

# SASKATOON EMPLOYMENT TRENDS

# EMPLOYMENT *Profile*

## 2017



## Report Highlights

The Employment Profile presents employment statistics and trends in relation to the population, commuter flows, business activity and scale, industry sectors and geographic distribution across the City.

- In 2016, total employment in Saskatoon was estimated to be 129,382, which is a 10% increase since 2011 (117,210).
- Total labour import (those who are employed within the City but who reside elsewhere) has increased by 6,080 workers or by 60% between 2011 and 2016.
- The neighbourhoods that experienced the highest level of employment growth, from 2011 to 2016, were Blairmore at 76%, Lakewood at 41% and University Heights at 33%.
- In 2016, 70% of all licensed commercial businesses had fewer than 10 employees.
- The construction sector experienced a 26% increase in employment from 2011 to 2016.

- The retail trade sector has the greatest number of employees at 18,191.
- 35% of all home based business employees are associated with the construction sector, followed by the business and building support sector at 21%

The information presented in this report has been compiled by the City of Saskatoon, Community Standards Division, Business License Program. For clarity and ease of comparison, figures in this report have been rounded.

The Community Standards Division believes all information and sources in this publication to be correct. The user assumes any risk that may arise from the use of this information. The information contained in this publication is not copyright protected and may be used freely.

For more information pertaining to this report please contact the Community Standards Division, Business License Program.

## Table of Contents

<b>Definitions</b> .....	<b>3</b>	<b>Business &amp; Employment</b> .....	<b>10</b>
<b>Census Comparison</b> .....	<b>3</b>	<b>Commercial Business and Employment</b> .....	<b>10</b>
<b>Total Employment and Labour Force Activity</b> .....	<b>3</b>	Table 6: Business & Employment Totals by Suburban Development Area, 2011-2016 .....	10
Table 1: Total Employment, Census Population and Labour Force Activity, 2011-2016 .....	3	<b>Home Based Business</b> .....	11
<b>Place of Work Status</b> .....	<b>4</b>	Table 7: Home Business & Employment Totals by Suburban Development Area, 2016 .....	11
Table 2: Saskatoon Residents, Place of Work Status, 2011-2016 .....	4	<b>Commercial Businesses by Employee Numbers</b>	
<b>Mode of Transportation</b> .....	<b>4</b>	Figure 1: Number of Businesses by Employment Range, 2016 .....	12
Table 3: Mode of Transportation to Work, 2011-2016 .....	4	Figure 2: Percentage of Businesses by Employment Range, 2016 .....	12
<b>Inbound Commuters</b> .....	<b>5</b>	<b>Commercial Employment by Industry Sector</b> .....	<b>13</b>
Map 1: Inbound Commuter Flows, 2016 .....	5	Table 8: Businesses & Employment by Industry Sector, 2011-2016 .....	13
Table 4: Inbound Commuter Flows, 2011-2016 .....	5	<b>Home Based Employment by Industry Sector</b> .....	<b>14</b>
<b>Outbound Commuters</b> .....	<b>6</b>	Table 9: Home Based Businesses & Employment by Industry Sector, 2016 .....	14
Map 2: Outbound Commuter Flows, 2016 .....	6	<b>Growth Trends</b> .....	<b>14</b>
Table 5: Outbound Commuter Flows, 2011-2016 .....	6	Figure 3: Employment by Suburban Development Area, 2013 – 2016 .....	14
<b>Employment Density</b> .....	<b>7</b>	Figure 4: Employment of Licensed Commercial Businesses, 2001-2013 .....	15
<b>Distribution of Total Neighbourhood Employment by     Neighbourhood Boundary</b> .....	<b>7</b>	Figure 5: Total Number of Licensed Businesses and Institutional Agencies, 2001-2013 .....	15
Map 3: Distribution of Total Employment, 2016 .....	7	<b>Conclusion</b> .....	<b>16</b>
<b>Gross Distribution of Employment by Neighbourhood     Boundary</b> .....	<b>8</b>	Appendix A: Suburban Development Areas Map .....	16
Map 4: Gross Employment Density, 2016 .....	8		
<b>Net Distribution of Employment by Neighbourhood     Boundary</b> .....	<b>9</b>		
Map 5: Net Employment Density, 2016 .....	9		

## Definitions

**Commercial Space:** Any space where a licensed business, institutional agency or other such organization may operate, excluding residential locations.

**Gross Leasable Floor Area:** The amount of space within a building used by the business operation.

**Institutional Agency:** An organization that is not required to obtain a City of Saskatoon commercial business license, but occupies commercial, industrial or institutional space within the city. Examples of institutional agencies include provincial and federal government agencies, Saskatoon Health Region facilities, educational facilities, urban reserve properties, charitable and non-profit groups.

**Labour Force:** The population 15 years and older who are defined as either employed or unemployed. The employed are persons having a job or business, whereas the unemployed are without work, are available for work and are actively seeking work (Statistics Canada 2009).

**Licensed Business:** A business located within Saskatoon city limits holding a valid City of Saskatoon business license. In accordance with Business License Bylaw 8075, all businesses operating from a physical location within Saskatoon require a City of Saskatoon business license. This applies to all for-profit commercial, industrial and home based businesses in a permanent or fixed location.

**North American Industry Classification (NAICS):** A comprehensive system of categorizing businesses by type which was developed by the statistical agencies of Canada, the United States and Mexico to provide a common statistical framework and reporting standard to facilitate the comparative analysis of the three economies (Statistics Canada 2007a).

**Total Employment:** The daily net inflow of labour plus those who reported employment in Saskatoon at a usual place or worked at home. This total does not include those who reported no fixed workplace address as their employment location cannot be confirmed and may be located outside Saskatoon.

## Census Comparison

### Total Employment and Labour Force Activity

In 2016, total employment reported to the City of Saskatoon's Business License Program was 128,995. This figure is based on data gathered from 6,276 licensed commercial businesses and 978 institutional agencies.

**Table 1: Total Employment, Census Population and Labour Force Activity, 2011–2016**

	2011		2016
Employment (Based on Business License Data)	118,041		128,995
*Total Employment	117,210	▲ +10%	129,382
Total Population	222,246	▲ +11%	246,376
<b>Participating Labour Force</b>	<b>129,225</b>		<b>138,905</b>
Employed Labour Force	121,830		129,435
Unemployed Labour Force	7,395		9,470
Employment Ratio	.53	Employment Ratio is Total Employment divided by the Total Population. A 0.53 Ratio indicates 53 local jobs per 100 residents	.53
Net Labour Import	10,095	The daily net inflow of labour (defined as Labour Import less Labour Export) decreased by 1,265 workers from 2011 to 2016.	8,830

\* Total Employment is the daily net inflow of labour plus those who reported employment in Saskatoon at a usual place or worked at home. This total does not include those who reported no fixed workplace address as their employment location cannot be confirmed and may be located outside Saskatoon.

SOURCE: Statistics Canada, 2011 Census; Statistics Canada, 2016 Census; City of Saskatoon, Business License Program



### Place of Work Status

According to Census data, 97,990 Saskatoon residents travel to a regular workplace within Saskatoon. This figure does not include those who work at home. In addition, 15,745 employees have no fixed workplace address, which is typical of workers in the construction industry, this figure increased 9% from 2011 to 2016.

**Table 2: Saskatoon Residents, Place Of Work Status, 2011–2016**

Place of Work	2011	2016
Worked at Usual Place	102,130	106,560
Worked in Municipality of Residence	95,480	97,990
Worked in a Different Municipality Within the Same Census Division of Residence	2,655	4,545
Worked in a Different Census Division	2,715	2,820
Worked in a Different Province	785	760
Worked Outside Canada	220	300
No Fixed Workplace Address	14,490	15,745
Worked at Home	4,990	6,830

This table represents data collected by Stats Canada and does not correlate to the City of Saskatoon's data for Home Based Business employment. The City's Home Based Business data includes many of those who reported "No Fixed Workplace Address" to Stats Canada.



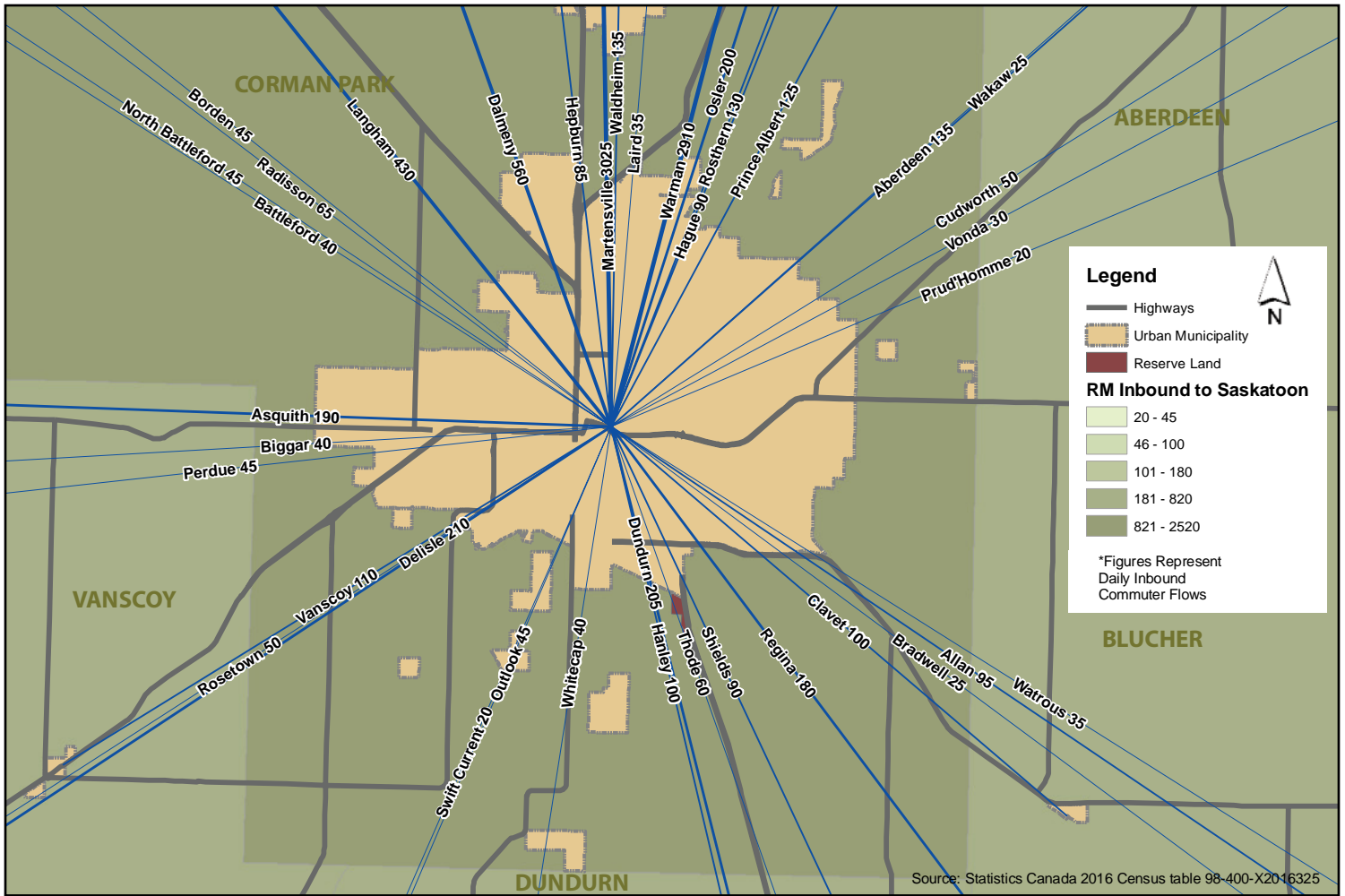
### Mode of Transportation

The Total Employed Labour Force that travel to a usual place of work or have no fixed workplace address increased by 10% since 2011. Of these employees, the large majority (82%) either travel to work by car, truck or van as either a driver or a passenger.

**Table 3: Mode of Transportation to Work, 2011–2016**

Mode of Transportation	2011	PERCENT CHANGE	2016
Total Employed Labour Force with a Usual Place of Work or no Fixed Workplace Address, Aged 15+	<b>116,620</b>	▲ +5%	<b>122,305</b>
By Car, Truck, Van as a Driver to Work	<b>92,665</b> 79%	▲ +6% Percent of Total Employed Labour Force	<b>98,390</b> 80%
By Car, Truck, Van as a Passenger to Work	<b>7,055</b> 6%	▲ +2% Percent of Total Employed Labour Force	<b>7,535</b> 6%
Walked or Bicycled	<b>8,760</b> 8%	▼ -5% Percent of Total Employed Labour Force	<b>8,295</b> 7%
By Public Transit	<b>5,915</b> 5%	▲ +5% Percent of Total Employed Labour Force	<b>6,225</b> 5%
Other Modes	<b>2,225</b> 2%	▼ -15% Percent of Total Employed Labour Force	<b>1,885</b> 2%

SOURCE: Statistics Canada, 2011 Census; Statistics Canada, 2016 Census



**Map1: Inbound Commuter Flows 2016**

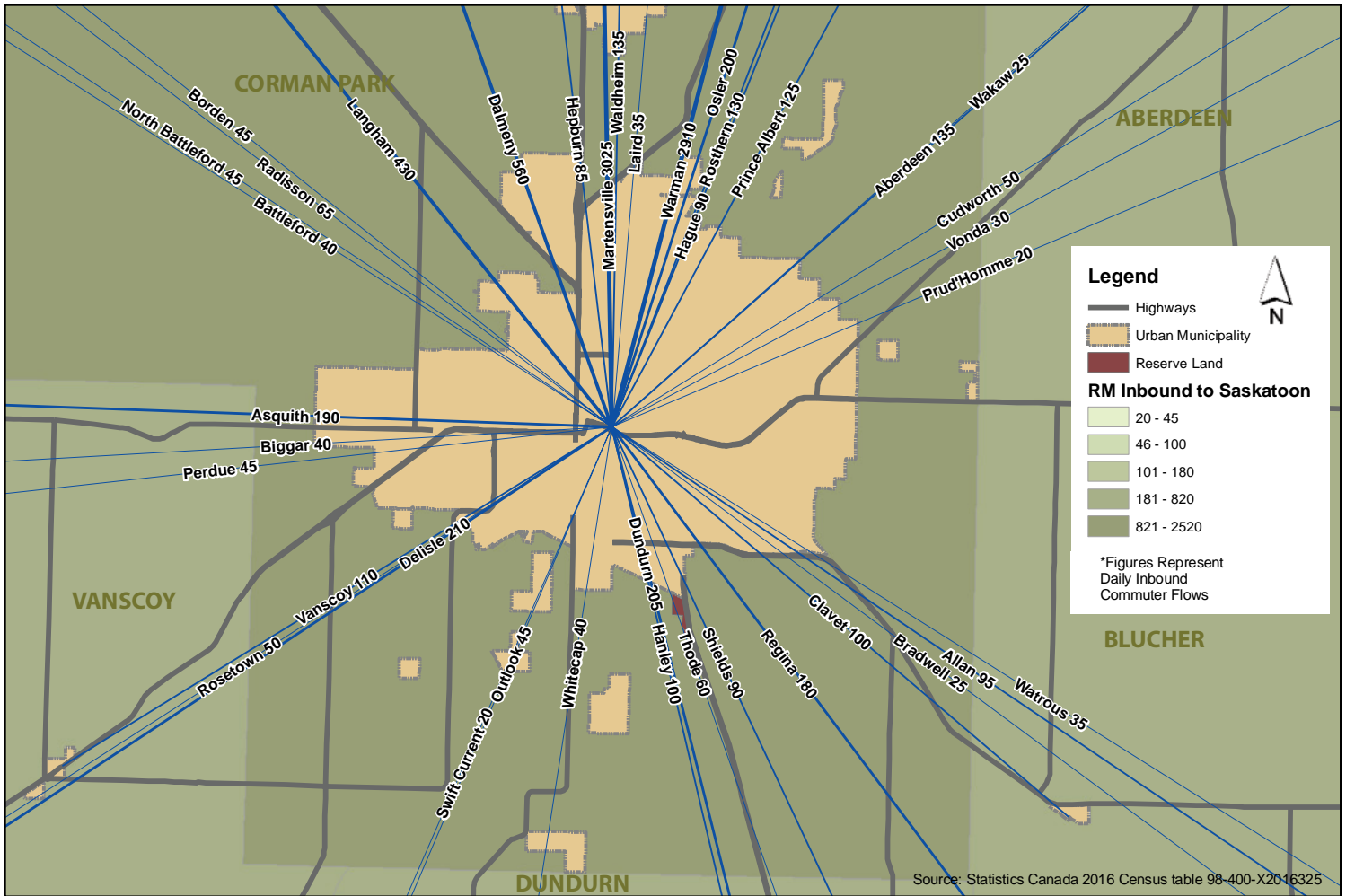
**Inbound Commuters**

The 2016 Census states that, in that year, a total of 16,175 workers commuted to Saskatoon from outside of the City for employment. This is a decrease of 565 workers, or 3.4%, since 2011. The neighbouring communities of Martensville and Warman make up 37% of the total Labour Import.

**Table 4: Inbound Commuter Flows, 2011–2016**

LOCATION	2011 INBOUND COMMUTERS	PERCENT CHANGE	2016 INBOUND COMMUTERS
Martensville, City	3,020	▲ +.1%	3,025
Warman, City	2,155	▲ +35%	2,910
Corman Park, Rm	2,785	▼ -10%	2,520
Blucher, Rm	440	▲ +14%	500
Delisle, Town	190	▲ +10%	210
Osler, Town	310	▼ -35%	200
Asquith, Town	200	▼ -5%	190
Prince Albert, City	140	▼ -11%	125
Aberdeen, Rm	375	▼ -64%	135
Vanscoy, Rm	No Data	N/A	110
Vanscoy, Village	150	▼ -27%	110
Clavet, Village	205	▲ +51%	100
Hepburn, Village	125	▼ -32%	85

SOURCE: Statistics Canada, 2011 Census; Statistics Canada, 2016 Census



Map2: Outbound Commuter Flows 2016

**Outbound Commuters**

The City of Saskatoon’s Labour Export reached 7,345 workers in 2016, an increase of 700 workers or 10.5% since 2011. The Rural Municipalities of Corman Park and Vanscoy received 38% of the City of Saskatoon’s total Labour Export.

Table 5: Outbound Commuter Flows, 2011–2016

LOCATION	2011 OUTBOUND COMMUTERS	PERCENT CHANGE	2016 OUTBOUND COMMUTERS
Corman Park, Rm	900	▲ +126%	2035
Vanscoy, Rm	685	▲ +7%	735
Warman, City	335	▲ +43%	480
Martensville, City	330	▼ -17%	275
Regina, City	260	▼ -25%	196
Whitecap, Reserve	255	▼ -12%	285
Blucher, Rm	195	▲ +292%	765
Vanscoy, Village	195	▼ -72%	55
Wood Buffalo, S.m.	150	▲ +30%	195
Prince Albert, City	135	▼ -22%	105
Dundurn, Rm	130	▲ +4%	135
Calgary, City	120	▼ -25%	90
North Battleford, City	95	0%	95
La Ronge, Town	70	▼ -50%	35

SOURCE: Statistics Canada, 2011 Census; Statistics Canada, 2016 Census

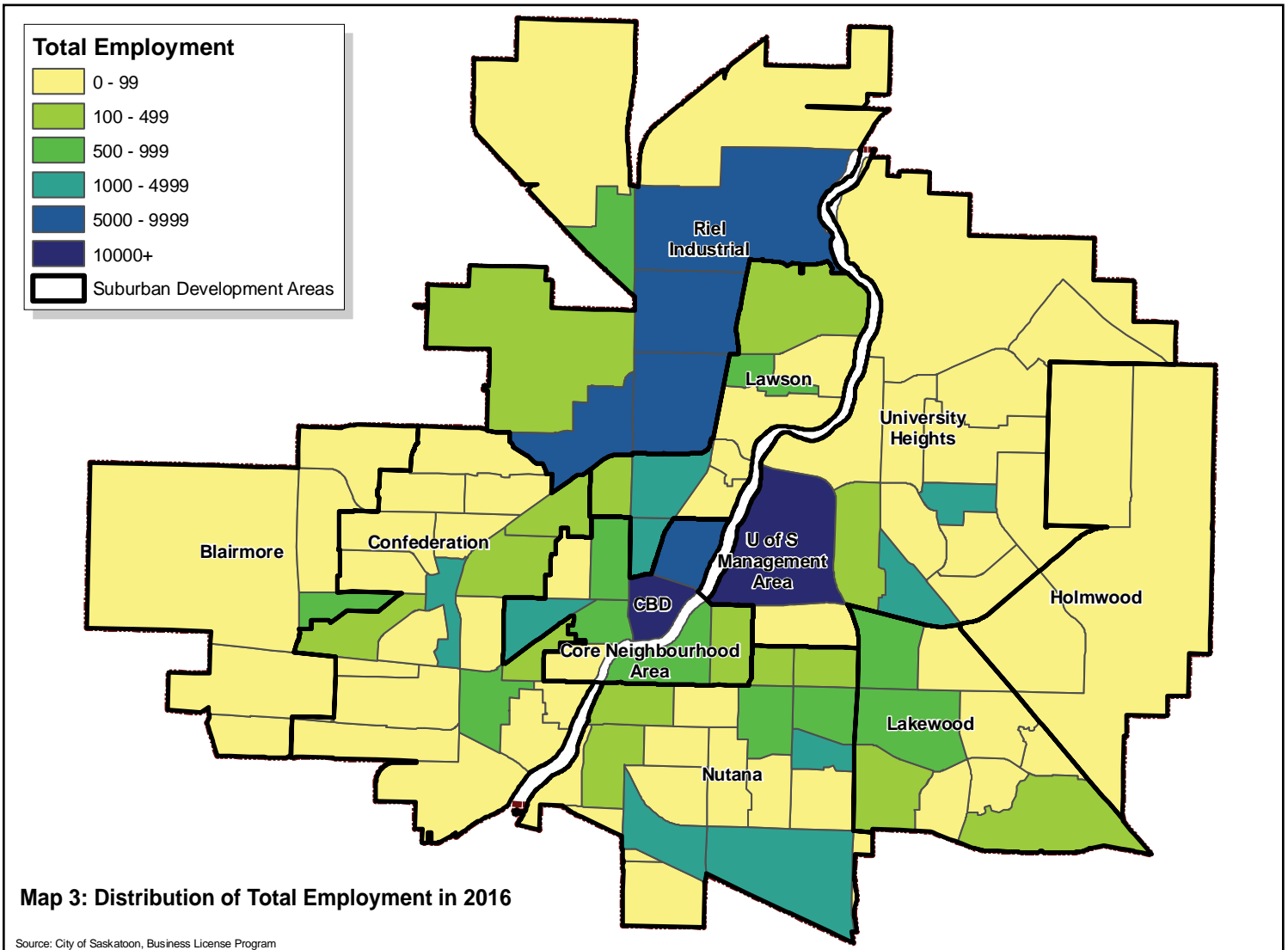




## Employment Density

### Distribution of Total Neighbourhood Employment by Neighbourhood Boundary

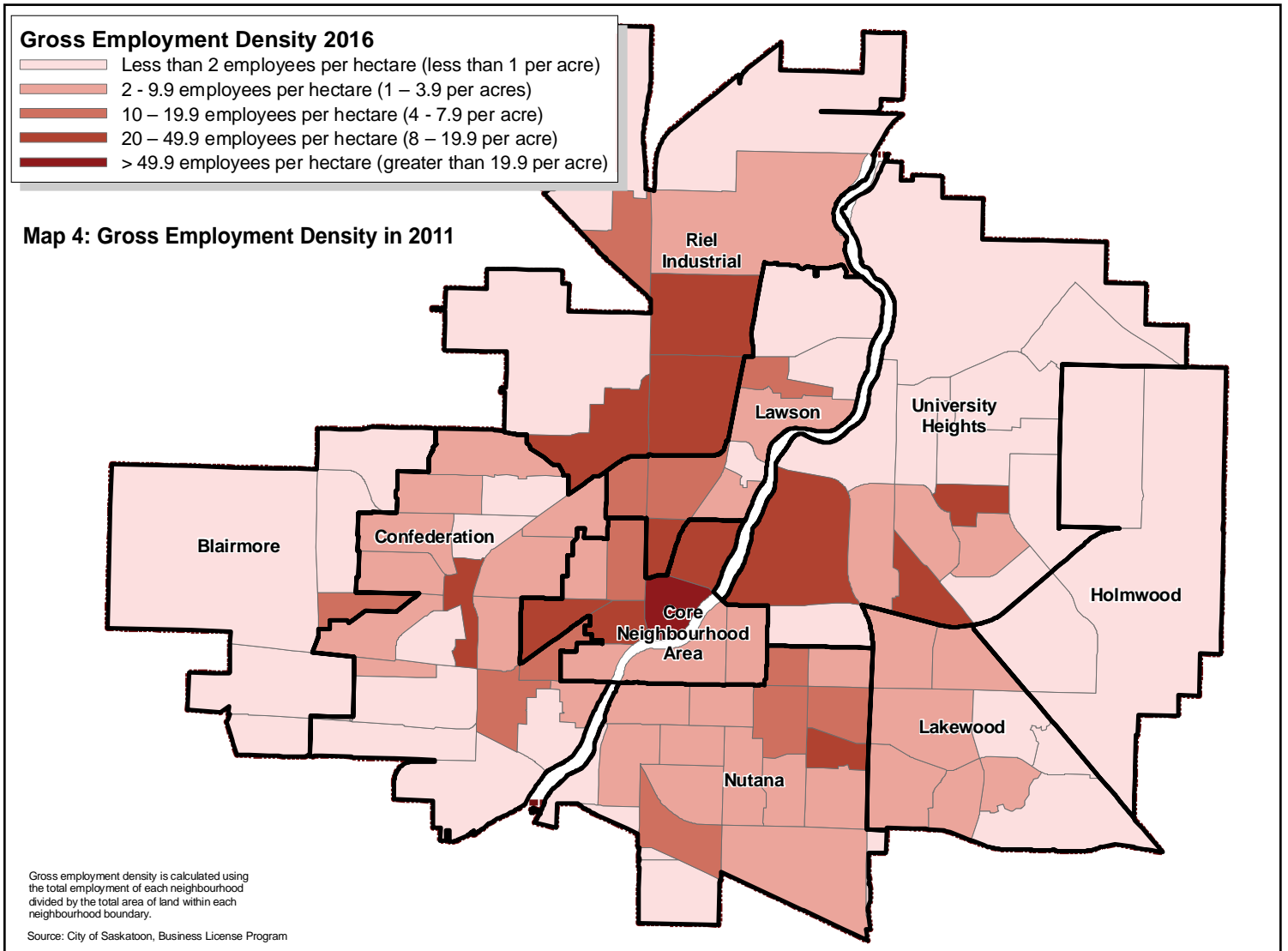
Long range planning in Saskatoon is organized within the context of nine suburban development areas. In order to provide a clearer understanding of business and employment characteristics, the two neighbourhoods with the greatest employment are considered independently from the suburban development area in which they are located. These two neighbourhoods are the Central Business District (located in the Core Neighbourhood Area) and the U of S Management Area (located in University Heights). See Appendix A: Suburban Development Areas.



Source: City of Saskatoon, Business License Program

**Gross Distribution of Employment by Neighbourhood Boundary**

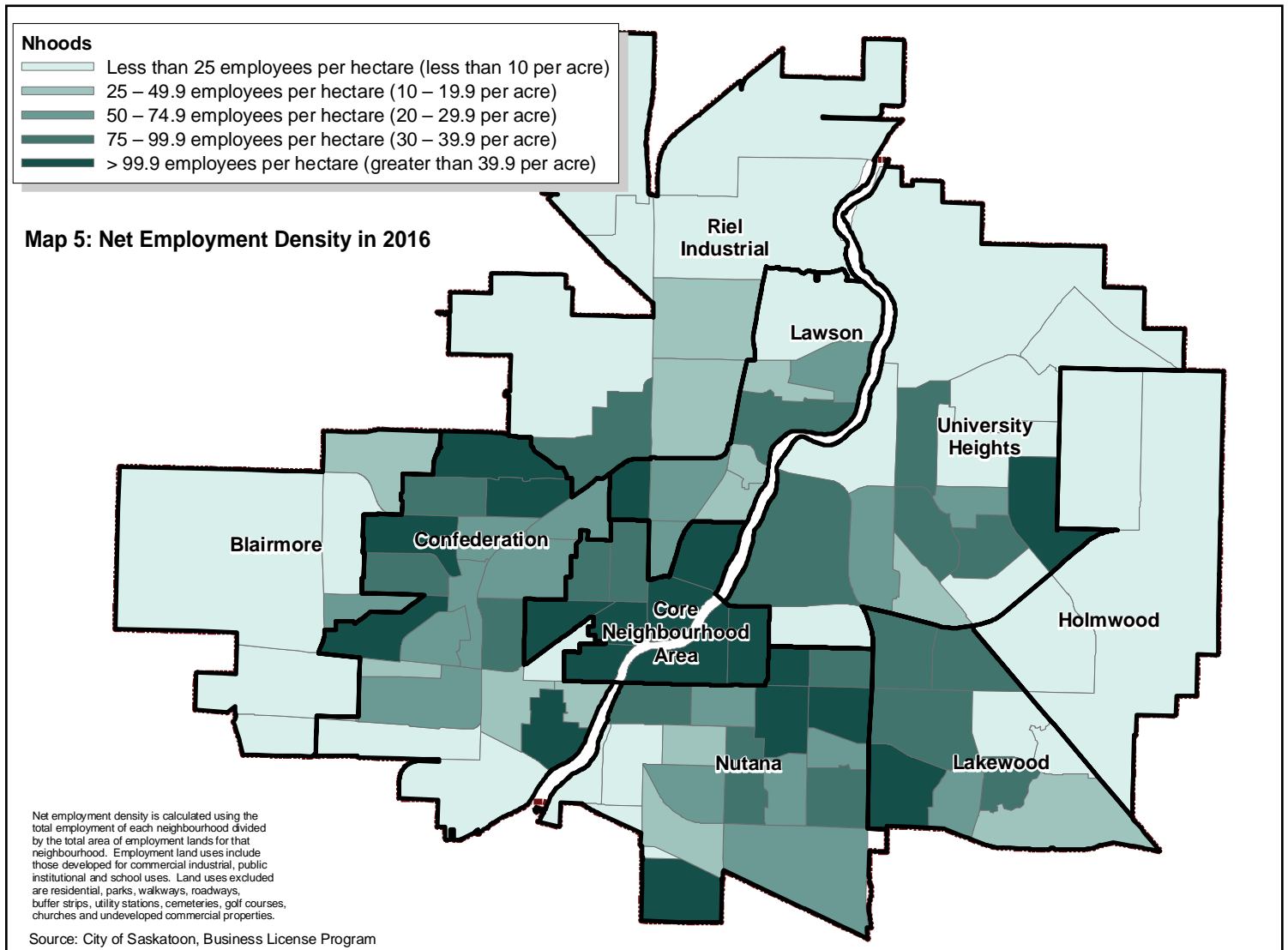
Gross employment density is calculated using the total employment of each neighbourhood divided by the total area of land within each neighbourhood boundary. Neighbourhoods with the highest gross employment density are the Central Business District with 158 employees per hectare, followed by the U of S Management Area with 36 and City Park with 35.





### Net Distribution of Employment by Neighbourhood Boundary

Net employment density is calculated using the total employment of each neighbourhood divided by the total area of employment lands for that neighbourhood. Net area includes only lands developed for commercial, industrial, public institutional and educational uses. Residential uses, parks, walkways, roadways, buffer strips, utility stations, cemeteries, golf courses, churches and undeveloped commercial properties are excluded. Neighbourhoods with the highest net employment density are Central Business District with 421 employees per hectare, followed by Hampton Village with 380 and Pleasant Hill with 324.





## Business & Employment

### Commercial Business and Employment Totals

In 2016, there were 7,254 businesses operating in Saskatoon. This includes all licensed commercial businesses and institutional agencies operating in institutional, commercial, industrial and specialized zoning districts. Data was collected from 6,276 licensed commercial businesses and 978 institutional agencies. Suburban development areas with the highest proportion of licensed businesses and institutional agencies are North West Industrial with 29% of the total number of businesses in Saskatoon, followed by Central Business District with 14% and Core Neighbourhood Area with 15%.

**Table 6: Businesses & Employment Totals by Suburban Development Area, 2011-2016**

Suburban Development Area	TOTAL BUSINESSES			TOTAL EMPLOYMENT		
	2011	2016	Percent Change	2011	2016	Percent Change
North West Industrial	1,845	2,094	▲ +13%	28,696	32,565	▲ +13%
*Central Business District	1,068	1,042	▼ -2%	20,137	18,940	▼ -6%
Core Neighbourhood Area	978	1,086	▲ +11%	12,865	14,563	▲ +13%
Nutana	777	904	▲ +16%	13,550	15,204	▲ +12%
Lawson	545	592	▲ +9%	7,690	8,136	▲ +6%
Confederation	413	471	▲ +14%	7,664	8,364	▲ +9%
University Heights	411	484	▲ +18%	5,797	6,383	▲ +8%
Lakewood	327	352	▲ +8%	4,437	4,968	▲ +12%
*U Of S Management Area	187	178	▼ -5%	16,363	18,397	▲ +13%
Blairmore	25	46	▲ +45%	842	1,409	▲ +67%
Holmwood	1	5	▲ +400%	0	66	–
<b>Total</b>	<b>6,577</b>	<b>7,254</b>		<b>118,041</b>	<b>128,995</b>	

\*NOTE: For a better understanding of business and employment characteristics, the two neighbourhoods with the greatest employment (Central Business District and U of S Management Area) have been assessed independently of the suburban development area within which they are located (Core Neighbourhood Area and University Heights). See Appendix A: Suburban Development Areas.

SOURCE: City of Saskatoon, Business License Program, 2011-2016



### Home Based Business

In 2016, there were 4,524 home based businesses operating in Saskatoon, representing a 18% increase since 2011. Suburban development areas with the highest proportion of licensed home based business employment are Nutana with 21%, followed by Confederation with 20%, University Heights with 18% and Lakewood with 16%.



**Table 7: Home Based Businesses & Employment Totals by S.D.A. in 2016**

SUBURBAN DEVELOPMENT AREA	NUMBER OF HOME BASED BUSINESSES IN 2011	NUMBER OF HOME BASED EMPLOYEES IN 2016
Confederation	944	1,789
Nutana	969	1,636
University Heights	816	1,352
Lakewood	727	1,288
Lawson	531	972
Core Neighbourhood Area	468	817
Central Business District	29	48
Blairmore	38	76
Holmwood	1	2
U Of S Management Area	1	6
North West Industrial	0	2
<b>Total</b>	<b>4,524</b>	<b>7,988</b>

\*NOTE: For a better understanding of business and employment characteristics, the two neighbourhoods with the greatest employment (Central Business District and U of S Management Area) have been assessed independently of the suburban development area within which they are located (Core Neighbourhood Area and University Heights). See Appendix A: Suburban Development Areas.

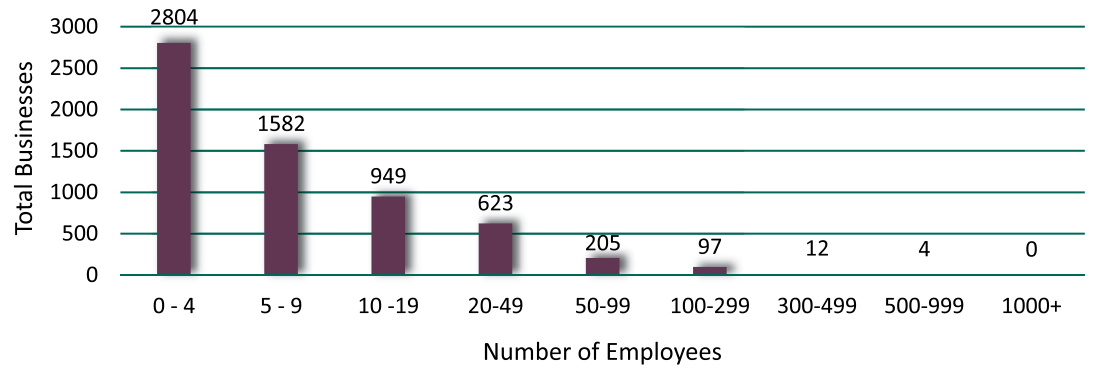
SOURCE: City of Saskatoon, Business License Program, 2016



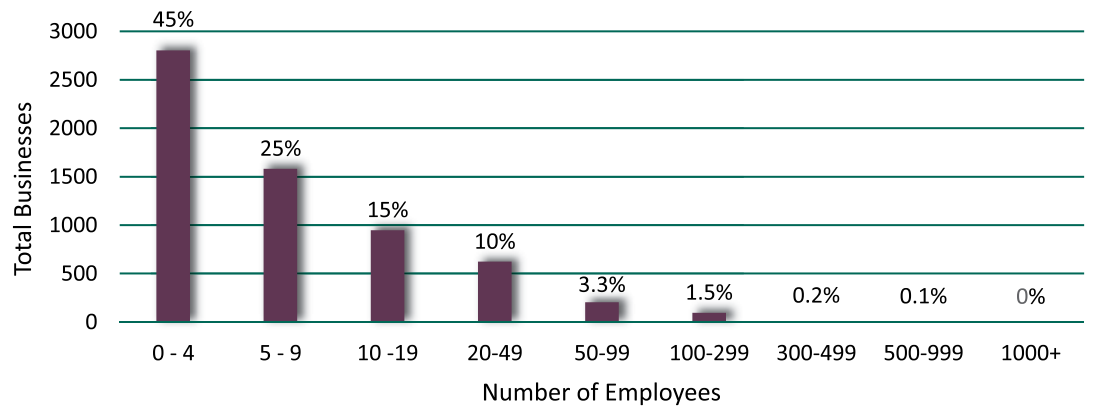
### Commercial Businesses by Employee Numbers

Saskatoon's business community is primarily made up of small business: 45% of all businesses have less than five employees, while another 25% have between five and nine employees.

**Figure 1: Number of Businesses by Employment Range in 2016**



**Figure 2: Percentage of Businesses by Employment Range in 2016**



### Commercial Employment by Industry Sector

Commercial and Institutional businesses can be divided into two major sectors: goods-producing and services-producing. Saskatoon's economy is primarily made up of businesses in the services producing sector, with Retail Trade and Other Services sectors accounting for 39% of all businesses. However, these two sectors account for only 19% of all employment. Industry sectors providing the highest proportion of employment are Retail Trade, Educational Services, and Health Care and Social Assistance making up 39% of the total employment.



Table 8: Businesses & Employment by Industry Sector, 2011-2016

INDUSTRY SECTOR	2011 TOTAL NUMBER OF BUSINESSES	PERCENT CHANGE	2011 TOTAL EMPLOYEES	2011 TOTAL EMPLOYEES	PERCENT CHANGE	2016 TOTAL EMPLOYEES
<b>Goods – Producing Sector</b>						
Manufacturing	368	▼ -5%	366	9,074	▼ -6%	8,559
Construction	420	▲ +27%	535	5,452	▲ +26%	6,895
Mining, Oil And Gas	34	▲ +11%	38	1,236	▲ +2%	1,214
Utilities	3	Nc	3	268	▲ +18%	315
Agriculture, Forestry & Fishing	12	▲ +33%	16	101	▲ +16%	117
Sub Total, Goods Producing	837	▲ +14%	958	16,131	▲ +6%	17,100
<b>Services – Producing Sector</b>						
Retail Trade	1,313	▲ +2%	1,327	17,385	▲ +4%	18,191
Educational Services	218	▲ +13%	247	13,611	▲ +7%	14,689
Health Care & Social Assistance	448	▲ +15%	518	14,650	▲ +20%	17,650
Accommodation & Food Services	590	▲ +16%	705	11,507	▲ +17%	13,680
Public Administration	192	▼ -10%	173	10,280	▼ -6%	9,696
Prof., Scientific & Tech. Services	537	▲ +13%	609	6,905	▲ +11%	7,725
Other Services	929	▲ +20%	1,115	5,969	▲ +15%	6,870
Finance, Insurance & Real Estate	439	▲ +6%	442	5,214	▲ +8%	5,621
Wholesale Trade	493	▲ +2%	505	5,037	▲ +19%	5,994
Transportation & Warehousing	184	▼ -5%	174	4,450	▲ +6%	4,476
Information, Culture & Rec.	226	▲ +21%	274	4,407	▼ -7%	4,078
Business & Building Support	185	▲ +12%	208	2,495	▲ +22%	3,045
Sub Total, Services-Producing	5,754	▲ +9%	6,297	101,910	▲ +10%	111,895
Total	6,591	▲ +10%	7,255	118,041	▲ +9%	128,995

### Home Based Employment by Industry Sector

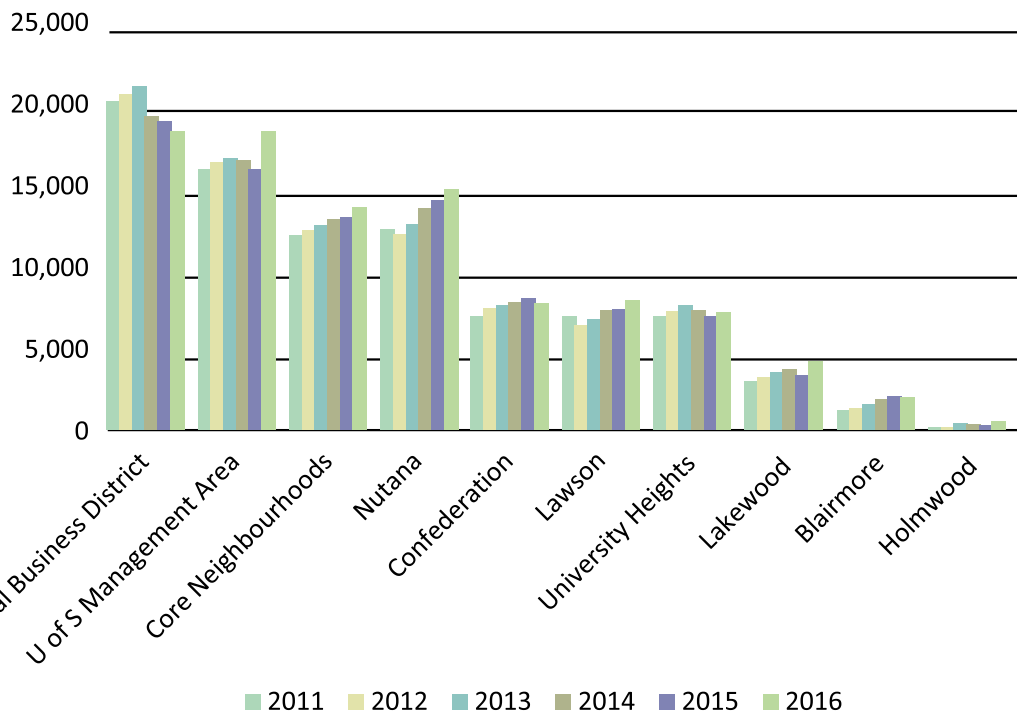
The home based business sector continues to experience strong growth and outpaces the commercial sector. The Construction industry makes up 31% of the total number of home based businesses and even a greater percentage of the total employment within the home based business sector at 35%. The next three leading sectors (Business & Building Support, Professional, Scientific and Technical Services and Other Services) combined make up 44% of the total home based business employment.

**Table 9: Home Based Businesses & Employment by Industry Sector in 2016**

INDUSTRY SECTOR	TOTAL NUMBER OF HOME BASED BUSINESSES IN 2016	PERCENT OF ALL HOME BASED BUSINESSES IN 2016	TOTAL EMPLOYEES IN 2016	PERCENT OF TOTAL EMPLOYEES IN 2016
<b>Goods – Producing Sector</b>				
Construction	1,413	31%	2,775	35%
Manufacturing	105	2%	155	2%
Mining, Oil and Gas	6	.1%	7	.1%
Agriculture, Forestry & Fishing	6	.1%	7	.1%
<b>Sub-Total, Goods Producing</b>	<b>1,530</b>		<b>2,944</b>	
<b>Services – Producing Sector</b>				
Business & Building Support	674	15%	1,632	21%
Prof., Scientific & Tech. Services	784	17%	1,106	14%
Other Services	585	13%	726	9%
Information, Culture & Rec.	160	4%	99	1%
Health Care & Social Assistance	112	2%	146	2%
Educational Services	152	3%	218	3%
Wholesale Trade	109	2%	181	2%
Transportation & Warehousing	117	3%	245	3%
Transportation & Warehousing	146	3%	188	2%
Retail Trade	97	2%	153	2%
Finance, Insurance & Real Estate	58	1%	179	2%
<b>Sub-Total, Services-Producing</b>	<b>2,994</b>		<b>4,873</b>	
<b>Total</b>	<b>4,524</b>		<b>7,817</b>	

### Growth Trends

Most of the suburban development areas have experienced employment growth since 2013, the largest being a 9% increase in the U of S Management Area. The North Industrial suburban development area has the largest proportion of Saskatoon’s total employment. Since 2013, this area has experienced an average annual employment growth rate in employment of 6%.



**Figure 3: Employment by Suburban Development Area, 2011- 2016**



Top Five Employment Growth Areas:	2013 Total Employees	Percent Change	2016 Total Employees
North West Industrial	30,798	▲ +6%	32,565
Central Business District	20,877	▼ -8%	19,118
U of S Management Area	16,872	▲ +9%	18,397
University Heights	6,624	▼ -4%	6,383
Lakewood	4,777	▲ +4%	4,968

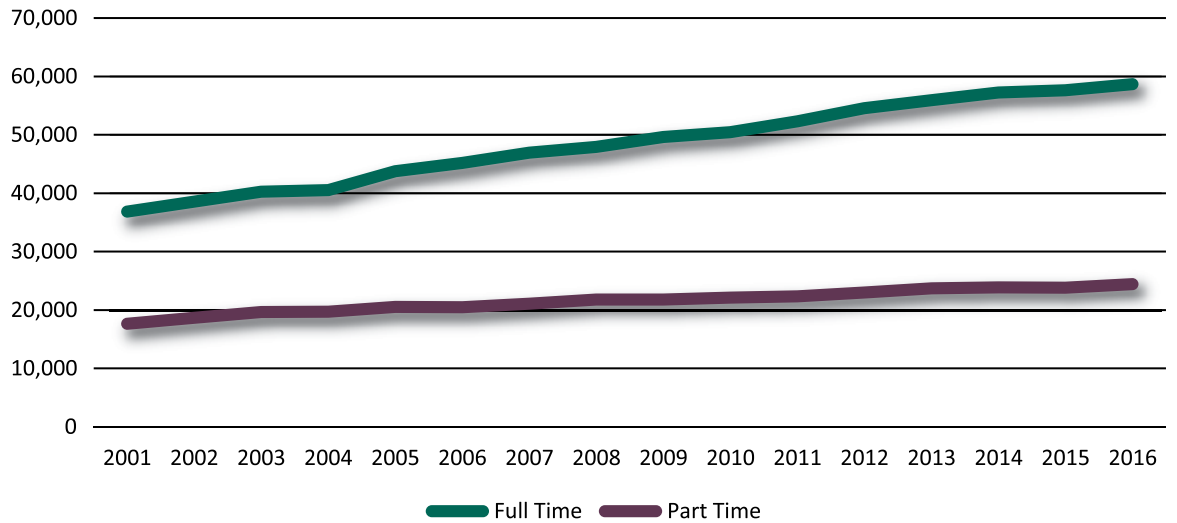
\*NOTE: For a better understanding of business and employment characteristics, the two neighbourhoods with the greatest employment (Central Business District and U of S Management Area) have been assessed independently of the suburban development area within which they are located (Core Neighbourhood Area and University Heights). See Appendix A: Suburban Development Areas.

SOURCE: City of Saskatoon, Business License Program, 2013-2016

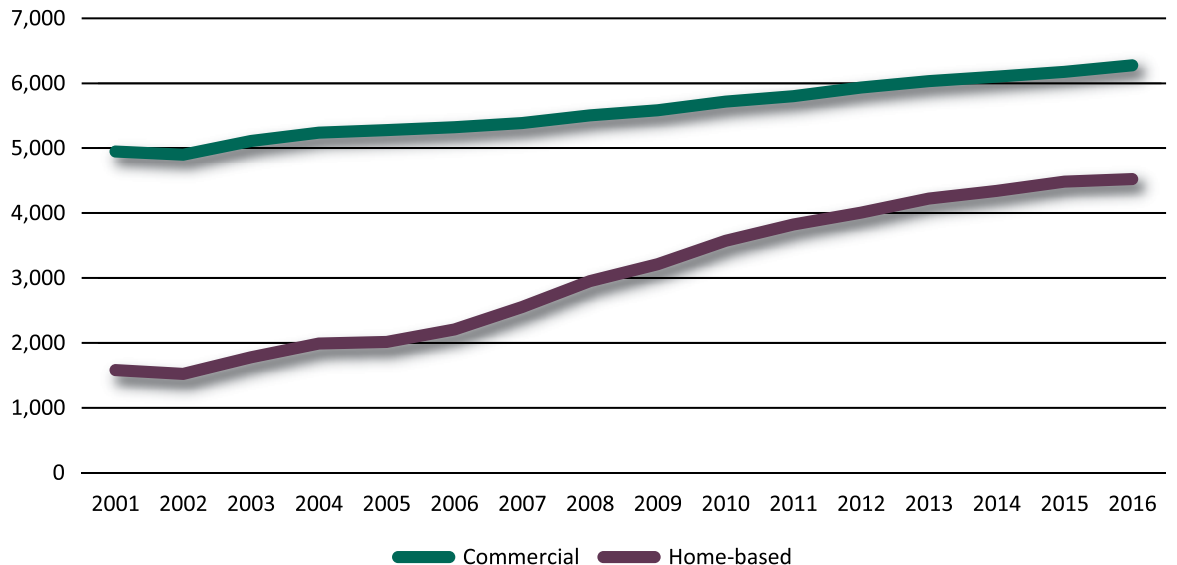
**Growth Trends**

Employment rates continue to show a steady increase. Since 2001, part time employment has remained relatively stable while full time employment has increased steadily. As identified in Figure 5, home based business growth continues to outpace commercial growth. Home based businesses comprised 42% of total licensed businesses by the end of 2016.

**Figure 4: Employment of Licensed Commercial Businesses, 2001–2016**



**Figure 5: Total Number of Licensed Businesses, 2001–2016**



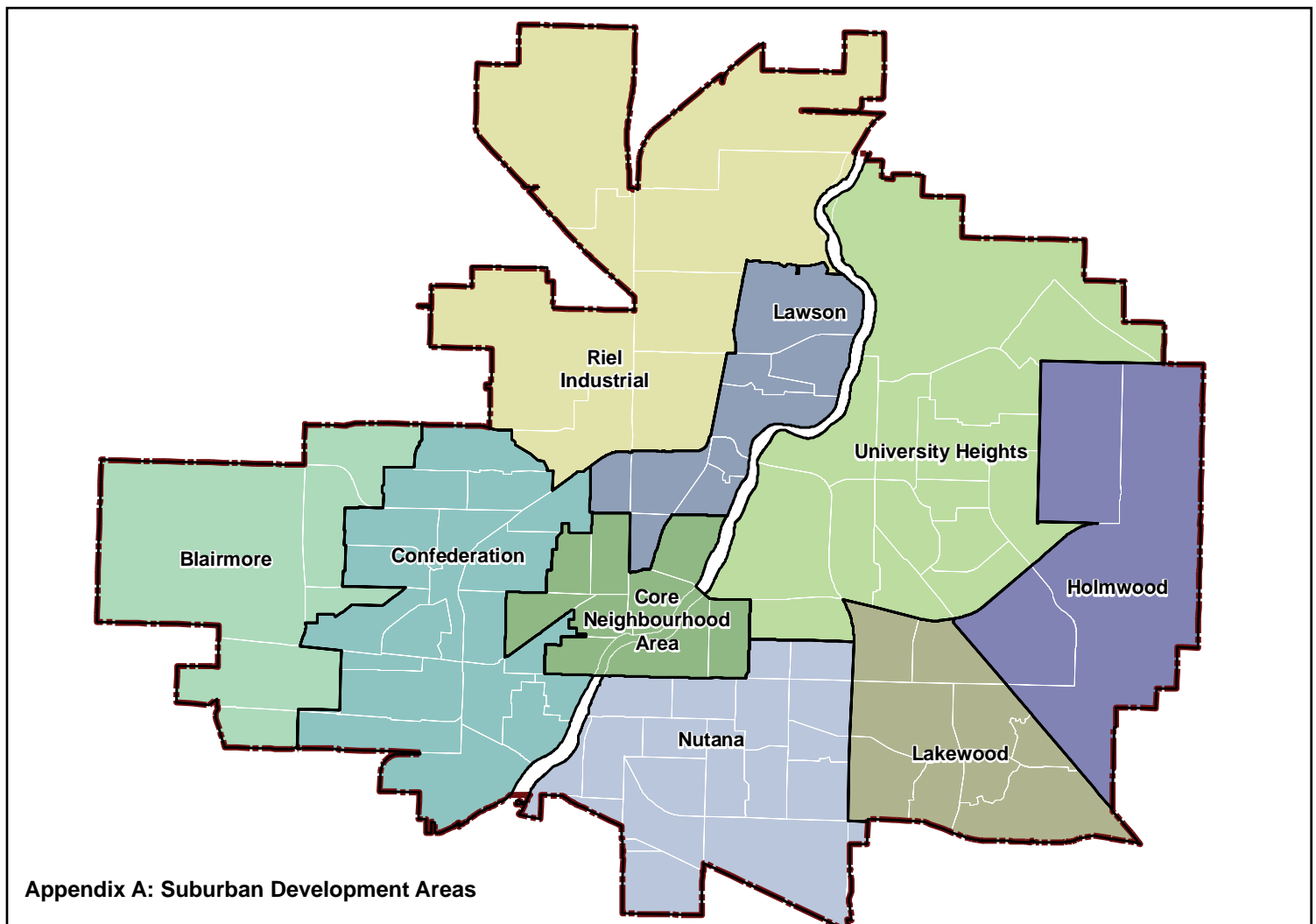
## Conclusion

Business and employment opportunities in Saskatoon continue to grow with the overall economy and population. The 2016 edition of the Employment Profile has identified that the City's expansive regional service area continues to support a strong and growing services-producing sector. Within the services-producing sector, businesses classified as Business & Building Support showed the greatest level of growth between 2011 and 2016 at 22%.

Small businesses continue to make a significant contribution to the economy as commercial businesses having fewer than 10 employees make up 69% of all licensed businesses in the City. This thriving entrepreneurial business community is also reflected in the growing number of licensed home based businesses. From 2011 to 2016 the number of home based businesses increased from 3,829 to 4,524.

Construction businesses act as the foundation of home based business development, as 31% of all home based businesses report involvement in this industry. Commercial employment numbers in the Construction sector also remain high, comprising 5% of total employment in 2016.

The downtown core continues to play a significant role in providing business and employment opportunities. While the total number of businesses in the downtown decreased by 2%, a 10% increase in total employment reflects a city wide transition to smaller scale and home-based offices.



As the City plans for a population of half a million, the goal is to guide development in order to achieve a balanced distribution of employment areas that are well designed and accessible by all modes of transportation. In order to meet this goal it is imperative that the City, developers and the business community have a clear understanding of statistics and trends in employment, commuter flows, business activity, and distribution of employment across industry sectors and our neighbourhoods. This perspective on employment ensures the City remains economically competitive and continues on a path of providing appropriate employment opportunities and closer live / work relationships through policy and future development initiatives.