

# 2023 Employment Survey Report

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## Introduction

The City of Guelph Employment Survey is an annual in-person survey of business establishments located in the city's industrial, commercial, and institutional zones.

The objective of the employment survey is to build a robust, local business database that can be used to:

- **Inform economic development programming** – target support to meet the needs of businesses locally
- **Inform growth planning** – measure the progress on meeting provincial growth targets and guide municipal planning policies
- **Target connections to business support** – match businesses with the programs that apply to them
- **Facilitate outreach and engagement** – improve the connectivity of businesses with municipal matters that impact them
- **Measure economic trends** – better understand the makeup and health of Guelph's economy

## 2023 Key insights

At the conclusion of the 2023 survey, the City's economic development database consisted of 3,505 establishments in Guelph's industrial, commercial, and institutional zones. The survey team visited 2,405 business establishments in 2023.

- 1,710 of these businesses participated in the 2023 survey
- 575 of the surveys were fully completed, with all priority information collected
- 71 per cent of all surveys conducted gathered employment information
- 216 new business establishments were added to the database
- Four of Guelph's 10 largest employers completed a survey
- 35 businesses requested information or services while completing the survey



# Building a comprehensive local business database

When fully engaged, the employment survey is expected to yield a comprehensive dataset that will provide an accurate snapshot of Guelph’s economy.

The program’s baseline year created a basic record for all business establishments in Guelph’s industrial, commercial, and institutional zones. Each subsequent survey year is expected to improve the comprehensiveness of the business database.

A survey dataset is determined to be comprehensive when:

- 90 per cent of establishments had a survey attempted
- 80 per cent of surveys attempted are conducted
- 50 per cent of surveys conducted are complete
- 100 per cent of Guelph’s ten largest employers completed a survey

## Measuring the employment survey

The following rates define the totality of the data collected in the survey and how this data informs the data set held in the database.

### Surveys attempted

The employment survey program runs between May to August each year. Employment zones are categorized by employment density, with higher-density zones being surveyed first to attempt as many surveys as possible within four months.

The percentage of Guelph establishments where a survey was attempted is measured through the **contact rate**.

### Surveys conducted

Best efforts are made to engage every Guelph business establishment to complete a survey. While businesses are approached in person as a first touchpoint, surveys can be completed online or by phone.

The percentage of surveys conducted out of those attempted is measured through the **submission rate**.

### Surveys completed

The employment survey collects business information about building information, contact preferences, demographic information, legal structure, and workforce. Additional questions may be added to the employment survey annually to align with the City’s strategic planning and engagement activities. In 2023, businesses were asked questions about their internal water systems to support the Water Smart Business program and were also provided an option to include sign up for the City’s downtown construction communication list.

The **completion rate** of the survey is measured by the number of surveys conducted that were able to gather the necessary priority information.

# 2023 Employment Survey

Due to resourcing impacts, the 2023 program ran in July and August with additional part-time support from September to December. In conclusion, the 2023 team attempted 2,405 surveys.

Table 1 and Figure 1 show the results and comparison of the 2023 survey to 2022. Although fewer surveys were attempted in 2023, the program was more successful in gathering priority information, with a completion rate of more than double that of 2022. Staff were able to analyze feedback from the baseline 2022 year and modified the approach to collecting the survey information in 2023; this included calling businesses ahead of time and wording questions to support clarity for respondents to solicit a better response.

In 2023, 216 more businesses were added to the database, bringing the total number of business establishments in Guelph to 3,505.

### Survey status types:

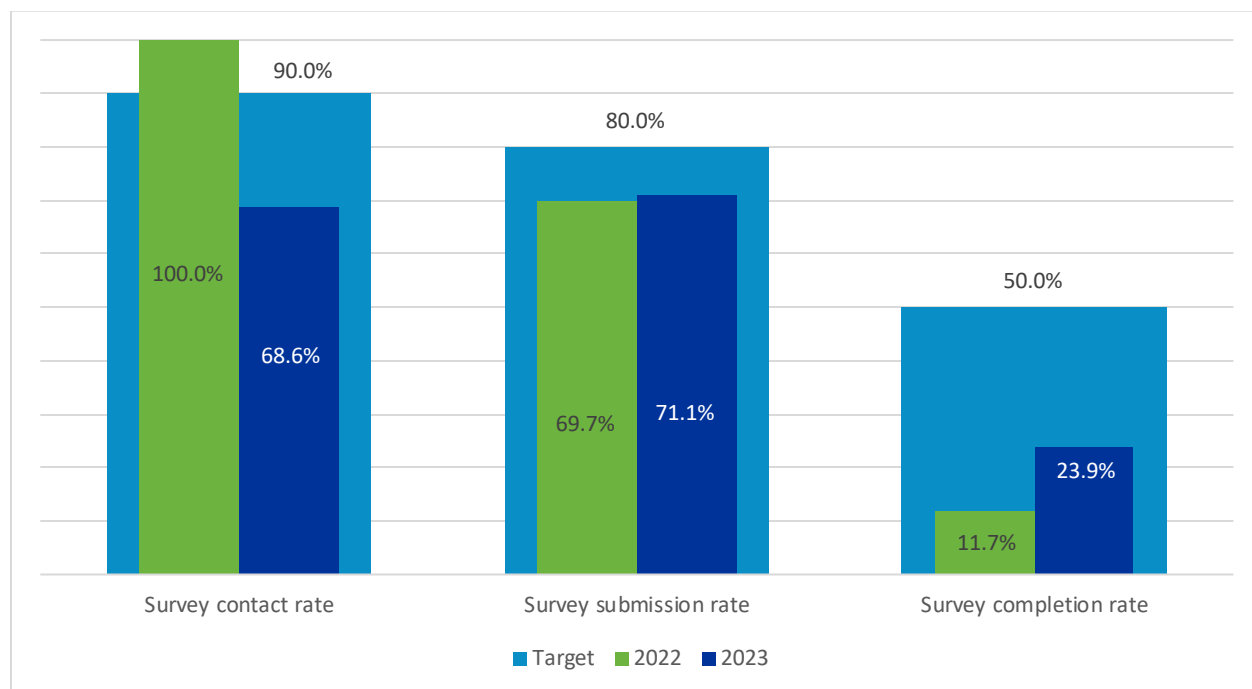
- **Complete** – All priority fields were collected
- **Partially complete** – Basic fields were collected or verified and additional information may have been collected, but not all priority fields
- **Not attempted** – Businesses were not visited in person

**Table 1: Survey completion status, comparison 2022 and 2023**

Survey completion	2022 (baseline)	2023
Attempted	3,289	2,405
Attempted: Complete	385	575
Attempted: Partially complete	2,904	1,830
Attempted: Survey conducted	1,906	1,135
Attempted: Opted out	379	440
Attempted: No response	619	255
Not attempted	0	1,100
New businesses in database	3,289	216
Total businesses in database	3,289	3,505

Source: City of Guelph Employment Survey, 2022 and 2023

**Figure 1: Survey comprehensiveness targets, comparison 2022 and 2023**



Source: City of Guelph Employment Survey, 2022 and 2023

## 2023 Survey effectiveness

While the 2023 employment survey did not attempt as many surveys as 2022, it is worth noting that of the surveys that were conducted, the percentage of information collected increased; apart from ownership type, where there was a minor drop. In addition, 23 per cent of surveys that were conducted collected priority data, which is 190 more surveys than 2022.

Businesses that participated in the employment survey were provided an option to request a follow up from an Economic Development Officer or City staff member. In 2023, 35 businesses requested information or services while completing the survey; themes included waste pick-up, public transit, downtown safety concerns, and building accessibility.

**Table 2: Information types collected, comparison 2022 and 2023**

Survey section	2022 (baseline)	2023
Email contact	651	838
Employment	1,415	1,220
Year established	1,277	1,129
Ownership demographics	243	251

<b>Survey section</b>	<b>2022 (baseline)</b>	<b>2023</b>
Business structure (nonprofit, sole proprietor, partnership)	1,490	1,186
Ownership type (single location, branch, etc.)	1,740	1,278
<b>Total surveys conducted</b>	<b>2,291</b>	<b>1,710</b>

Source: City of Guelph Employment Survey, 2022 and 2023

## **Priority information**

### **Contact**

Business owner contact information is one of the most important data sets collected through the employment survey. An up-to-date business contact list makes the work of the City more effective. It enables the City to relay essential business information pertaining to specific business sectors, such as training, financial incentives, and other support. Contact information also allows the City to engage business owners on municipal matters that could impact business operations. Table 2 and Figure 2 show that in 2023, 187 more emails were collected over 2022, for a total of 838, 20.6 per cent higher than the previous year.

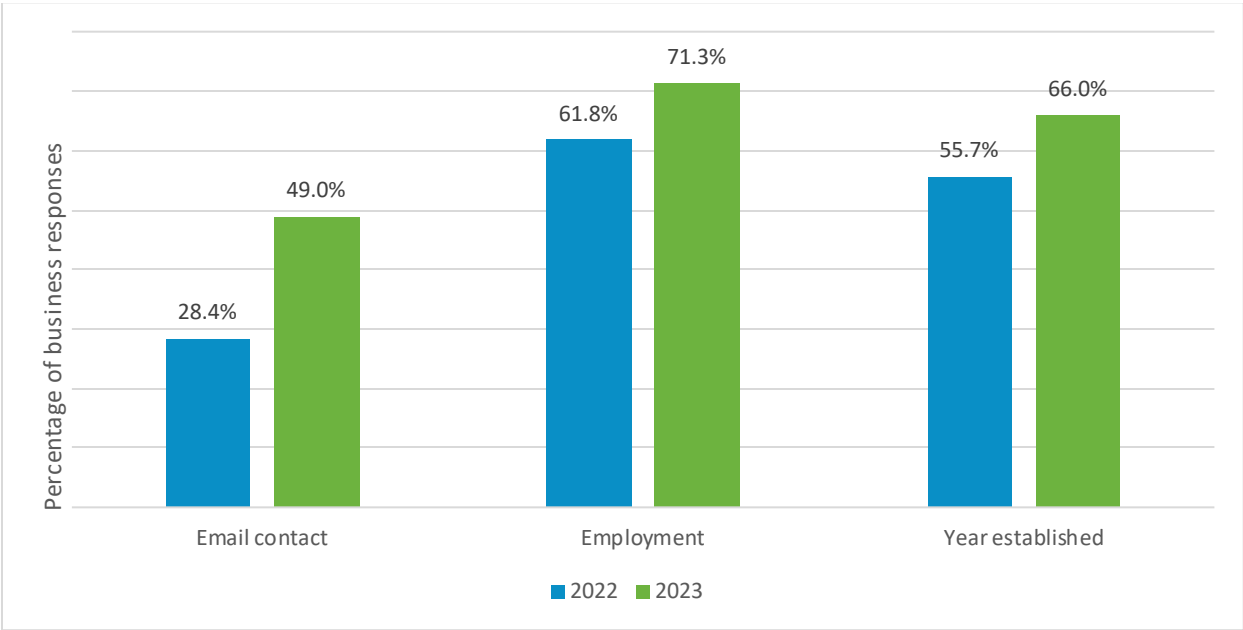
### **Employment**

Understanding where employment is growing or declining is an important measure of economic health. The City uses employment information to gain insight into the progress being made to meet Provincial targets and guides how we plan for growth. Signals and trends in employment can help us understand how the use of new technologies or hybrid work arrangements impact the size of workspaces needed by Guelph's future workforce. Figure 2 shows an increase in responses with 71 per cent (1,220) of the business establishments providing employment information, this is 10 per cent more than in 2022.

### **Year established in Guelph**

Determining what year a business was established and how long they have been operating in Guelph is important to determine business resiliency. Figure 2 shows that 66 per cent (1,129) of all establishments who conducted a survey, provided the date they established in Guelph, this is also up ten per cent from 2022.

**Figure 2: Priority survey information collected, comparison of 2022 and 2023**



Source: City of Guelph Employment Survey, 2022 and 2023

**Other information**

**Ownership demographics**

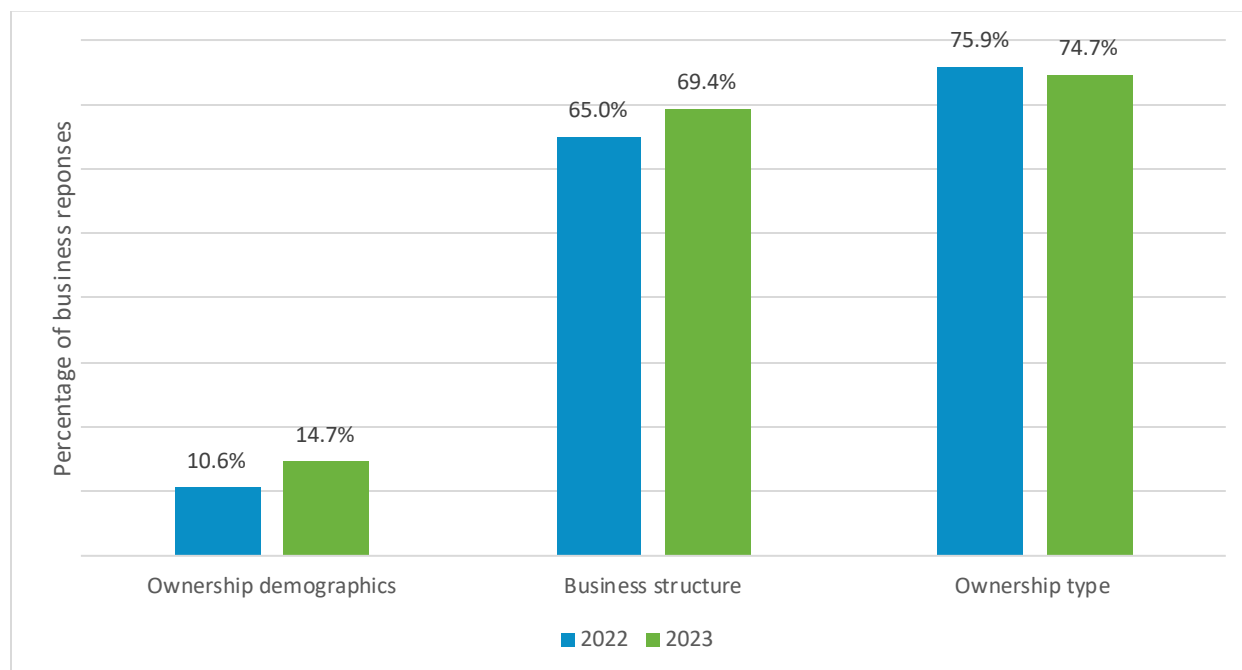
Business ownership demographics collected through the employment survey provide insight into the diversity of Guelph’s entrepreneurs and allow staff to target communication of business programming to those who may qualify. As noted in Figure 3, ownership demographics is the section with the lowest number of responses. While still up from 2022, only 14 per cent, or 251 establishments conducted having collected demographic information. A goal of the 2024 survey is to communicate the importance and positive impact of collecting this information.

**Business structure and ownership type**

Collecting information about business structure and ownership type helps us to understand how business owners, whether they be franchisees, sole proprietors, or corporations, are entering the market. This section of the survey is well received, with over 65 per cent of surveys conducted having collected this information in 2022 and 2023.



**Figure 3: Other survey information collected, comparison 2022 and 2023**



Source: City of Guelph Employment Survey, 2022 and 2023

## Database results and trends

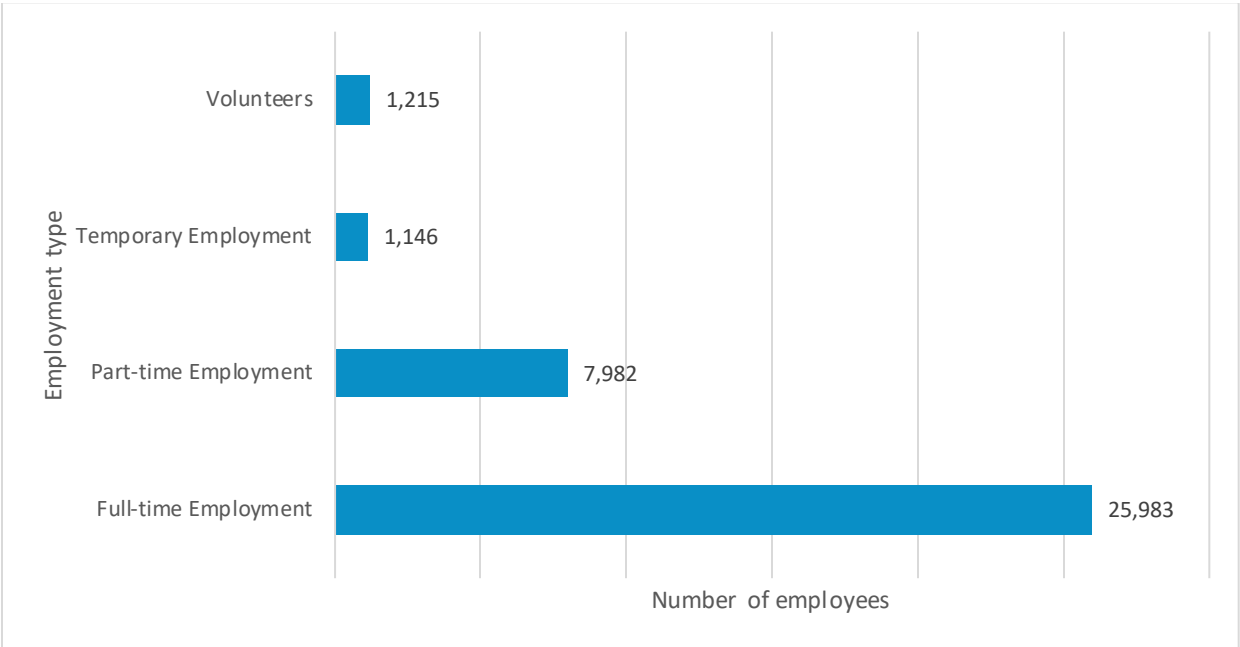
The 2023 survey did not result in a completed dataset; however, the information collected builds upon the baseline year and significantly contributes to the City's overall business database. As the survey's effectiveness improves, we can effectively measure trends and cross-reference external datasets to provide more accurate insights into the community's overall economic health.

## Employment

The employment data gathered through the survey includes total employees broken down by type. Gathering information about full-time, part-time, and temporary employment is useful for understanding how the local workforce has changed over time; for example, more consistent full-time employment in a specific sector can indicate growth. This information also provides insight into what initiatives should be explored with secondary and post-secondary institutions and what the future workforce can expect.

Figure 4 shows that of the 1,220 business establishments that provided employment information, 25,983 full-time employees, 7,982 part-time employees, and 1,146 temporary or contract employees were recorded; 1,215 volunteers were also recorded.

**Figure 4: Number of employees by employment type, 2022 and 2023 survey results**

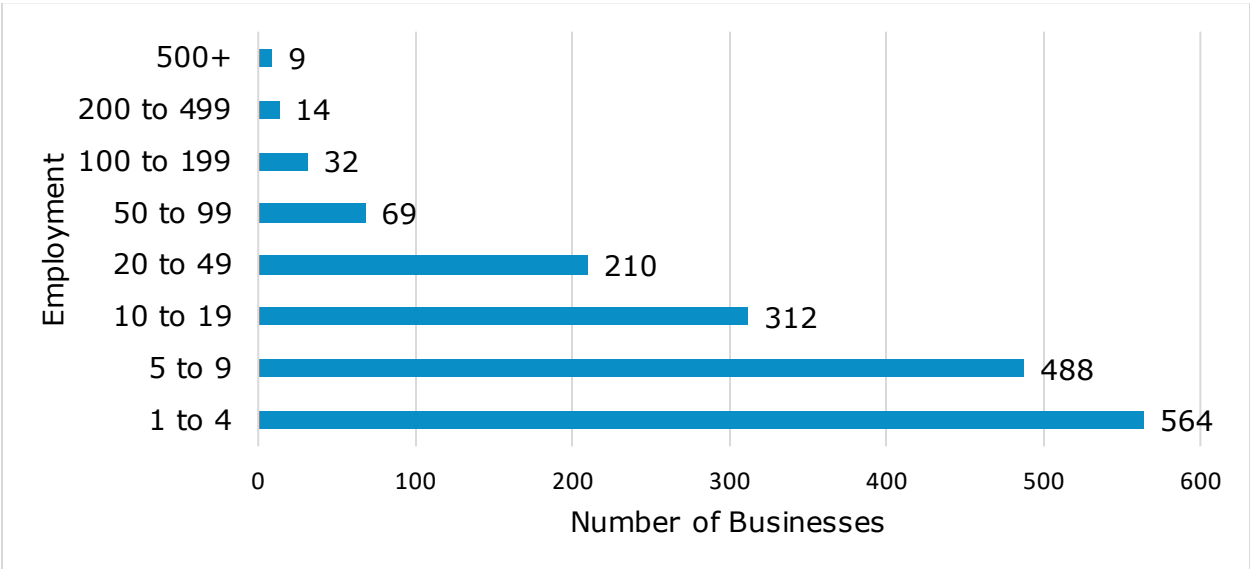


Source: City of Guelph Employment Survey, 2022 and 2023

The opportunities and challenges for businesses of different sizes and sectors can be drastically different, so understanding the density of the local economy is important to ensure that support programs match employers' needs.

Figure 5 shows that the largest proportion of businesses that have provided employment information are small businesses (less than 10 employees), and the smallest are large businesses. In 2023, four of Guelph's ten largest employers completed a survey.

**Figure 5: Number of businesses by employment size, 2022 and 2023 survey results**



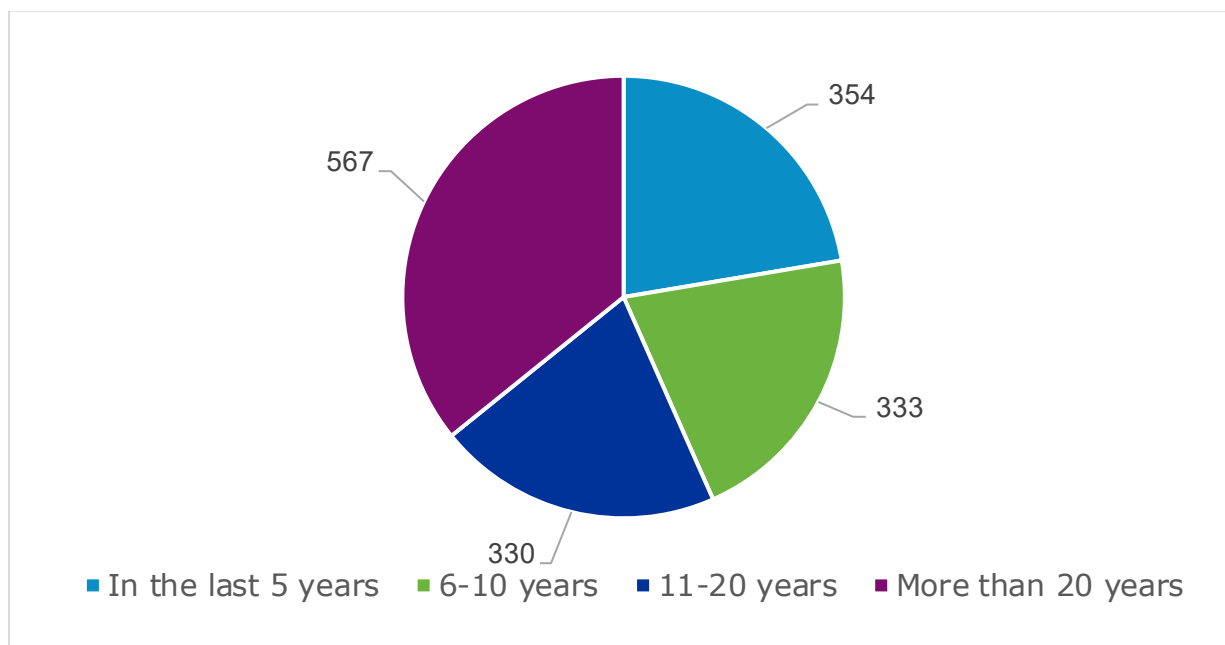
Source: City of Guelph Employment Survey, 2022 and 2023

More information on Guelph’s workforce statistics can be found at [guelph.ca/business](http://guelph.ca/business).

**Business longevity**

Over 60 per cent of business respondents provided the year they were established in Guelph. Of those 1,464 that responded to this question, 277 businesses opened between 2020 and 2023 during the COVID-19 pandemic and recovery period. Figure 6 also shows that 567 businesses have been open in Guelph for 20 years or more. It can be assumed that businesses that have been in operation for 20 or more years have established supply chains and a stable workforce and have been able to sustain themselves throughout different economic shifts. As the City looks to attract new businesses to Guelph through investment attraction initiatives, it will be important to focus those efforts on sectors that can support the foundational local economy.

**Figure 6: Length of business operation, 2023 survey results**

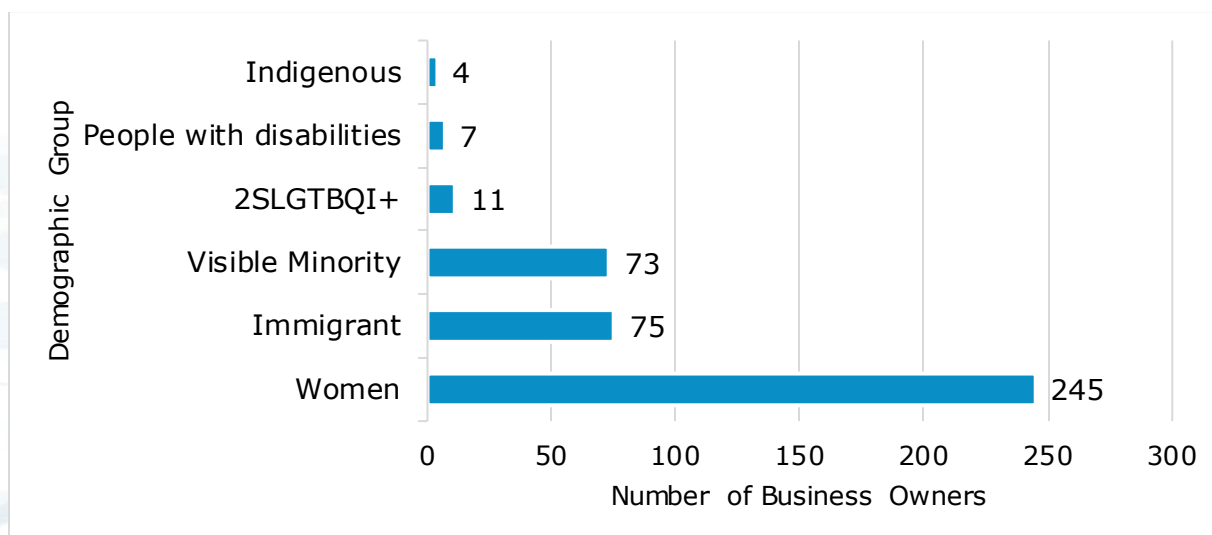


Source: City of Guelph Employment Survey, 2022 and 2023

### **Ownership demographics**

Figure 7 shows that out of the 344 business owners who shared information relating to which equity group they associate with, women and immigrant business owners were the largest category. It is important to note that 56 business owners identified with multiple demographic types.

**Figure 7: Business owner demographic groups, 2023 survey results**



Source: City of Guelph Employment Survey, 2022 and 2023

## Sector categorization

During the 2023 survey, surveyors asked businesses to identify their operational activities to understand what types of products and services each business offers. After collecting the survey data, staff assigned each business a verified North American Industry Classification System (NAICS) code. By categorizing businesses into NAICS sectors, staff can identify groups of similar business operations and focus support on those similar sector needs. This data will also assist staff with identifying business clusters, which are geographical concentrations of businesses that require similar supply chain linkages and associated ecosystem supports. Table 3 shows the business sector categories as assigned after the 2023 survey. The largest concentration of individual businesses is in retail trade, other services, and accommodation and food categories.

**Table 3: Number of businesses in NAICS sectors**

Business sector classified by NAICS	Number of businesses
Retail Trade	687
Other Services	418
Accommodation and Food Services	414
Health Care and Social Assistance	363
Manufacturing	312
Professional, Scientific and Technical Services	253
Unclassified	170
Finance and Insurance	144
Educational Services	127
Construction	119
Arts, Entertainment and Recreation	99
Wholesale Trade	83
Administrative and Support, Waste Management and Remediation Serv	75
Real Estate	71
Transportation and Warehousing	58
Information and Cultural Industries	49
Public Administration	32
Agriculture, Forestry, Fishing and Hunting	14
Utilities	14
Management of Companies and Enterprises	3

\*The other services category includes specialized service businesses such as repair shops, personal care, funeral services, and laundromats.

Source: City of Guelph Employment Survey, 2022 and 2023

## Looking at 2024

Each year, the survey team provides an end-of-year presentation with recommended program improvements. Based on this feedback and survey results, the survey project manager sets targets for the following year's survey.

Based on 2023 survey program responses, there are three priorities for the 2024 Employment Survey:

- Large employers are the most difficult to contact and complete surveys. The 2024 survey will focus on a target of 80 per cent of Guelph's largest employers having completed a survey.
- Meet the 90 per cent completion rate by prioritizing businesses that were not attempted in 2023.
- Include new employment questions related to hybrid work environments.

## Economic Development and Tourism Strategy alignment

The Employment Survey fulfills the strategic direction of the Economic Development and Tourism Strategy (2022-2026):

Goal 1: Expand support for existing businesses

Priority 1.1: Implement a formalized business expansion and support program

Action: Establish an employment survey program to obtain vital business intelligence and analysis to identify potential industry trends and report key findings.

### Supporting projects

Customer Relationship Management (CRM) system

Business Visitation Program

Labour Force Survey reports

## **Glossary of terms**

**Attempted survey:** A survey team member visited a business establishment in person

**Basic record:** A record of a business establishment's operating name, location, and NAICS code

**Business establishment:** An operating business with a brick-and-mortar location

**Completion rate:** Completed surveys divided by submitted surveys

**Completed survey:** Priority information was collected (contact information, employment information, and year established)

**Contact rate:** Surveys attempted divided by business establishments

**Economic development database:** the City of Guelph's database of local business information.

**North American Industry Classification System (NAICS) Codes:** An industry classification system developed by the statistical agencies of Canada, Mexico, and the United States

**Not attempted survey:** A survey team member did not visit a business establishment in person

**Opted out:** A survey was attempted, and the business establishment chose not to participate

**Partially completed survey:** Only partial information was collected, including at least the operating name, location, and NAICS code of the business

**Priority information:** Employment, contact information and year established

**Submission rate:** Completed or partially completed, divided by surveys attempted

