- The Briars Resort;
- Zehrs Market;
- The Town of Georgina
- Georgina Association for Community Living;
- I.G.A.; and
- C.P.I Plastics.

Development Activity

Non-residential building permits in Georgina increased 112.6% between 2002 and 2003. As of year-end 2003, $4.4 million worth of industrial, commercial and institutional building permits were issued. Industrial permits accounted for 53.3% of non-residential permits, while commercial and institutional permits comprised 29.9% and 16.8%.

Figures 32 and 33 provide a summary of developments that either recently opened or were under construction in Georgina in 2003.

Figure 32:
Recently Opened Businesses, Georgina, 2003

Business Name	Land Use	Building Size
Price Chopper	Commercial	1,301 sq.m. (14,000 sq.ft.)
TGF Bumper & Fender Inc.	Industrial	214 sq.m. (2,300 sq.ft.)
It's a Great Place Inc.	Commercial	186 sq.m. (2,000 sq.ft.)
Pet Valu	Commercial	186 sq.m. (2,000 sq.ft.)

Source: Town of Georgina

Figure 33:
Businesses Under Construction, Georgina, 2003

Business Name	Land Use	Building Size
n.a. (warehouse)	Industrial	557 sq.m. (6,000 sq.ft.)
Shell Canada	Commercial	121 sq.m. (1,304 sq.ft.)
Laferme Black River Game Inc.	Industrial	70 sq.m. (748 sq.ft.)

Source: Town of Georgina

King

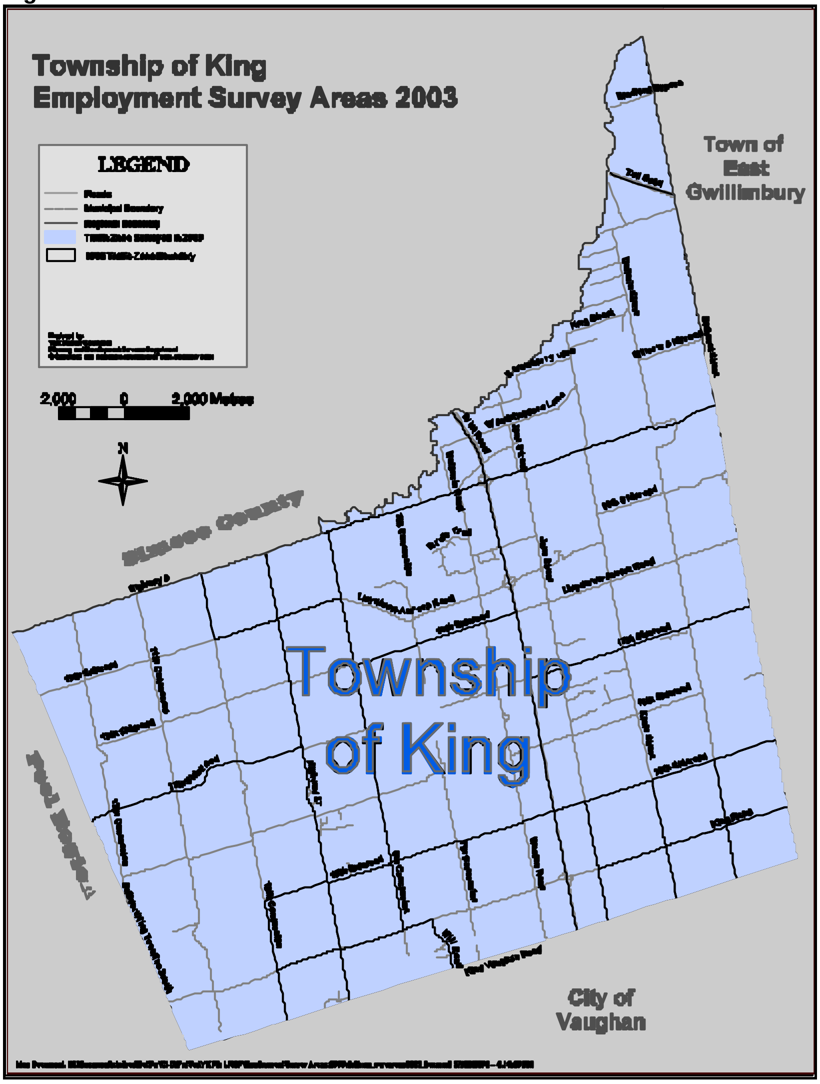
King Highlights:

- Jobs in survey area in 2003: 5,057 — Average annual employment growth: 6.4%
- Businesses in survey area in 2003: 394 — Average annual business growth: 6.1%
- Major employment sector in 2003: Personal Services, 20.1%
- Fastest-growing employment sector 1998-2003: Business Services, 99.1%

Employment Overview

In 2003, businesses throughout King Township were included in the employment survey, including the communities of King City, Nobleton and Schomberg (see Figure 34: Township of King Employment Survey Area). In 1998, these areas accounted for 3,834 jobs; by 2003, the number of jobs had grown 31.9% or 6.4% at an average annual rate. As of year-end 2003, there were an estimated 5,057 jobs in King Township.

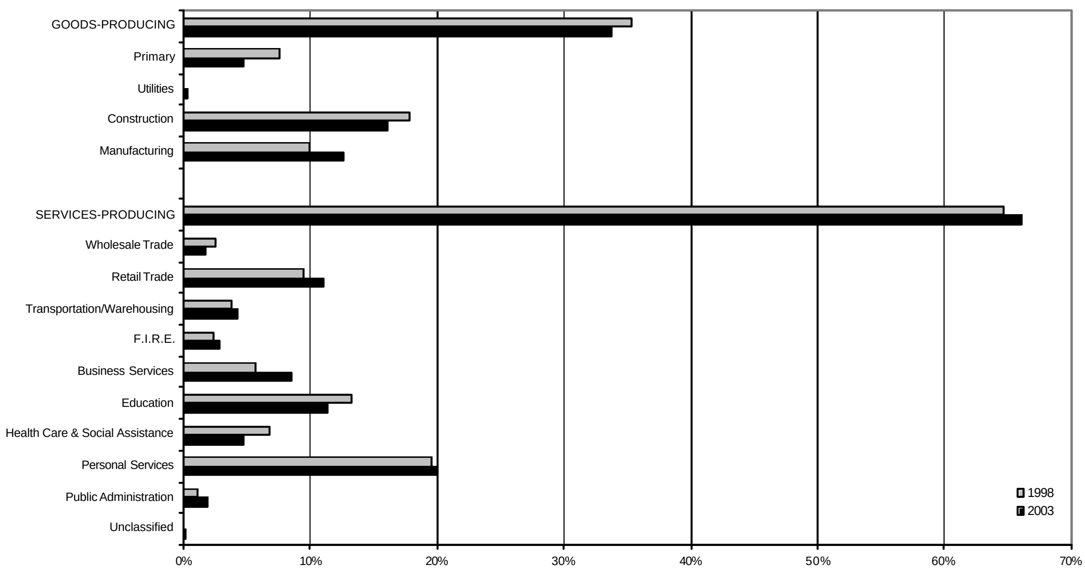
Figure 34:



Employment by Sector

Employment in King Township was predominantly service-oriented, accounting for 66.1% of employment in 2003 (see Figure 35: Employment by Industry, King, 1998 & 2002). Dominant service-producing industries in King Township include personal services, education and retail.

Figure 35:
Employment by Industry, King, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

Construction was the dominant employer among goods-producing industries in 2003, accounting for 16.1% of employment, down slightly from 1998. The arrival of nine manufacturing firms since 1998, coupled with an expanded labour force among existing manufacturers, resulted in an increase in manufacturing's share of employment in King from 9.9% to 12.6% in 2003.

Across all industry sectors, personal services was the dominant sector in King Township, accounting for 20.1% of employment. Within this sector, amusement, gambling and recreation industries was the largest subsector, accounting for 47.0% of personal services employment. King's five golf courses account for the majority of employment within this subsector.

Business services, manufacturing and retail trade were the fastest growing sectors in King, with corresponding growth rates of 99.1%, 68.8% and 52.9% since 1998. In contrast, employment losses were felt in the primary, wholesale trade and health care and social assistance sectors, which dropped 17.1%, 13.1% and 9.9%, respectively.

Employment by Community

King City

King City employment rose 5.2% annually since 1998, while the number of businesses grew 11.3% during the same period. As of 2003, there were 1,227 people working in 75 firms in King City, up from 973 people working in 48 firms in 1998. Construction is the primary employer in King City, employing 47.0% of the workforce. Education and personal services were the second and third most dominant employment sectors, with 10.7% and 8.3% of workers, respectively.

The largest growth sector in King City was in the Public Administration sector, which is attributable to the relocation of the King Township Municipal Offices to King City since the last survey was completed in 1998. As a result, the growth of this sector should be viewed as more of a transfer of employment from one area to another rather than a net gain. Education, personal services and business services also experienced substantial increases between 1998 and 2003, with corresponding growth rates of 162.0%, 126.7% and 111.1%.

Nobleton

Employment in Nobleton increased 2.9% at an average annual rate since 1998, while business growth averaged 3.8%. Nobleton employed 486 people in 93 firms in 2003, compared to 424 employees in 78 firms five years ago. Personal services and retail trade were the primary and secondary employment sectors in Nobleton as of 2003, accounting for 27.0% and 22.8% of employment.

The transportation/warehousing sector experienced the largest growth rate in Nobleton since 1998, albeit from a very small base. Employment in this sector increased 325.0% since 1998, for a net gain of 13 jobs. The second-highest increase was felt in the education sector, which rose 104.9% during the same period. The largest employment declines in Nobleton were felt in the public administration and wholesale trade sectors, which decreased by 14 and 11 jobs, respectively.

Schomberg

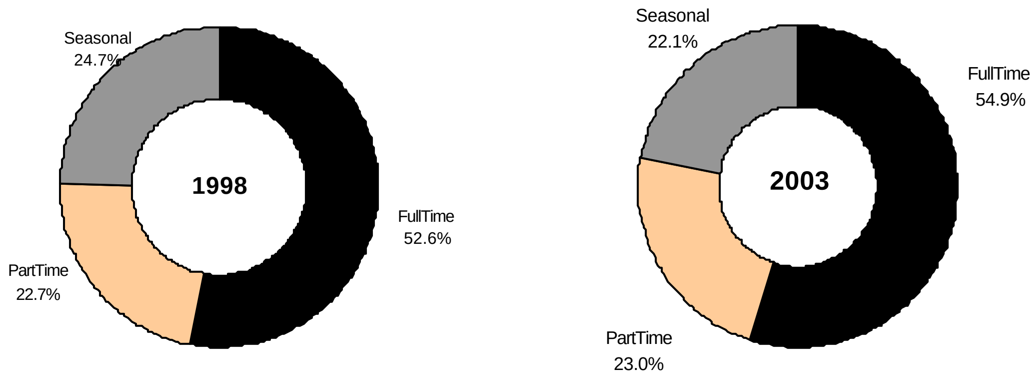
The community of Schomberg witnessed an increase in both the number of employees and the number of businesses in the area between 1998 and 2003. Employment increased 70.2% over five years, while the number of businesses rose 25.0%. As of 2003, there were 999 people working in 100 firms.

The largest gains were felt in the manufacturing and construction sectors, which grew 150.0% and 137.5% in four years. Manufacturing and retail trade accounted for the majority of employment in Schomberg, with manufacturing employing 43.5% of the workforce and retail trade employing 23.6%. The transportation/warehousing sector declined 64.7% due to the downsizing of one business in the area, resulting in a loss of 11 jobs.

Employment by Type of Worker

Employment by type of worker remained relatively stable in King Township, with full-time employment comprising 54.9% of jobs in 2003, compared to 52.6% in 1998 (see Figure 36: Employment Distribution by Type of Worker, King, 1998 & 2003). Part-time employment continued to hover around 23% between 1998 and 2003, while seasonal employment declined slightly during this period.

Figure 36:
Employment Distribution by Type of Worker, King, 1998 & 2003



Source: York Region Planning & Development Services Department.

Business Overview

The number of businesses in King Township increased 30.5% since 1998, or 6.1% at an average annual rate. As of year-end 2003, there were 394 firms in King Township.

Business Mobility

Some 96 businesses closed or moved out of the King Township survey area between 1998 and 2003, resulting in an average annual mobility rate of 6.4%. The majority of moved or closed were in the following sectors: retail (33.3%), personal services (22.9%) and business services (11.5%). In total, firms closing and/or moving out of the survey area resulted for a loss of 247 jobs. These losses were more than offset by the arrival of 92 new firms, resulting in a net gain of 1,223 jobs in the survey area. The personal services sector experienced the largest business growth between 1998 and 2003, accounting for 38.2% of all new firms. The retail sector followed closely behind at 11.2%.

Businesses by Size

The distribution of businesses by size remained essentially unchanged in King Township between 1998 and 2003, with the proportion of small, medium and very large businesses in King (see Figure 37: Percent of Businesses by Size, King, 1998 & 2003). Large businesses inched up slightly during the period, from 2.6% to 2.8% of all businesses.

Figure 37:
Percent of Businesses by Size, King, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	88.1%	88.1%
Medium (20-99 employees)	8.9%	8.9%
Large (100-499 employees)	2.6%	2.8%
Very Large (500+ employees)	0.3%	0.3%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department.

Major Employers

Major employers in King Township include:

- Robert B. Somerville;
- Brookdale Treeland Nurseries Ltd.;
- Seneca College;
- Showa Canada Inc.
- B.C Instruments; and
- Golf courses (e.g., Cardinal, Nobleton Lakes, King Valley, Kings Riding, Carrying Place).

Development Activity

Non-residential building permits increased 45.3% in King Township in 2003, reaching $9.1 million compared to $6.3 million a year earlier. Institutional and industrial permits increased 1050.8% and 504.6% since 2002, while the value of commercial permits issued declined 65.5%.

Figure 38 provides an overview of some of the larger developments that opened and/or expanded in King Township in 2003.

Figure 38:
Recently Opened Businesses, King, 2003

Business Name	Land Use	Building Size
Stonemen's Valley Inc.	Industrial	48 sq.m. (520 sq.ft.)
Cynthia's Grooming Salon	Commercial	42 sq.m. (450 sq.ft.)
Yonge St. Self Storage	Commercial	37 sq.m. (400 sq.ft.)
Thrill of the Hunt	Commercial	37 sq.m. (400 sq.ft.)

Source: Township of King

Developments under construction in 2003 are summarized in Figure 39.

Figure 39:
Businesses Under Construction, King, 2003

Business Name	Land Use	Building Size
Brookdale Treeland Nurseries Ltd.	Industrial	4,459 sq.m. (48,000 sq.ft.)
The Kingbridge Centre*	Commercial	1,858 sq.m. (20,000 sq.ft.)
St. Thomas De Villa Nova School*	Institutional	1,672 sq.m. (18,000 sq.ft.)
Canadian Country Club Communities King Valley Ltd.	Commercial	743 sq.m. (8,000 sq.ft.)

*Expansion of existing facilities.
Source: Township of King

Markham

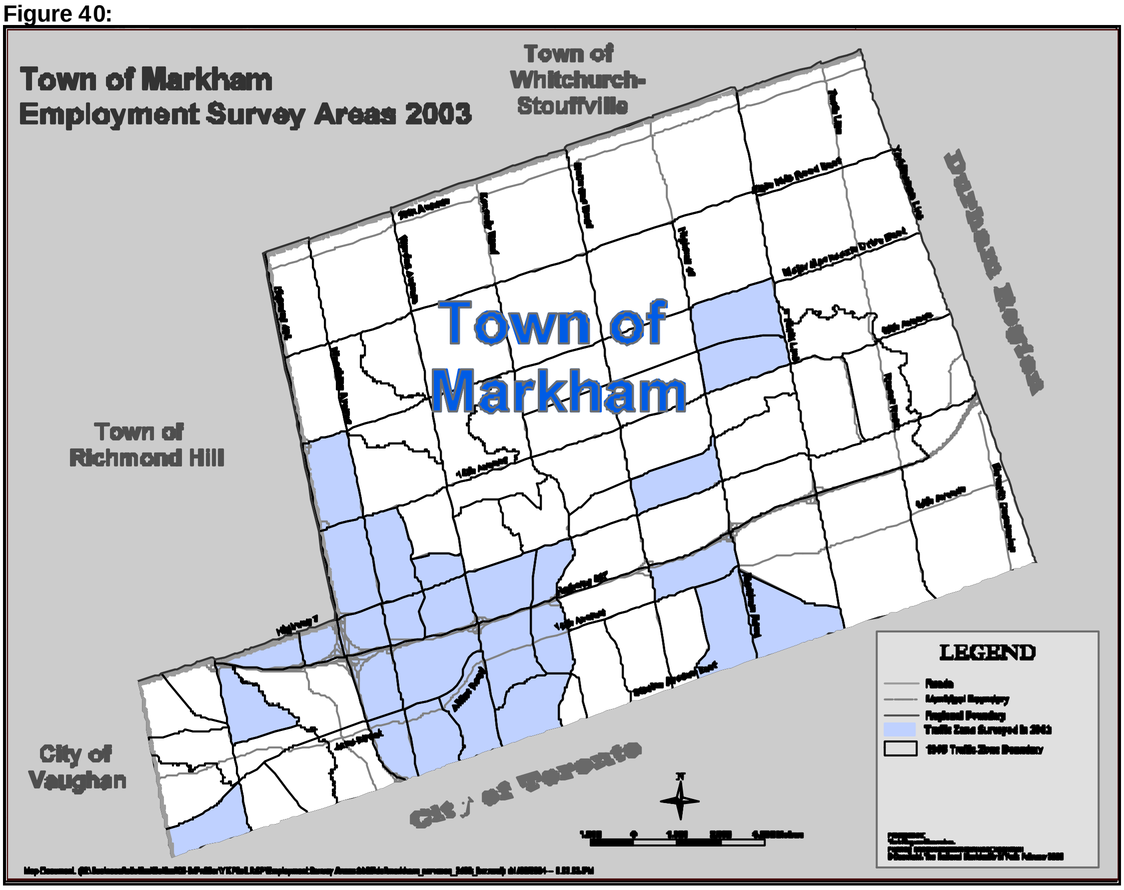
Markham Highlights:

- Jobs in survey area in 2003: 103,977 — Average annual employment growth: 5.8%
- Businesses in survey area in 2003: 5,205 — Average annual business growth: 3.8%
- Major employment sector in 2003: Business Services, 33.5%
- Fastest-growing employment sector 1998 -2003: Finance, Insurance and Real Estate, 50.5%

Employment Overview

Employment in Markham's major employment areas accounted for approximately 103,977 jobs in 2003, representing an average annual growth rate of 5.8% since 1998. (see Figure 40: Markham Survey Coverage Area).

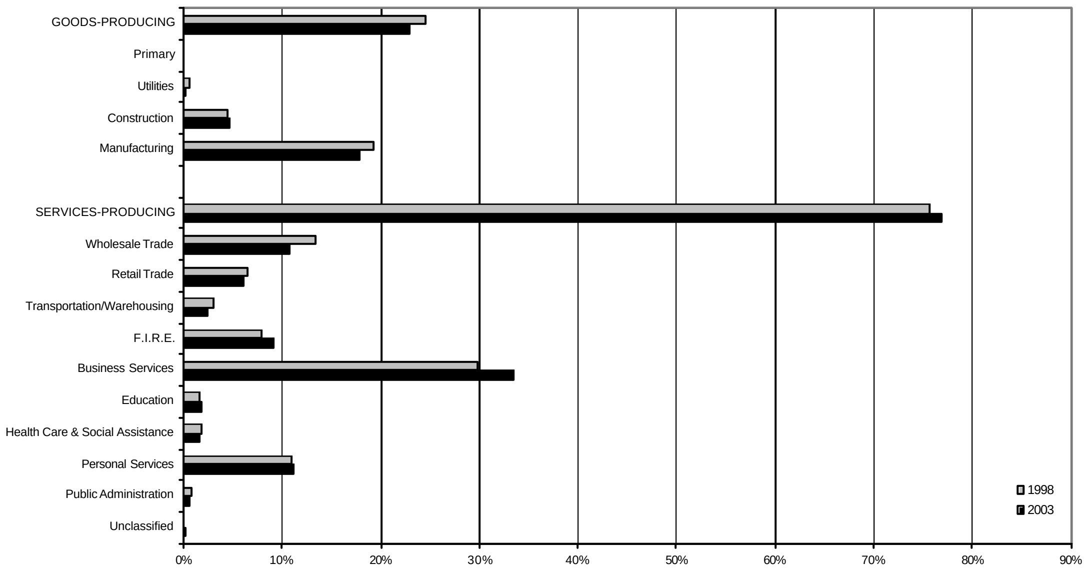
Figure 40:



Employment by Sector

Employment in Markham's employment areas is predominantly service-based, accounting for 76.9% of jobs in 2003 (see Figure 41: Employment by Industry, Markham, 1998 & 2003). This represents a slight increase from 1998 levels, where service-based employment accounted for 75.6% of employment.

Figure 41:
Employment by Industry, Markham, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

Among service-producing industries, the business services sector is the single-largest employer, accounting for 33.5% of total employment in the survey areas. Within Markham's business service sector, computer systems design and related services, management of companies and enterprises and business support services are the dominant subsectors, accounting for 35.6%, 13.2% and 11.0% of business service employment, respectively.

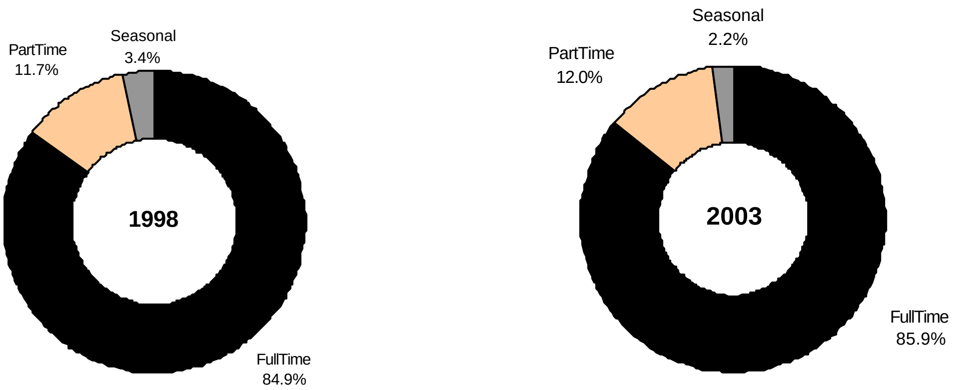
Within goods-producing industries, manufacturing is the dominant employer, accounting for 17.9% of jobs. Broken down by subsector, Markham's major types of manufacturing include computer and electronic product manufacturing, furniture and related product manufacturing and printing and related support activities. These three subsectors account for 19.8%, 15.4% and 13.9% of manufacturing employment, respectively.

The Finance, Insurance and Real Estate (FIRE) sector was fastest growing employment sector in Markham's employment areas, growing 50.5% since 1998. This increase reflects a combination of rising employment within existing firms and the establishment or relocation of 43 firms from outside the survey area. Education was the second fastest growing sector, with the number of jobs expanding by 48.8% since 1998. The sole sector to experience a decline in employment in Markham's employment areas was the utilities sector, which dropped 64.1%.

Employment by Type of Worker

An analysis by type of worker in Markham's employment areas indicated a rise in full-time employment from 84.9% in 1998 to 85.9% in 2003, while the number of part-time jobs inched upwards to 12.0% (see Figure 42: Employment Distribution by Class of Worker, Markham, 1998 & 2003).

Figure 42:
Employment Distribution by Class of Worker, Markham, 1998 & 2003



Source: York Region Planning and Development Services Department

Business Overview

Between 1998 and 2003, the total number of businesses in the surveyed areas increased 3.8% on an average annual basis. As of 2003, there were an estimated 5,205 firms in the surveyed areas.

Business Mobility

Business mobility in Markham since 1998 was the highest in York Region, with an average annual business mobility rate of 8.9% between 1998 and 2003, compared to 7.8% for the Region as a whole. Of those businesses that closed or moved since 1998, the majority of firms were in the following sectors: business services (23.7%), wholesale/distribution (18.6%) and personal services (14.7%). The recent restructuring of the high tech industry within the past few years may partially explain the high rate of mobility within the business services sector.

The closures and/or relocations among all sectors resulted in the loss of 1,952 firms and 24,254 jobs in the survey area since 1998. However, with the exception of the utilities sector, Markham witnessed a net gain in the total number of businesses and employees in these sectors between 1998 and 2003. Even when accounting for these losses, Markham witnessed an overall net gain of 829 firms and 23,394 jobs over the past five years.

Businesses by Size

Since 1998, the proportion of small businesses in Markham has remained stable, while the number of large and very large firms increased (see Figure 43).

Figure 43:
Businesses by Size, Markham, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	82.5%	82.5%
Medium (20-99 employees)	14.4%	14.0%
Large (100-499 employees)	2.9%	3.0%
Very Large (500+ employees)	0.2%	0.4%
Total	**100.0%**	**100.0%**

Source: York Region Planning and Development Services Department

Of particular note is the rate of change in which these business categories grew, with the number of very large firms increasing 162.5% since 1998, while large firms increased 25.4%. These numbers indicate the success Markham has had in attracting large corporations and nurturing the growth of existing firms.

Major Employers

Major employers in Markham include:

- IBM Canada Ltd.;
- AMEX Canada;
- Miller Paving Ltd.;
- ATI Technologies Inc.; and
- Allstate Insurance.

Development Activity

Building permits for industrial, commercial and institutional developments increased 15.6% in Markham in 2003, totalling $116.0 million. Institutional and industrial permits made up the bulk of the total, at $47.6 and $44.8 million each.

Figure 44 provides an overview of some of the larger developments that opened in Markham in 2003.

Figure 44:
Recently Opened Businesses, Markham, 2003

Business Name	Land Use	Building Size
Creation Technologies Inc.	Industrial	3,716 sq.m. (40,000 sq.ft.)
Velocite Graphics Group Ltd.	Commercial	1,115 sq.m. (12,000 sq.ft.)
BASE Intelligent Building Systems Ltd.	Commercial	929 sq.m. (10,000 sq.ft.)
L.C.B.O.	Commercial	883 sq.m. (9,500 sq.ft.)

Source: Town of Markham

A summary of some of the larger projects under construction as of year-end 2003 is provided in Figure 45.

Figure 45:
Businesses Under Construction, Markham, 2003

Business Name	Land Use	Building Size
Sunny Crunch	Industrial	7,897 sq.m. (85,000 sq.ft.)
Concord Idea	Office	7,107 sq.m. (76,500 sq.ft.)
Jacques Wh itford Environment Ltd.	Office	2,787 sq.m. (30,000 sq.ft.)

Source: Town of Markham

Newmarket

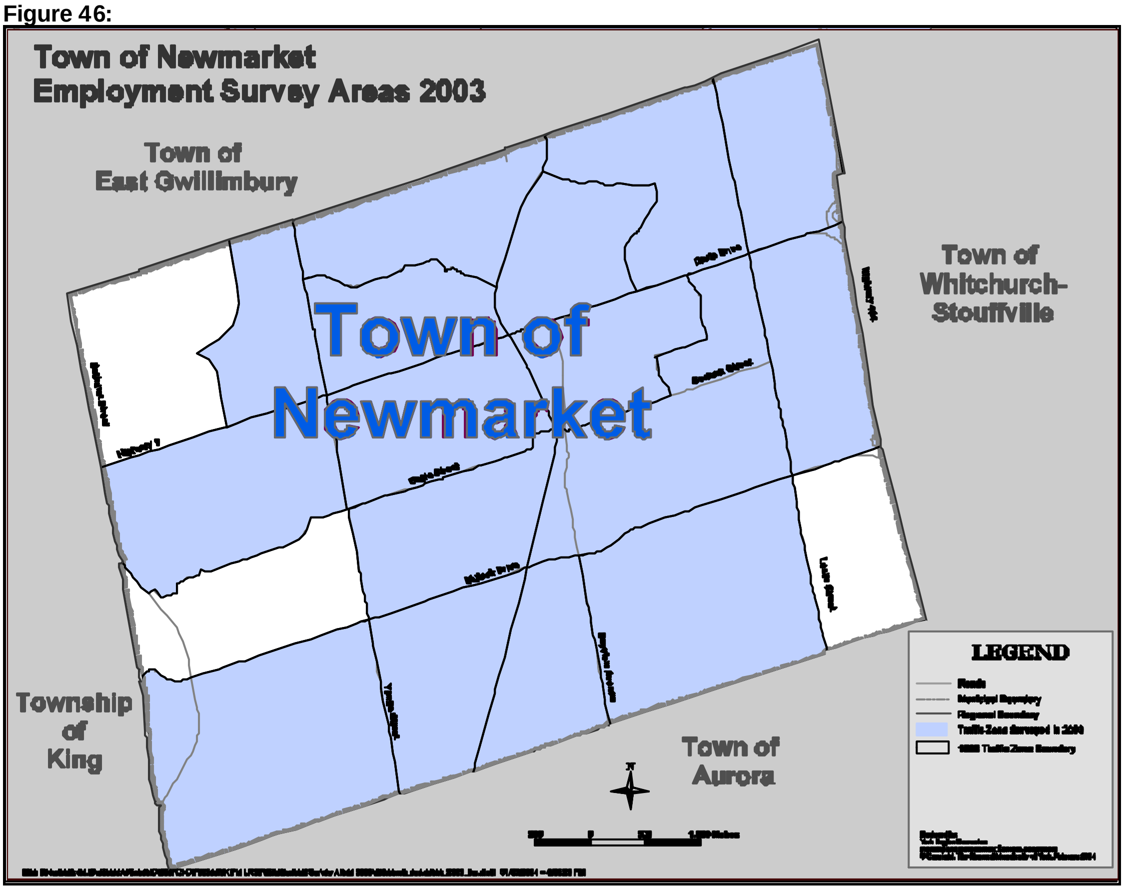
Newmarket Highlights:

- Jobs in survey area in 2003: 34,954 — Average annual employment growth: 2.0%
- Businesses in survey area in 2003: 2,079 — Average annual business growth: 3.9%
- Major employment sector in 2003: Retail Trade, 22.9%
- Fastest-growing employment sector 1998-2003: Business Services, 39.4%

Employment Overview

The number of jobs in Newmarket increased by 2.0% at an average annual rate since 1998. By 2003, there were an estimated 2,079 businesses employing 34,954 people in survey area (Figure 46: Newmarket Survey Coverage Area).

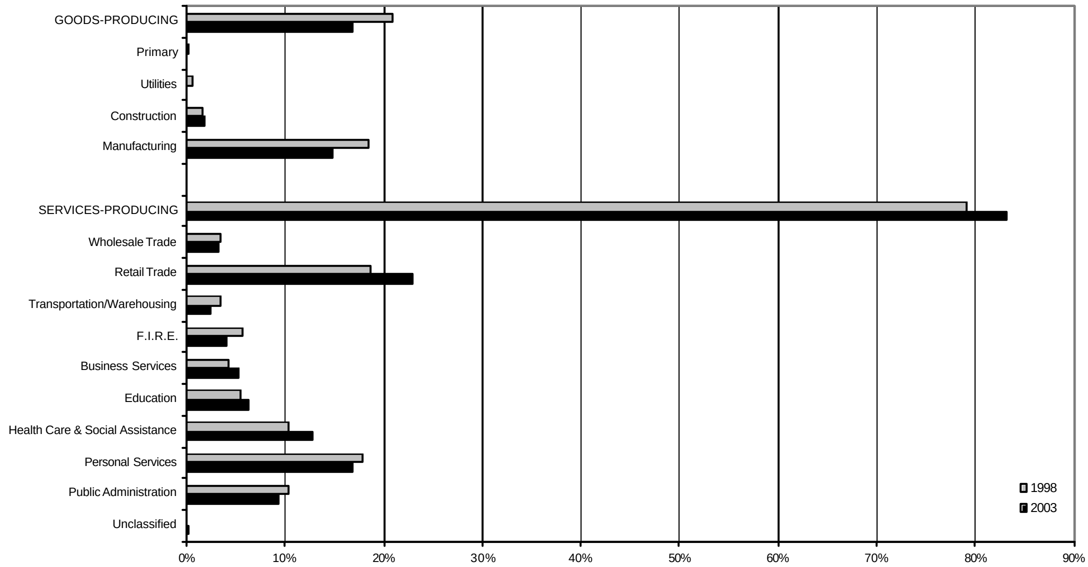
Figure 46:



Employment by Sector

Employment in Newmarket is primarily service-based, accounting for 83.1% of all jobs in the study area (see Figure 47: Employment by Industry, Newmarket, 1998 & 2003). Among service-producing industries, retail trade, personal services and health care and social assistance are the dominant sectors, accounting for 22.9%, 16.9% and 12.8% of total employment in the survey areas.

Figure 47:
Employment by Industry, Newmarket, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

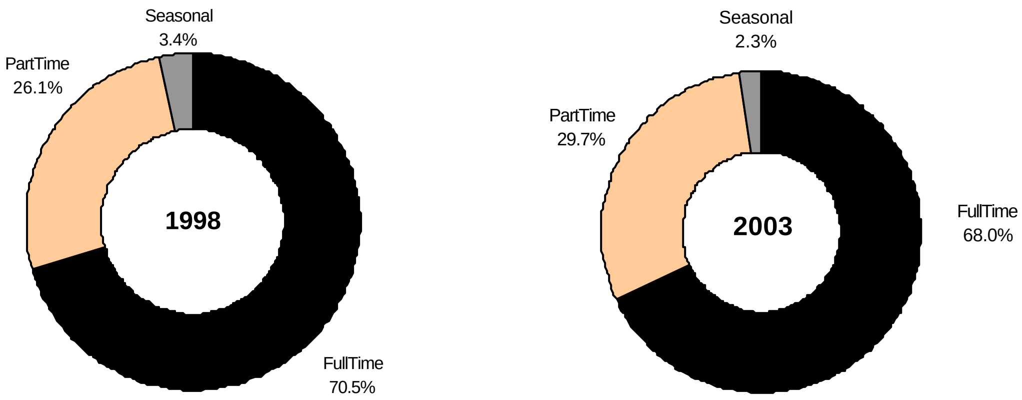
Within goods-producing industries, manufacturing is the primary employment sector, accounting for 14.8% of total employment in the survey areas. While the manufacturing and retail trade sectors accounted for a similar proportion of Newmarket's workforce in 1998, the manufacturing sector has since lost some ground as the growth in the retail sector has exceeded that of manufacturing. Within the manufacturing sector, motor vehicle parts manufacturing is the principal subsector in Newmarket, accounting for 43.5% of manufacturing employment.

Across all employment sector groupings, a number of high-growth sectors were evident in Newmarket between 1998 and 2003. While business services had the highest growth rate during this period at 39.4%, three other sectors experienced growth in excess of 30%, including: construction (36.1%), retail trade (35.2%) and health care and social assistance (34.8%). Employment declined in the utilities sector by 90.1% between 1998 and 2003 following the closure of the Newmarket Hydro office on Mulock Drive. Other sectors experiencing declining employment rates in Newmarket included transportation/warehousing (21.2%), FIRE (20.7%) and manufacturing (11.8%).

Employment by Type of Worker

Figure 48 provides insight into the distribution of employment by type of worker in Newmarket. The proportion of full-time employment in Newmarket slipped slightly between 1998 and 2003. Full-time employment accounted for 68.0% of the workforce in 2003, down from 70.5% five years earlier. Between 1998 and 2003 the number of part-time jobs increased 24.9%. In comparison, full-time jobs grew only 5.9%, while the number of seasonal jobs declined 25.5%. Recent strong growth within the retail sector may partially explain the increase in part-time employment during this period.

Figure 48:
Employment by Type of Worker, Newmarket, 1998 & 2003



Source: York Region Planning and Development Services Department

Business Overview

The number of businesses in the surveyed areas increased 19.4% since 1998, or 3.9% at an average annual rate. As of year-end 2003, there were approximately 2,079 businesses in the Newmarket survey area.

Business Mobility

Business mobility rates for Newmarket were 6.4% at an average annual rate, below the Regional average of 7.8%. Of those businesses that closed or moved between 1998 and 2003, most were in the either retail trade (34.5%) or personal services (24.0%). In total an estimated 559 firms and 5,170 jobs were lost in the survey area due to the closures and/or relocation of a number of businesses since 1998. That being said, solid employment and business growth in Newmarket since 1998 resulted in an overall net gain of 3,109 jobs and 338 firms.

Businesses by Size

An analysis of Newmarket's businesses by number of employees indicates that overall employment levels have been quite stable (see Figure 49).

Figure 49:
Businesses by Size, Newmarket, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	85.9%	86.1%
Medium (20-99 employees)	11.0%	10.9%
Large (100-499 employees)	2.7%	2.8%
Very Large (500+ employees)	0.3%	0.2%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department

Small businesses continue to dominate Newmarket's business community, accounting for 86.1% of firms in 2002. This is up slightly from 1998 levels, but only marginally.

Major Employers

Major employers in Newmarket include:

- Southlake Regional Health Centre;
- The Regional Municipality of York;
- Solectron Global Services Canada Inc;
- Dortec Industries;
- Rimply Manufacturing; and
- The Town of Newmarket.

Development Activity

The value of non-residential building permits increased 154.8% in Newmarket in 2003, recording the highest increase in York Region between 2002 and 2003. Building permits totalled $100.0 million in 2003, up from $39.2 a year earlier. Much of this increase stems from a 554.0% rise in the value of industrial permits issued, however institutional and commercial permits witnessed strong gains of 97.6% and 91.5% apiece.

An overview of some of the larger firms that opened or expanded in Newmarket within the past year is summarized in Figure 50.

Figure 50:
Recently Opened Businesses, Newmarket, 2003

Business Name	Land Use	Building Size
3D Storage	Industrial	4,690 sq.m. (50,484 sq.ft.)
Newmarket Honda	Commercial	2,516 sq.m. (27,081 sq.ft.)
Open Road Motors (BMW)	Commercial	2,047 sq.m. (22,035 sq.ft.)
Newmarket Hyundai	Commercial	1,187 sq.m. (12,777 sq.ft.)

Source: Town of Newmarket

Figure 51 provides a summary of some of the larger projects under construction in Newmarket during 2003.

Figure 51:
Businesses Under Construction, Newmarket, 2003

Business Name	Land Use	Building Size
South Lake Residential Care Village	Institutional	14,228 sq.m. (153,150 sq.ft.)
Cam Tool and Die	Industrial	13,018 sq.m. (140,132 sq.ft.)
Price Chopper	Commercial	5,111 sq.m. (55,016 sq.ft.)
Dave Wood Mazda	Commercial	3,829 sq.m. (41,216 sq.ft.)

Source: Town of Newmarket

Richmond Hill

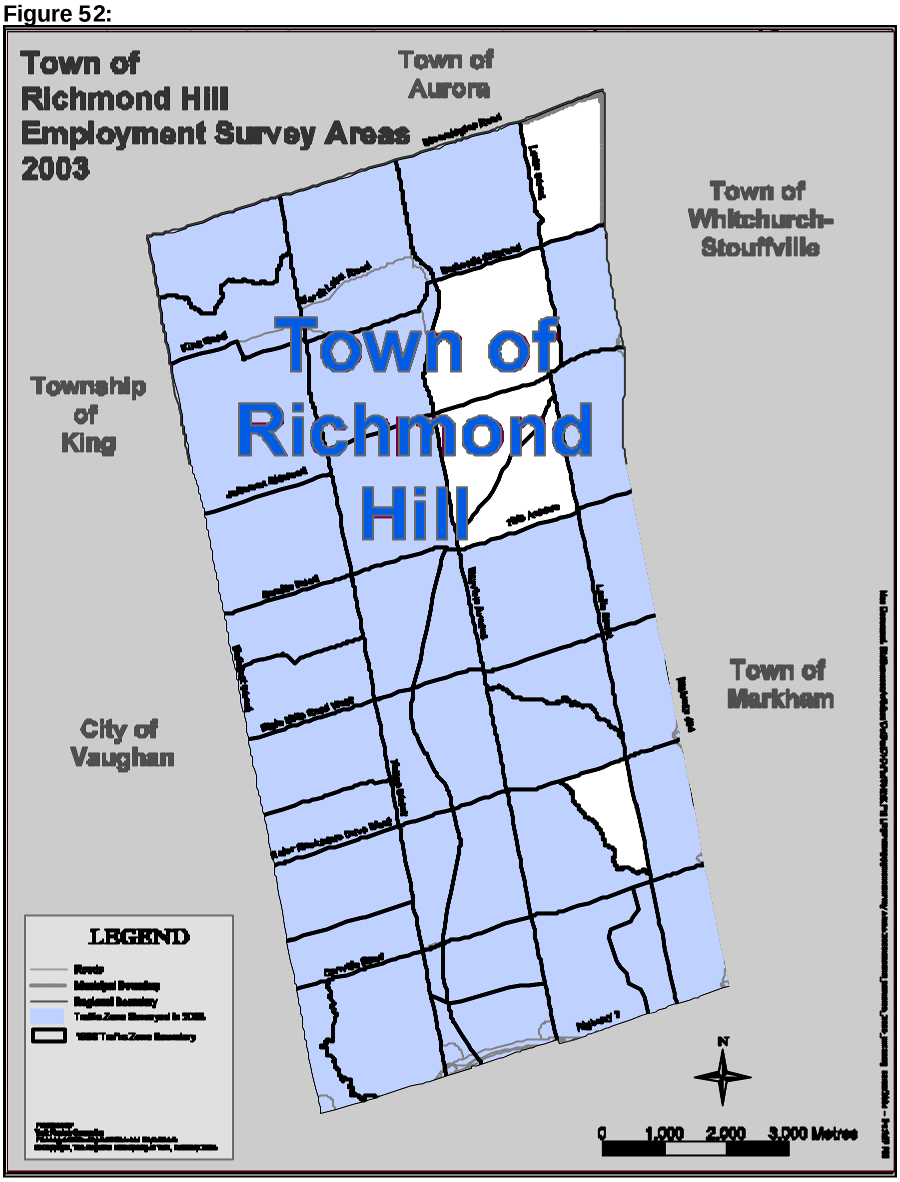
Richmond Hill Highlights:

- Jobs in survey area in 2003: 52,257 — Average annual employment growth: 5.9%
- Businesses in survey area in 2003: 3,389 — Average annual business growth: 1.9%
- Major employment sector in 2003: Personal Services, 16.9%
- Fastest-growing employment sector 1998-2003: FIRE, 72.3%

Employment Overview

Employment in Richmond Hill's survey areas increased 31.7% since 1998, or 6.3% at an average annual rate (see Figure 52: Richmond Hill Survey Coverage Area). These areas contained an estimated 52,257 jobs as of year-end 2003.

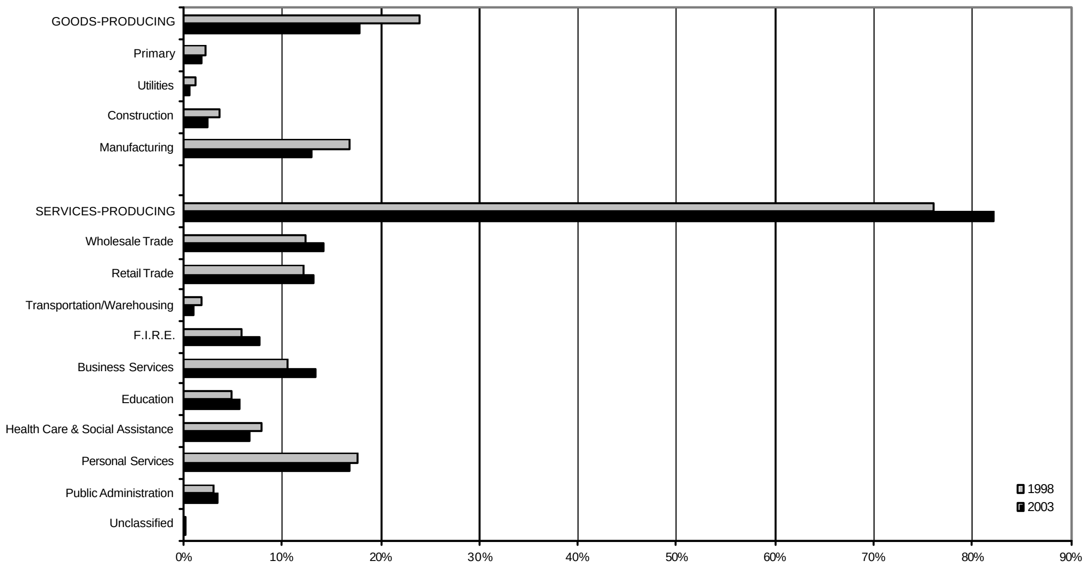
Figure 52:



Employment by Sector

Employment in Richmond Hill was predominantly service-oriented in 2003, accounting for 82.1% of employment (see Figure 53: Employment by Industry, Richmond Hill, 1998 & 2003). This is an increase from 1998, when service-industries accounted for 75.7% of employment in the Town.

Figure 53:
Employment by Industry, Richmond Hill, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

Service-producing employment was spread out across a number of sectors, with personal services accounting for 16.9% of employment in the area andwholesale trade and business services close behind at 14.2% and 13.4%, respectively. Within the personal services sector restaurants were the dominant subsectors, with full-service restaurants and limited service eating establishments accounting for 25.4% and 12.0% of personal services employment as of 2003.

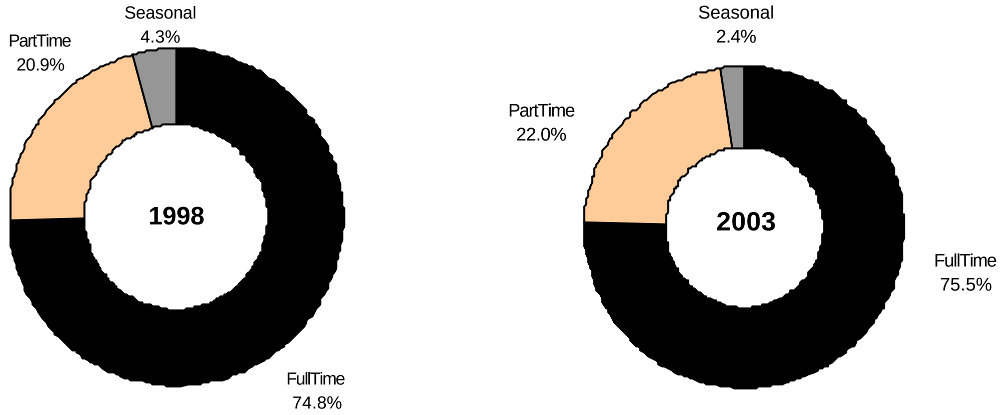
Among goods-producing industries, manufacturing was the dominant sector, comprising 12.9% of total employment in the survey area. The top three manufacturing subsectors within Richmond Hill's manufacturing sector were motor vehicle parts manufacturing (10.1%), computer and peripheral equipment manufacturing (8.8%) and printing and related support activities (8.7%).

Job growth was widespread in Richmond Hill, with eight sectors experiencing double-digit increases in employment between 1998 and 2003. The F.I.R.E. and business services sectors were among the fastest growing employment sectors in Richmond Hill, which witnessed employment increases of 72.3% and 64.8%, respectively. Education and wholesale trade sectors also experienced growth rates in excess of 50%. Slight declines in employment were experienced in Richmond Hill in the following sectors: transportation/warehousing (37.9%), utilities (34.0%) and construction (12.7%).

Employment by Type of Worker

The number of full-time and part-time jobs increased 31.0% and 36.4% between 1998 and 2003, while seasonal employment dipped slightly. As of 2003, full-time employment accounted for 75.5% of employment in Richmond Hill, compared to 74.8% in 1998 (see Figure 54: Employment Distribution by Class of Worker, Richmond Hill, 1998 & 2003).

Figure 54:
Employment Distribution by Class of Worker, Richmond Hill, 1998 & 2003



Source: York Region Planning and Development Services Department

Business Overview

The number of firms in Richmond Hill's survey area increased 29.7% since 1998, or 5.9% at an average annual rate. At year-end 2003, there were an estimated 3,389 firms in Richmond Hill.

Business Mobility

Business mobility in Richmond Hill's employment areas was moderate overall during the survey period, averaging 6.4% annually. A total of 1,208 firms either closed or relocated outside of the survey area since 1998, resulting in a loss of 10,457 jobs. The four employment sectors which experienced the highest mobility in Richmond Hill were retail trade (21.9%), business services (17.3%), personal services (17.3%) and wholesale trade (16.0%). Despite these losses, Richmond Hill experienced a net gain of 11,968 jobs and 292 firms between 1998 and 2003.

Businesses by Size

Small businesses made up 85.7% of Richmond Hill's business community in 2003, down slightly from 1998 rates as the proportion of medium and large-sized firms increased (see Figure 55).

Figure 55:
Businesses by Size, Richmond Hill, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	87.3%	85.7%
Medium (20-99 employees)	10.7%	11.7%
Large (100-499 employees)	1.9%	2.4%
Very Large (500+ employees)	0.1%	0.1%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department

This growth in the number of medium and large-sized firms highlights the desirability of Richmond Hill as a business destination for both large firms looking to locate in the Town and as existing firms to expand.

Major Employers

Major employers in Richmond Hill include:

- York Central Hospital;
- Royal Bank of Canada;
- Ronalds (Quebecor) Printing;
- Novex Pharma;
- Compugen; and
- Rogers Communication.

Development Activity

Despite a 609.2% increase in industrial building permits in 2003, non-residential building permits declined 20.3% in Richmond Hill over the past year. As of 2003, industrial, commercial and institutional permits totalled $76.4 million, down from $95.9 million in 2002. Institutional and commercial permits both experienced double-digit declines, dropping 41.6% and 25.6%, respectively.

Figure 56 summarizes a few of the larger developments that opened in Richmond Hill in 2003.

Figure 56:
Recently Opened Businesses, Richmond Hill, 2003

Business Name	Land Use	Building Size
Sam's Club	Commercial	11,148 sq.m. (120,000 sq.ft.)
United Plastics	Industrial	1,858 sq.m. (20,000 sq.ft.)
E Mart Depot	Industrial	1,022 sq.m. (11,000 sq.ft.)
Golden Court Abalone Restaurant	Commercial	743 sq.m. (8,000 sq.ft.)

Source: Town of Richmond Hill

A summary of some of the larger projects that were under construction in Richmond Hill in 2003 is provided in Figure 57.

Figure 57:
Businesses under Construction, Richmond Hill, 2003

Business Name	Land Use	Building Size
Richmond Green Public High School	Institutional	13,486 sq.m. (145,158 sq.ft.)
Wal-Mart	Commercial	12,049 sq.m. (129,691 sq.ft.)
Orlando Corporation*	Industrial	5,482 sq.m. (59,006 sq.ft.)
Queen's College Drive Elementary School	Institutional	52,001 sq.m. (55,976 sq.ft.)

*Expansion of existing facilities.
Source: Town of Richmond Hill

Vaughan

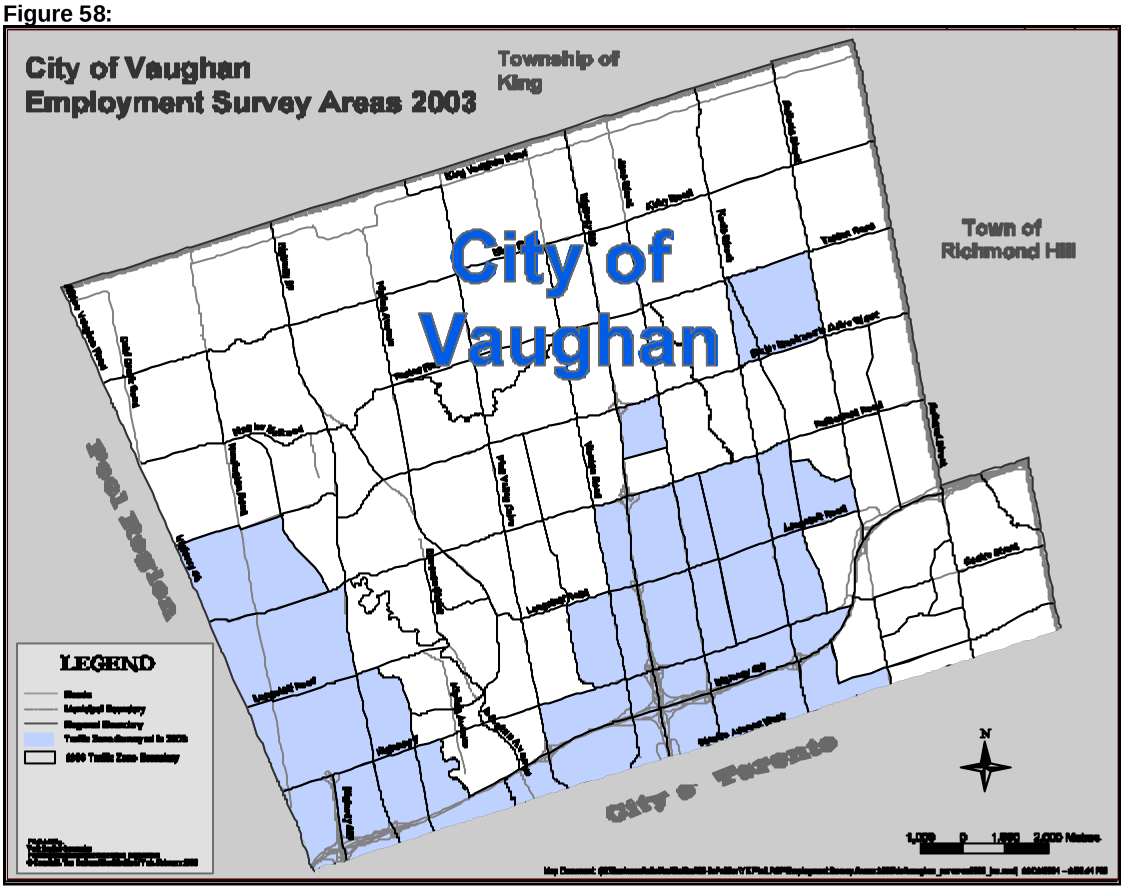
Vaughan Highlights:

- Jobs in survey area in 2003: 104,502 — Average annual employment growth: 3.5%
- Businesses in survey area in 2003: 5,048 — Average annual business growth: 1.8%
- Major employment sector in 2003: Manufacturing, 38.9%
- Fastest-growing employment sector 1998-2003: Health Care & Social Assistance, 91.8%

Employment Overview

Between 1998 and 2003, employment growth in Vaughan's major employment areas grew at an average annual rate of 3.5% per year (see Figure 58: Vaughan Survey Coverage Area). As of year-end 2003, an estimated 104,502 jobs were located in these areas, up from 88,759 jobs in 1998.

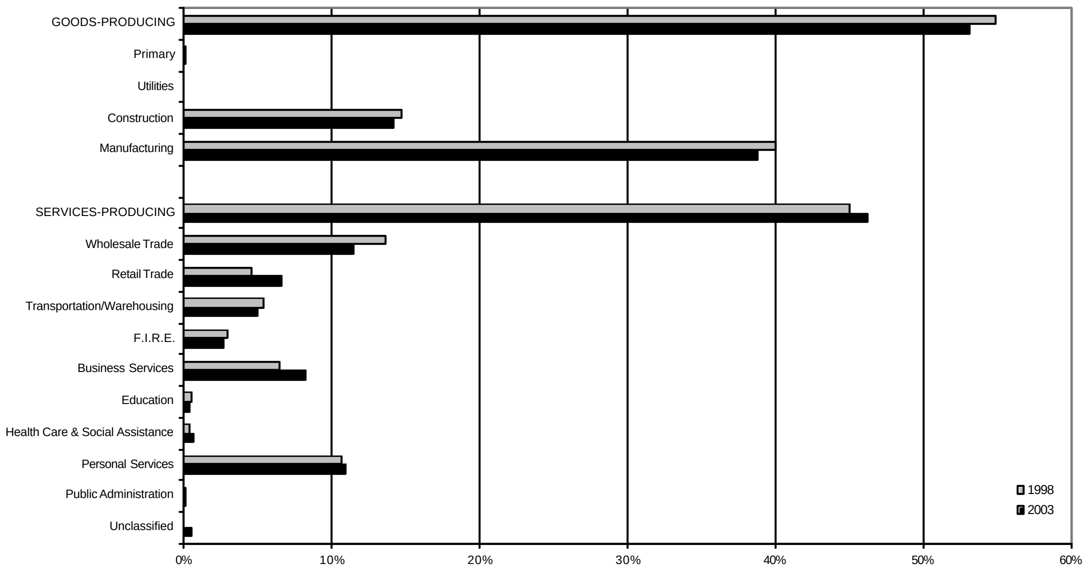
Figure 58:



Employment by Sector

Goods-producing industries accounted for 53.2% of employment in Vaughan's employment areas in 2003, down slightly from 1998 rates (see Figure 59: Employment by Industry, Vaughan, 1998 & 2003).

Figure 59:
Employment by Industry, Vaughan, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

Among goods-producing industries, manufacturing was by far the largest sector in Vaughan in 2003, accounting for 38.9% of total employment in the employment areas. Within this sector, the top three subsectors were: motor vehicle parts manufacturing (12.2%), plastics product manufacturing (11.9%) and printing and related support activities (5.3%). Vaughan also has a large construction sector, which represented 14.2% of municipal employment and accounted for 61.7% of total construction employment in York Region in 2003.

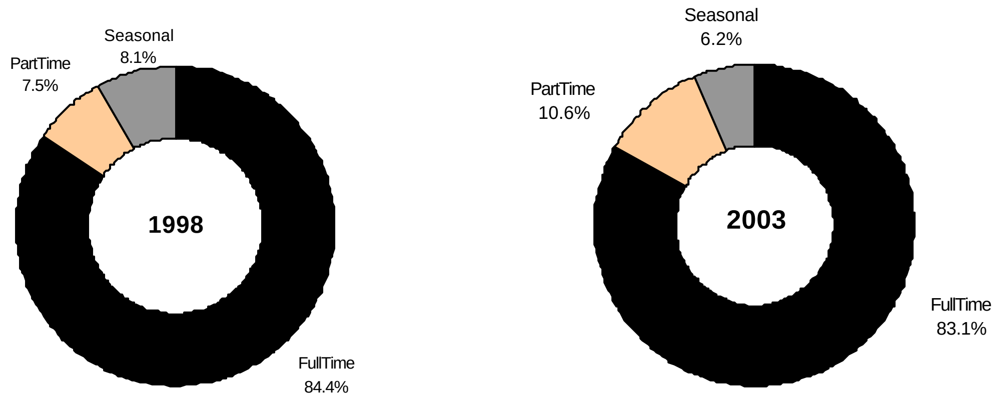
Within service-producing industries, wholesale trade and personal services were the dominant sectors, employing 11.6% and 11.0% of all jobs in Vaughan's employment areas in 2003.

The employment sector with the highest growth rate in Vaughan since 1998 was health care and social assistance, which grew 91.8% during the five-year period. Retail trade was the second-fastest growing industry sector between 1998 and 2003, rising 72.1% during this period. Slight employment declines were experienced in public administration (10.2%), education (3.7%) and wholesale trade (0.8%).

Employment by Type of Worker

A 66.6% jump in the number of part-time jobs in Vaughan since 1998 resulted in part-time employment gaining an increased share of total employment in Vaughan from 1998 to 2002. During this period, part-time jobs rose from 7.5% to 10.6% (see Figure 60: Employment Distribution by Class of Worker, 1998 & 2003). This is likely due in large part to the strong growth in retail employment, which is typically part-time in nature. Full-time workers accounted for 83.1% of all jobs in 2003, down slightly from 1998 levels.

Figure 60:
Employment Distribution by Class of Worker, Vaughan, 1998 & 2003



Source: York Region Planning and Development Services Department

Business Overview

Businesses in Vaughan's employment areas increased 9.1% since 1998, or 1.8% on an average annual basis. By 2003, there were some 5,048 firms in Vaughan.

Business Mobility

Business mobility in Vaughan was the second highest in York Region, averaging 8.9% on an annual basis. In total, 2,056 businesses either moved or closed in Vaughan since 1998. Of those, the largest losses were in the following sectors: manufacturing (22.9%), wholesale trade sector (17.3%), personal services (17.2%) and business services (12.4%). These closures and/or relocations outside of the study area resulted in a loss of 24,087 jobs since 1998. These losses were offset by the addition of 2,477 firms and 39,830 jobs since 1998 within the study area, for a net gain of 421 firms and 15,743 jobs.

Businesses by Size

Figure 61 outlines the distribution of businesses in Vaughan by size category.

Figure 61:
Businesses by Size, Vaughan, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	80.0%	79.6%
Medium (20-99 employees)	17.1%	16.8%
Large (100-499 employees)	2.7%	3.2%
Very Large (500+ employees)	0.2%	0.4%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department

While the number of small and medium businesses declined slightly since 1998, the proportion of large and very large firms in Vaughan increased. This indicates Vaughan's increasing desirability among large firms as a place to locate and for existing firms wishing to expand locally.

Major Employers

Major employers in Vaughan include:

- Paramount Canada's Wonderland;
- Royal Group Technologies;
- City of Vaughan;
- Progressive Moulded Products Ltd.;
- Decoseal;
- Sears Canada;
- CN Rail;
- Co-Ex-Tec Industries; and
- Noma Automotive.

Development Activity

Development activity in Vaughan increased 83.1% in 2003, with $519.1 million non-residential building permits being issued compared to $283.6 million in 2002. Commercial and industrial building permits witnessed the largest increase, rising 112.4% and 78.0%, respectively. In comparison, institutional permits increased 53.2%.

A number of firms opened or expanded their presence in Vaughan in 2003. Figure 62 provides an overview of some of the larger developments.

Figure 62:
Recently Opened Businesses, Vaughan, 2003

Business Name	Land Use	Building Size
IKEA	Commercial	29,464 sq.m. (317,158 sq.ft.)
Sam's Club	Commercial	12,258 sq.m. (131,945 sq.ft.)
Natus Technology Corps.	Industrial	4,181 sq.m. (45,000 sq.ft.)
The Venetian	Commercial	2,787 sq.m. (30,000 sq.ft.)

Source: City of Vaughan

Several businesses were also under construction in 2003. The largest development under construction in 2003 was the new Vaughan Mills shopping centre. Scheduled to open in the fall of 2004, once completed this facility will house over 200 stores and create approximately 3,500 full and part-time jobs. A summary of this and other large projects under construction in Vaughan is provided in Figure 63.

Figure 63:
Businesses under Construction, Vaughan, 2003

Business Name	Land Use	Building Size
Vaughan Mills Shopping Centre	Commercial	117,738 sq.m. (1,267,332 sq.ft.)
Totalline Transport Inc	Industrial	29,831 sq.m. (321,101 sq.ft.)
El-En Packaging Co. Ltd.	Industrial	12,957 sq.m. (139,469 sq.ft.)
Antamex International Inc.	Industrial	11,905 sq.m. (128,145 sq.ft.)

Source: City of Vaughan

Whitchurch-Stouffville

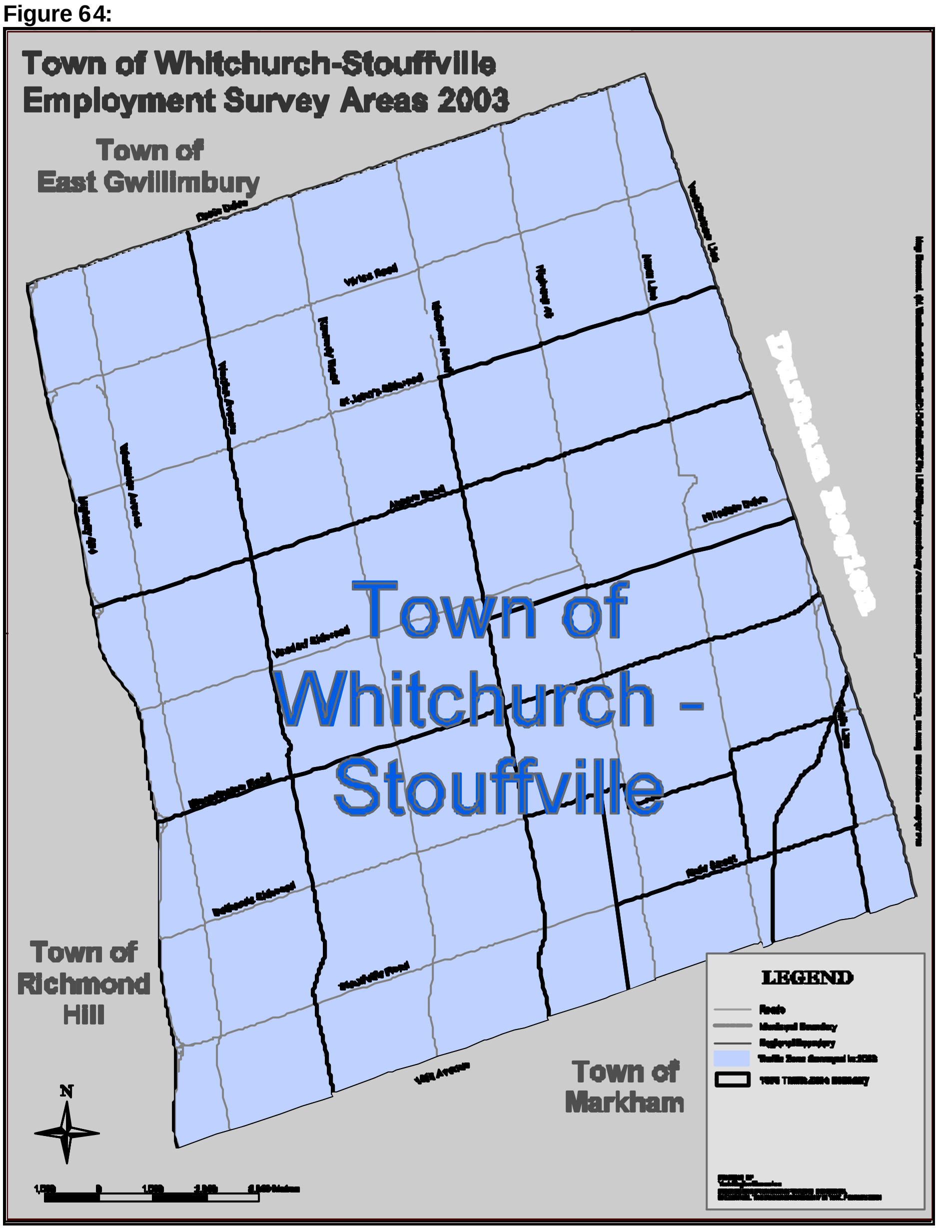
Whitchurch-Stouffville Highlights:

- Jobs in survey area in 2003: 8,394 — Average annual employment growth: 8.5%
- Businesses in survey area in 2003: 696 — Average annual business growth: 5.7%
- Major employment sector in 2003: Personal Services, 24.8%
- Fastest-growing employment sector 1998-2003: Health Care & Social Assistance, 96.7%

Employment Overview

Whitchurch-Stouffville's survey area had an estimated 8,394 jobs in 2003 (see Figure 64: Whitchurch-Stouffville Survey Coverage Area). This represents an average annual growth rate of 8.5% from 1998 levels.

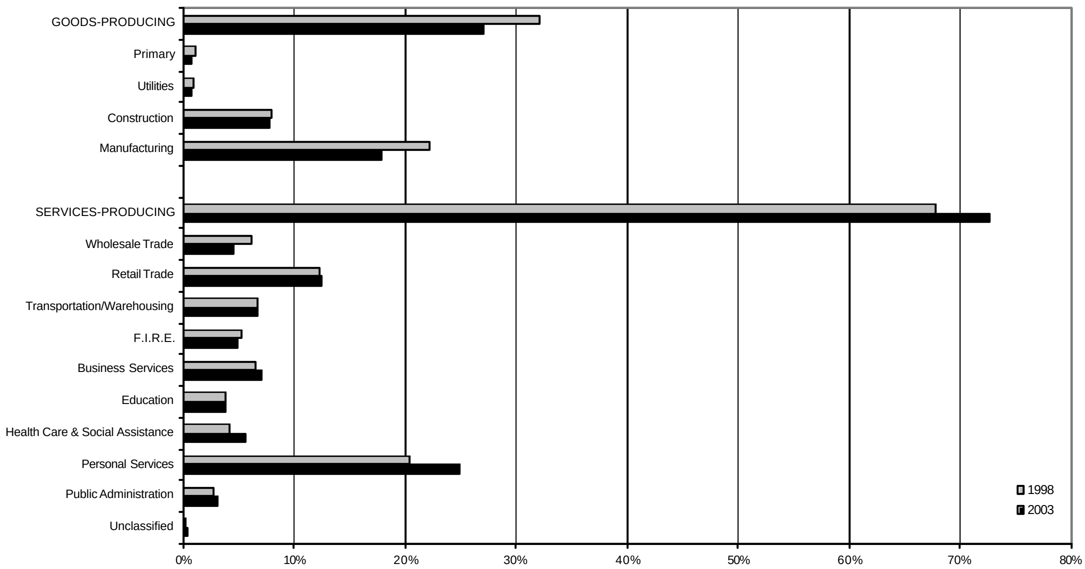
Figure 64:



Employment by Sector

The majority of employment in Whitchurch-Stouffville is concentrated in service-producing industries, accounting for 72.7% of employment in the survey area (see Figure 65: Employment by Industry, Whitchurch-Stouffville, 1998 & 2003).

Figure 65:
Employment by Industry, Whitchurch-Stouffville, 1998 & 2003



F.I.R.E.: Finance, insurance, real estate & leasing.
Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services.
Personal Services: Information, Culture & Recreation; Accomodation & Food Services; and Other Services.
Unclassified: Insufficient data available to classify industry.

Note: Data based on comparable areas surveyed in 1998 and 2003 York Region Employment Surveys.
Excludes most home and farm-based businesses.
Source: York Region Planning & Development Services Department

Within the service-producing category, personal services and retail trade are the primary employment sectors, employing 24.8% and 12.4% of workers in the area. Golf-related employment accounts for 34.9% of jobs within the personal services sector.

Of the 27.0% of local employment in the goods-producing sector, 17.8% was located in the manufacturing sector in 2002, down from 22.5% in 1998. Within the manufacturing sector, other electrical equipment and component manufacturing, pharmaceutical and medicine manufacturing and other wood product manufacturing are the primary subsectors, accounting for 20.2%, 16.4% and 10.1% of manufacturing employment, respectively.

Among all employment sectors, employment growth was highest in the health care and social assistance sector, growing 96.7%. A total of 233 new jobs were added to the this sector since 1998. Other large growth employment sectors in 2003 included personal services (72.9%), public administration (56.9%) and business services (52.2%).

Employment by Community

The following analysis outlines employment trends in the individual communities located within Whitchurch-Stouffville:

Stouffville

As of year-end 2003 there were an estimated 4,571 jobs in the community of Stouffville, up from 2,972 in 1998. Personal services, manufacturing and retail trade were the primary employment sectors in Stouffville in 2003, accounting for 22.2%, 20.3% and 19.3% of employment, respectively.

Major employment growth occurred in the business services and personal services sectors, growing 114.0% and 100.4% respectively. Employment in the education and retail trade sectors also fared well, growing by 72.8% and 65.1% between 1998 and 2003. Slight employment declines were experienced in the public administration (7.4%) and utilities sectors (5.2%) since 1998.

Ballantrae

Ballantrae employment rose 44.4% between 1998 and 2003. There are currently 351 people working in 50 businesses in Ballantrae. Health care and social assistance is the dominant sector in Ballantrae, accounting for 30.8% of employment, followed by the business services sector at 19.9%.

Significant employment gains in Ballantrae were experienced in the following sectors: public administration (300.0%, or 6 new jobs), primary services (183.3%, or 11 new jobs) and personal services (118.5%, or 32 new jobs). Minor employment declines were experienced in education and manufacturing, which together accounted for a loss of 3 jobs.

Gormley

Businesses and employment in Gormley both increased since 1998, recording corresponding increases of 49.3% and 79.5% each. As of year-end 2003 there were 1,714 jobs and 100 firms in Gormley. The major employment sectors included transportation/warehousing and personal services, accounting for a corresponding 22.7% and 22.1% of jobs.

Since 1998, the personal services and construction sector recorded the largest increase in Gormley since 1998. Personal services grew 372.5%, adding 298 new jobs. The construction sector also witnessed a significant gain in employment, growing 282.9% and adding 215 new jobs.

Vandorf

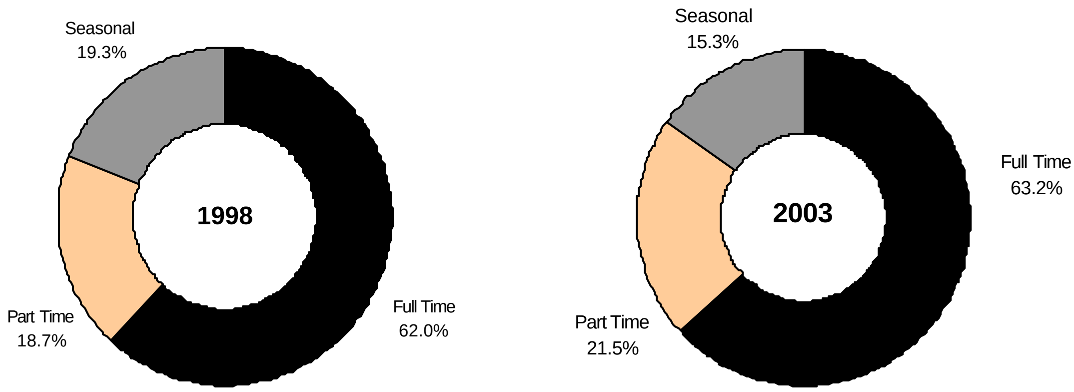
Despite a net gain of five firms in the area since 1998, employment in Vandorf declined 22.4% over this period. As of year-end 2003, there were 477 jobs in 53 businesses, compared to 48 firms employing 615 workers. The major employment sectors in Vandorf are manufacturing and construction, which accounted for 34.2% and 24.1% of jobs in the area as of 2003.

The rate of employment growth was strongest in the F.I.R.E. sector, which grew 433.3% adding 13 new jobs. This was followed by business services, which grew at 350.0% and added 35 new employees. Employment declines were felt strongest in the wholesale trade, education and primary sectors, dropping 82.0%, 42.2% and 30.0%, respectively.

Employment by Type of Worker

The majority of jobs in Whitchurch-Stouffville were full-time in 2003, with 63.2% of jobs falling into this category (see Figure 66: Employment by Type of Worker, Whitchurch-Stouffville, 1998 & 2003). The proportion of part-time employment in Whitchurch-Stouffville grew from 18.7% in 1998 to 21.5% in 2003 due to a 63.4% increase in the number of part-time jobs. While full-time and seasonal employment growth was also robust at 45.1% and 12.9% during the survey period, it was unable to keep pace with part-time job growth.

Figure 66:
Employment by Type of Worker, Whitchurch-Stouffville, 1998 & 2003



Source: York Region Planning and Development Services Department

Business Overview

The number of businesses in the surveyed areas increased 28.3% over five years, or 5.7% on an average annual basis. At year-end 2003, there were an estimated 676 firms.

Business Mobility

Since 1998, business mobility in Whitchurch-Stouffville has averaged 6.4% annually, slightly below the Regional average of 7.8%. Of those firms that closed or moved, most were in the following sectors: retail trade (26.0%), personal services (23.7%), and manufacturing (11.2%). In total, an estimated 169 firms either closed or relocated outside of the study area, resulting in a loss of 894 jobs. Despite these losses, the expansion and/or addition of new businesses resulted in a net gain of 149 firms and 2,495 jobs even after taking the previously mentioned losses into account. Business services accounted for 14.8% of all new firms, while the personal services and wholesale trade sectors represented 14.1% and 13.3% of business growth.

Businesses by Size

While small firms comprise the majority of businesses in Whitchurch-Stouffville, there is evidence of a growing number of medium and large firms in the area. Between 1998 and 2003, the number of small firms increased 26.5% to comprise 85.4% of all businesses, while medium and large firms increased 31.3% and 114.3% from 1998 levels (see Figure 67).

Figure 67:
Percent of Businesses by Size, Whitchurch-Stouffville, 1998 & 2003

Business Size Category	1998	2003
Small (1-19 employees)	86.5%	85.4%
Medium (20-99 employees)	12.1%	12.4%
Large (100-499 employees)	1.3%	2.2%
Very Large (500+ employees)	0.0%	0.0%
Total	**100.0%**	**100.0%**

Source: York Region Planning & Development Services Department

While the sample size in the survey area is relatively small, the increasing number of larger businesses is indicative of the growing attraction of Whitchurch-Stouffville as a business destination.

Major Employers

Major employers in Whitchurch-Stouffville include:

- Noma Cable Tech Company Ltd.;
- Town of Whitchurch-Stouffville;
- A&P;
- Novapharm Ltd.; and
- Golf courses (e.g., Gormley Green, Rolling Hills, Spring Lakes, Maples of Ballantrae, Ballantrae Golf & Country Club, St. Andrews East Golf & Country Club, Timber Creek, Sleepy Hollow, Meadowbrook and Station Creek).

Development Activity

The value of non-residential building permits issued in Whitchurch-Stouffville dropped 45.1% in 2003 over 2002 levels. As of year-end 2003, approximately $12.2 million worth of non-residential permits were issued, compared to $22.1 million a year earlier. Despite a 77.1% increase in the value of institutional permits issued in Whitchurch-Stouffville in 2003, declines of 74.0% and 57.2% in industrial and commercial permits resulted in an overall drop in non-residential permits.

Figure 68 summarizes some of the larger businesses that either opened or expanded in 2003.

Figure 68:
Recently Opened Businesses, Whitchurch-Stouffville, 2003

Business Name	Land Use	Building Size
Powell Contracting Ltd.	Industrial	2,880 sq.m. (31,000 sq.ft.)
Giant Tiger Department Store	Commercial	929 sq.m. (10,000 sq.ft.)
The Pulse Total Fitness & Aerobic Centre	Commercial	418 sq.m. (4,500 sq.ft.)
East Side Mario's	Commercial	372 sq.m. (4,000 sq.ft.)
Canadian Autobody and Collision	Industrial	372 sq.m. (4,000 sq.ft.)

Source: Town of Whitchurch-Stouffville

Details on businesses under construction in 2003 are provided in Figure 71.

Figure 69:
Businesses Under Construction, Whitchurch-Stouffville, 2003

Business Name	Land Use	Building Size
Cult Iron Works	Industrial	697 sq.m. (7,500 sq.ft.)
Shoeless Joe’s Restaurants	Commercial	390 sq.m. (4,200 sq.ft.)
Country Style Donuts	Commercial	223 sq.m. (2,400 sq.ft.)

Source: Town of Whitchurch-Stouffville

Appendix A: Methodology

Data Collection

Data collection for the York Region Employment Survey concentrated on businesses located within designated employment areas and rural community centres. Employment areas refer to areas that have historically been identified as industrial but may now also include commercial businesses and industrial support activities. Large-format retail "power centres" are also increasingly locating within these areas, taking advantage of the large tracts of contiguous space available to accommodate the increased space these stores require.

Traffic zones, which represent the smallest unit of measure for which historical employment data is available, were used to approximate existing employment areas. If an employment area was located within a portion of a traffic zone, all businesses located within that traffic zone were surveyed.

Data was collected from York Region businesses in a variety of forms:

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

Businesses located within targeted employment areas were contacted between May and August of 2003 by York Region Employment Surveyors. The primary method of contact was through door-to-door interviews. The door-to-door methodology, while time intensive, was warranted due to the elapsed time since the last survey in these areas, and the analytic requirement of getting a complete data set for the area. Survey interviewers used survey sheets pre-printed with business information if that business was already listed in the York Region Employment Database and a blank survey form for new businesses (see Figure 70).

Figure 70:
York Region Employment Survey 2003 Form

Ontario's Rising Star
York Region
Markham · Vaughan · Richmond Hill · Newmarket · Aurora
Georgina · Whitchurch-Stouffville · East Gwillimbury · King

York Region Business and Employment Update 2003

Please take a moment to complete the following form to update our records.
Your assistance in providing this information is greatly appreciated.

---BUSINESS IDENTIFICATION---

Business Name:

Internet Address:

Business Activity:
What does your Business Do?

--- EMPLOYMENT---

	---On-Site---	---Off-Site---	---Total---
Full-time (30+ hrs/week):			
Part-time:			
Seasonal:			
Total Employment:			
Number of Shifts:			

Hiring in Next 3 Months: ☐ Yes ☐ No ☐ Unsure

---ADDRESS---

Physical Address: **Municipality:** **Postal Code:**

Mailing Unit: **Other Occupied Units:**

Mailing Address (if different from above): **Postal Code:**

---CONTACT INFORMATION---

Survey Information Contact (for future Information updates)

Name: **Title:**

Phone: **Ext:** **Fax:** **E-Mail:**

Corporate Executive Contact (e.g., Manager, Owner, President)

Name: **Title:**

Phone: **Ext:** **Fax:** **E-Mail:**

---BUSINESS DIRECTORY LISTING---

Do you want to have your business listed for FREE in local and regional business directories? ☐ Yes ☐ No

Contact Name to appear in Directory: Same as Survey Information Contact above: ☐ Yes Same as Corporate Executive Contact above: ☐ Yes

If contact information is different from above, please complete below:

Name: **Title:**

Phone: **Ext:** **Fax:** **E-Mail:**

Publish Fax? ☐ Yes ☐ No

Do you want to add a longer business activity to your listing? (If "Yes", append and return with this form) ☐ Yes ☐ No

---ADDITIONAL INFORMATION---

Ownership Type: ☐ Independent ☐ Franchise ☐ Branch ☐ School ☐ Government

Floor Space (sq.ft.):
Is this an Estimate: ☐ Yes ☐ No

Does Your Business Export: ☐ Yes ☐ No
If "No" [above], are you interested in Exporting? ☐ Yes ☐ No
Is this the Canadian Head Office: ☐ Yes ☐ No
If "No" [above], list Head Office location:
Province (if in Canada)
Country (if outside Canada)

Year Established:
Years at Current Location:
Previous Municipality (if applicable):

Coding Section: (Completed by York Region staff) Interviewer Initials: Business ID:
Industry Code NAIC: Traffic Zone: Off-site:
Secondary NAIC: This Update: Volunteers:

Please return completed form to:
York Region Planning Department
17250 Yonge Street, Newmarket, Ontario L3Y 6Z1
Fax: (905)954-4607 --- E-mail: businessdirectory@region.york.on.ca

Where available, businesses were also given a printout of their previous York Region on-line business directory listing.

Within each traffic zone all businesses were directly contacted and details about business activity, changes in employment levels and contact information were updated for businesses first recorded in 1998, or initiated for businesses new to that area. Where records showed a business that was no longer at the address in 2003, efforts were made to contact the business by phone to establish either a new location, or to record the probable closure of the business. For businesses unable or unwilling to conduct a door-to-door interview, the option was given to either have a surveyor call them at a mutually convenient time or to provide them with a blank survey form and have them complete and return it at their leisure. For businesses that declined to participate or were unable to contact either in person or by telephone, it was assumed that all information relating to that business remained unchanged from the date they were last surveyed.

Business information was also obtained from businesses outside of selected traffic zones that were interested in being included in the York Region Business Directory. This information was received from online submissions via our corporate website, facsimile submissions or e-mail messages.

Lastly, information on new businesses or pending developments not accounted for through regular data collection means was obtained from economic development offices of the various area municipalities and/or local chambers of commerce and boards of trade.

Data Sources and Limitations

Data Accuracy

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

Data collected was based on responses received from selected businesses. In certain instances however, businesses refused to participate, had a language barrier, had 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.

In addition, as described previously, the employment survey concentrated on businesses located in designated employment areas as defined by regional and municipal official plans. Consequently, certain industry sectors may be under-represented in areas where the employment mix within an employment area is not representative of the overall employment mix for a given municipality or for York Region as a whole. For example, many older retail areas in York Region are not necessarily located within designated employment lands. As a result, information on retail services may be underrepresented.

While this study analyzes employment patterns in a given area, 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, existing space inventories and vacancies, among others. 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.

Employment Data as a Measure of Economic Activity

The most frequent method of measuring economic activity within a given area is usually through an analysis of the Gross Domestic Product (GDP) of that area. Generally speaking, GDP is a measure of the value added by labour and capital within a country or economic region in transforming inputs purchased from other industries into outputs. Productivity gains are important to a local economy, as they influence how competitive an economy is, and thus are an important factor in the long-term health of a regional economy. However productivity data such as the GDP is difficult to obtain at the regional level. For competitive reasons, many businesses are not prepared to divulge information about investment, sales, and profit without legally binding non-disclosure agreements. Further, while Statistics Canada collects productivity data, it is only reported at the national, provincial, or Census Metropolitan Area (CMA) level.

As a result, employment data represents the most readily obtainable means of assessing trends in a regional economy. At the local level, businesses are usually much more agreeable in providing information about the number of people employed, although even this information is still sensitive. Furthermore, the employment rate is a meaningful measure insofar as regional government has objectives about employment for its citizens.

However caution should be noted when comparing GDP growth and employment growth, as an increase in GDP will reflect both an increase in employment and an increase in productivity. Employment data alone, on the other hand, has some limitations as a measure of economic activity, as growth in the number of employees does not necessarily translate into added wealth. For example, a group of five employees in one sector may be far more productive that five employees in another sector in that regard. In addition, increased automation may result in increased productivity but could have a minimal, or even negative, impact on employment. Finally, while employment is a useful indicator of economic activity, turning points in employment tend to lag turning points in the business cycle. As a result, changes in economic conditions may have already occurred before they translate into a shift in employment.

Appendix B: Industrial 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 US 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 13 sectoral categories in the discussion for clarity of presentation. The combined sectoral categories are summarized below:

Primary Industries (NAIC sectors 11, 21)
Includes all agricultural activity, forestry, fishing, hunting, mining, oil and gas extraction and related support activities.

Utilities (NAIC sector 22)
Includes electric power generation, transmission and distribution, natural gas distribution and water, sewage and other systems.

Construction (NAIC sector 23)
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 (NAIC sectors 31-33)
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.

Wholesale Trade (NAIC sectors 41)
Includes all wholesale distributors, product agents and brokers.

Retail Trade (NAIC sectors 44-45)
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 and Utilities (NAIC sectors 48-49)
Includes passenger and freight transportation and related support activities (e.g., airports, bus stations, vehicle towing), oil and gas pipelines, postal and courier services, warehousing and storage, electric and gas utilities and water and sewerage systems.

Finance, Insurance and Real Estate (NAIC sectors 52, 53)
Includes 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.

Business Services (NAIC sectors 54, 55, 56)
Includes legal services, accounting, architectural and engineering services, graphic and industrial design, computers systems design, management and human resources consulting, research and development services, advertising and marketing, photography and veterinary services, management of companies and enterprises, office administration and facilities support services, temporary help and employment services, business support services (e.g., telephone call centres, collection agencies), travel agencies and tour operators, investigative and security services, building maintenance services (e.g., pest control, janitorial services, window cleaning, landscaping), trade show services andwaste management and remediation services.

Education (NAIC sector 61)
Includes educational services (e.g., schools, colleges, training).

Health and Social Services (NAIC sectors 62)
Includes doctors, dentists, chiropractors, medical labs, ambulance services, hospitals, nursing and long-term care facilities, social services and child day-care services.

Personal services (NAIC sectors 51, 71, 72, 81)
Includes publishing industries (e.g., newspaper, book and software publishers), motion picture and sound recording industries, TV and radio broadcasting, telecommunications services, information services (e.g., news syndicates, libraries, internet providers), data processing services, 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, hotels and motels, restaurants and bars, caterers, repair and maintenance services (e.g., automotive repair, machinery repair, reupholstery), personal care services (e.g., hair care, funeral homes, laundry services, photofinishing), religious organizations and other civic and professional organizations.

Public Administration (NAIC sector 91)
Includes federal, provincial, regional and municipal protective (e.g., fire, police, courts and correctional facilities), regulatory and administrative services.

For more information on businesses in York Region, contact an economic development officer or a chamber of commerce.

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