



# EMPLOYMENT CHANGE IN SUB-AREAS

## Economy - Sectors

Step 1: Understanding Yesterday and Today

### Metropolitan Core Jobs & Economy Land Use Plan

#### Highlights

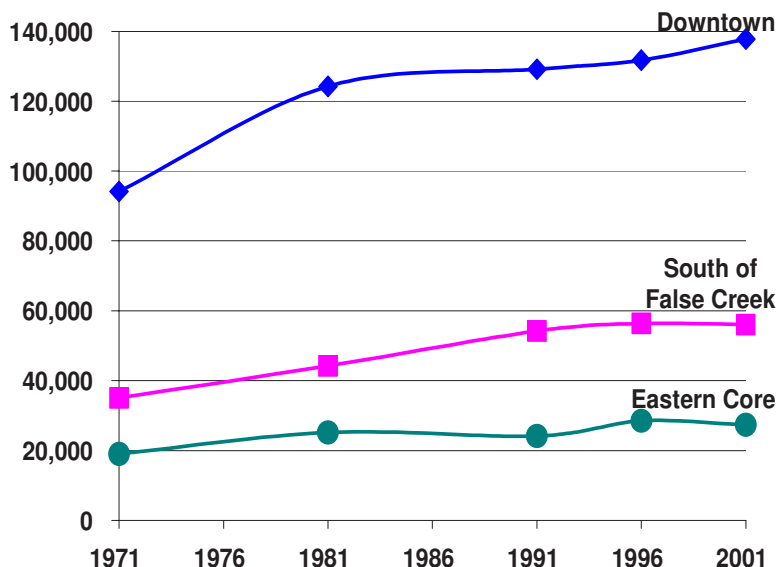
- Over the past 30 years, jobs grew in all 3 sub-areas of the Metro Core: Downtown, South of False Creek, and the Eastern Core.
- Most growth in the 3 areas was in two sector groups: professional and commercial services; and health, education, and government -- with slow growth or decline in the retail and industrial sectors.
- Within the growing groups, specific sub-sectors that are the largest now were generally the largest in the past (e.g., finance) - except computer services which grew rapidly to become one of the largest.
- In spite of the decline in retail jobs, retail did experience some growth South of False Creek. And, in spite of the overall decline in industrial jobs, the Eastern Core still has as many manufacturing jobs today as 30 years ago.
- Each area's share of jobs did not change much - Downtown was, and remains, the largest job area with about 62% of Metro Core jobs.



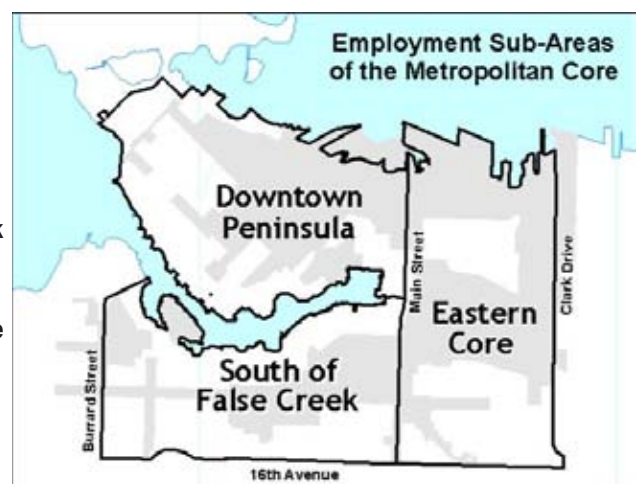
#### WHAT HAS BEEN THE JOB GROWTH IN THE METRO CORE SUB-AREAS?

Total jobs in the Metro Core grew from 148,250 in 1971 to 221,250 in 2001 - an increase of 73,000 (49%) (See Note 1). While all areas of the Metro Core experienced some job growth over the past 30 years, the most substantial job growth occurred Downtown. Overall, nearly 60% of total Metro Core job growth occurred Downtown (Figure 1 and Map 1). See pages 2 through 7 for a more detailed examination of job growth in each area.

Figure 1: Total jobs in Metro Core sub-areas - 1971 to 2001



Map 1: Employment sub-areas of the Metro Core



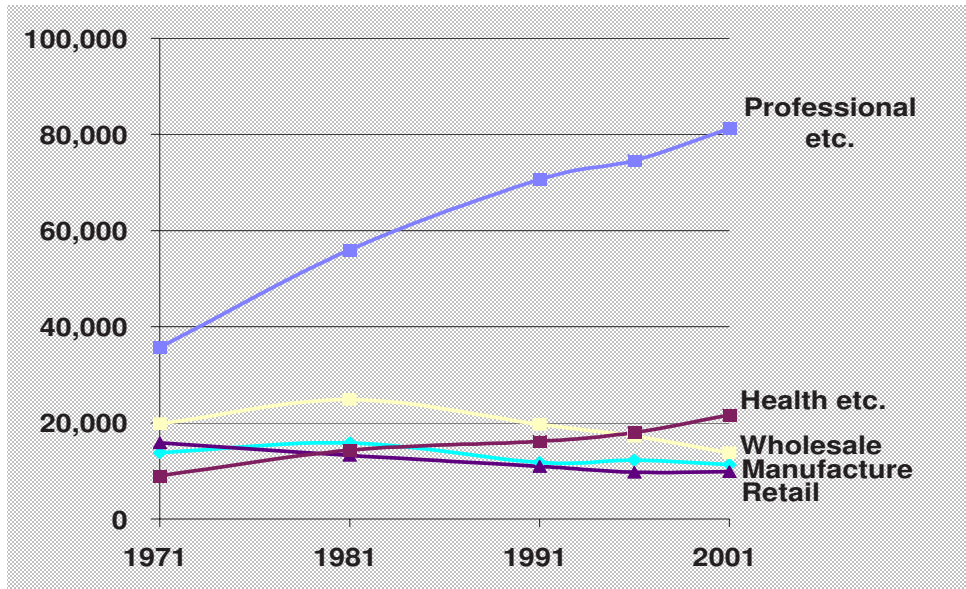
Statistics Canada Census: Jobs by SIC - Time Series 1.XLS. Note: data include estimate of workers with no fixed place of work. See Note 1 for explanation of the difference between job counts that include workers with no-fixed place of work and those that do not.

## HOW HAVE DOWNTOWN JOBS CHANGED?

The Downtown Peninsula contains 138,800 jobs (62% of Metro Core). The Downtown includes all areas northwest of Main street and Terminal avenue and includes the Central Business District which contains 85,700 jobs (see map on page 1 for the boundaries of the Downtown area).

Over the past 30 years, the number of Downtown jobs in the professional and commercial services group increased by 45,500. Downtown jobs in health, education and government also grew - by 12,600. Jobs in retail dropped - by 6,000. Jobs in manufacturing and wholesale dropped by 8,500, despite an increase in heavy construction jobs (found in the manufacturing group) (Figure 2) (see Table 2 in notes for economic sector groupings used in Figure 2).

Figure 2: Downtown jobs by sector group - 1971 to 2001

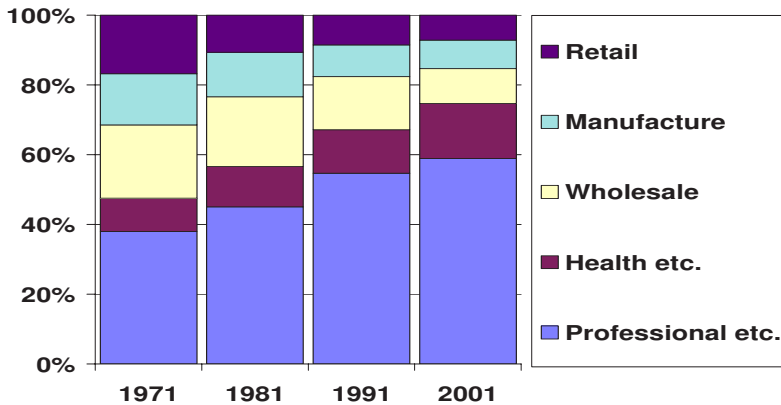


Statistics Canada Census: Jobs by SIC - Time Series 1.XLS. Data include workers with no fixed place of work. See Notes 1, 2 & 3.

## How have these changes impacted the employment make up of the area?

Over the past 30 years, the Downtown has gained jobs in some economic activities and lost jobs in others. These changes have shifted the employment makeup of the area. In particular, the percent of total jobs in professional services, health, education and government has grown - from 48% to 75% (Figure 3):

Figure 3: Employment make-up of the Downtown - 1971 to 2001



Statistics Canada Census: Jobs by SIC - Time Series 1.XLS. Data include workers with no fixed place of work. See Notes 1 & 2.

### Example of Change in Office Jobs

Table 1 illustrates how jobs in the professional services group have replaced office jobs in the manufacturing group. In Census Tract 66, jobs in computer and legal services made up for the decline in resource sector office jobs in energy, forestry and mining (Table 1).

	1981	2001	Change	% Change
Energy, Forestry, & Mining	4,225	999	(3,227)	-76%
Computer and Legal Services	1,930	5,032	3,102	161%

Statistics Canada Census: Jobs by SIC (3-digit), 1981 & 2001.xls. Note: CT 66 runs North of Robson from Burrard to Cardero. CT 66 was selected for this analysis as it did not contain non-office energy, forestry and mining jobs in 1981. Total jobs CT 66 grew by 901 (31,759 to 32,660). See Note 4.

### What sub-sectors account for the most change in this area?

As shown in Figure 2 above, the economic activities that account for most Downtown job growth are in the professional and health groupings. Breaking these groupings down into their component sub-sectors allows for a more detailed examination of the sources of job growth (Figure 4).

Sub-sectors with the most absolute employment growth (at least 2,000 more jobs) include:

- Computer services (approx. 7,000 more jobs)
- Offices of lawyers (approx. 3,800 more jobs)
- Food and beverage services (approx. 3,700 more jobs)
- Travel and other services (approx. 2,400 more jobs)

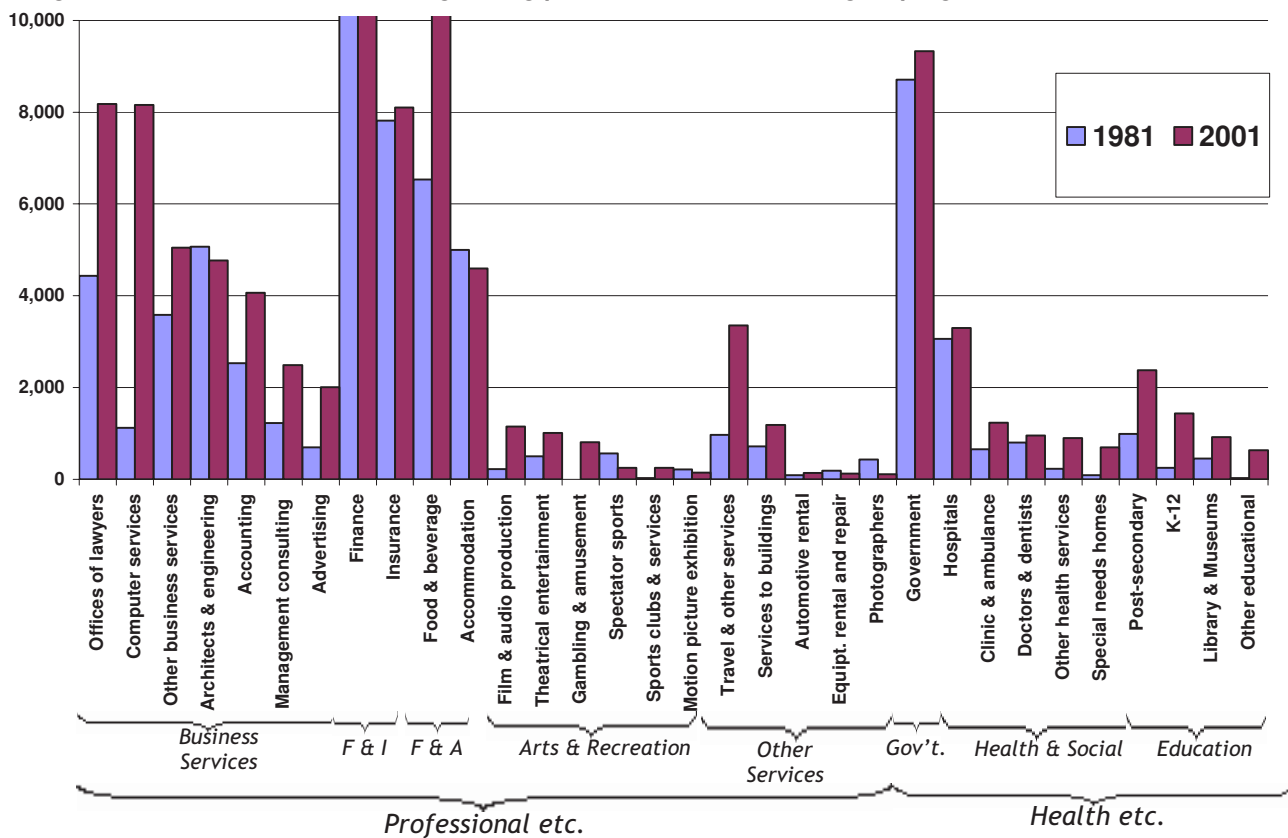
Sub-sectors with a rapid growth rate (at least 4 times more jobs) include:

- Computer services
- K-12 educational services
- Film & audio production
- Other health services (e.g. labs, health agencies, practitioners other than physicians and dentists)
- Gambling and amusement
- Special needs homes
- Other educational services (e.g. language schools, vocational testing services)
- Sports clubs and services

In addition, some of the largest sub-sectors (at least 8,000 jobs in 2001) experienced minimal job growth:

- Finance
- Insurance
- Government

**Figure 4: Sub-sectors within the growing professional and health groupings - Downtown, 1981-2001**



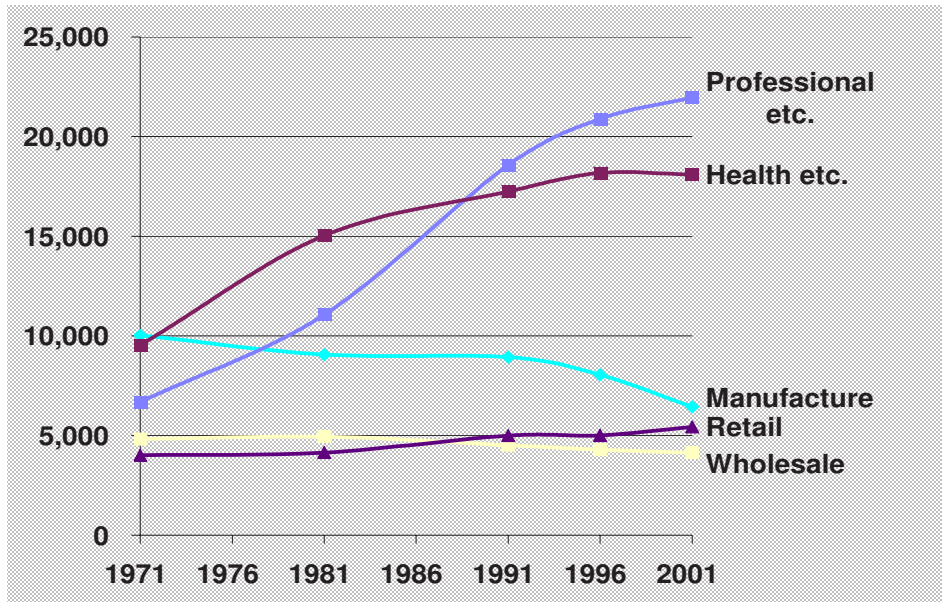
Statistics Canada Census: Jobs by SIC (3-digit), 1981 & 2001.xls. Note: data include estimate of workers with no fixed place of work. See Note 1

## HOW HAVE JOBS CHANGED IN THE SOUTH OF FALSE CREEK AREA?

The South of False Creek area contains 56,200 jobs (25% of Metro Core) and includes: the Broadway Corridor (24,800 jobs); industrial areas (12,300 jobs); the VGH area (7,600 jobs); and various neighbourhood shopping streets (11,500 jobs) (see map on page 1 for the boundaries of the South of False Creek area).

The South of False Creek area has experienced considerable job growth in both the professional services and health care groupings of economic activities. Since 1971, jobs in the professional services group have grown by over 15,000 while those in health grew by 8,500 (Figure 5).

Figure 5: South of False Creek jobs by sector group - 1971 to 2001

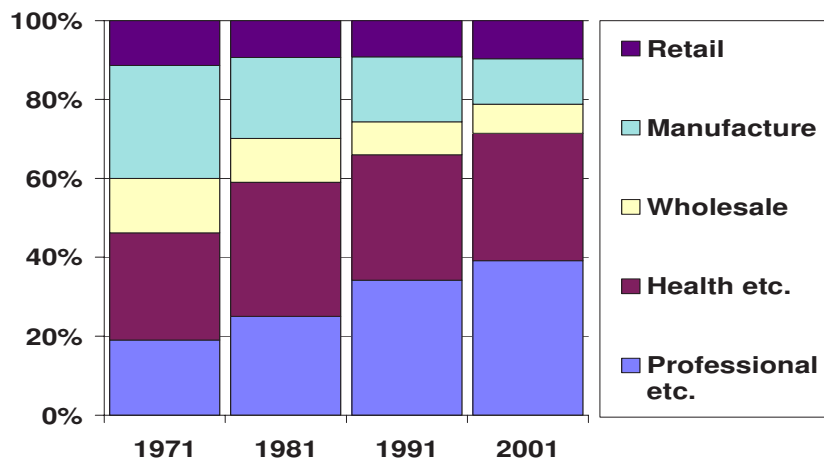


Statistics Canada Census: Jobs by SIC - Time Series 1.XLS. Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

## How have these changes impacted the employment make up of the area?

In the South of False Creek area, the percent of total jobs in the professional services group grew from 19% in 1971 to 39% in 2001, while the percent of total jobs in health, education and government has grown from 27% to 32% (Figure 6).

Figure 6: Employment make-up of South of False Creek - 1971 to 2001



Statistics Canada Census: Jobs by SIC - Time Series 1.XLS. Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

### What sub-sectors account for the most growth in this area?

The professional and health groupings account for most job growth in the South of False Creek area. Breaking these groupings down into their component sub-sectors allows for a more detailed examination of the sources of job growth (Figure 7).

Sub-sectors with the most absolute employment growth (at least 1,000 more jobs) include:

- Food and beverage services (approx. 2,400 more jobs)
- Finance (approx. 1,600 more jobs)
- Computer services (approx. 1,400 more jobs)
- Film & audio production (approx. 1,000 more jobs)

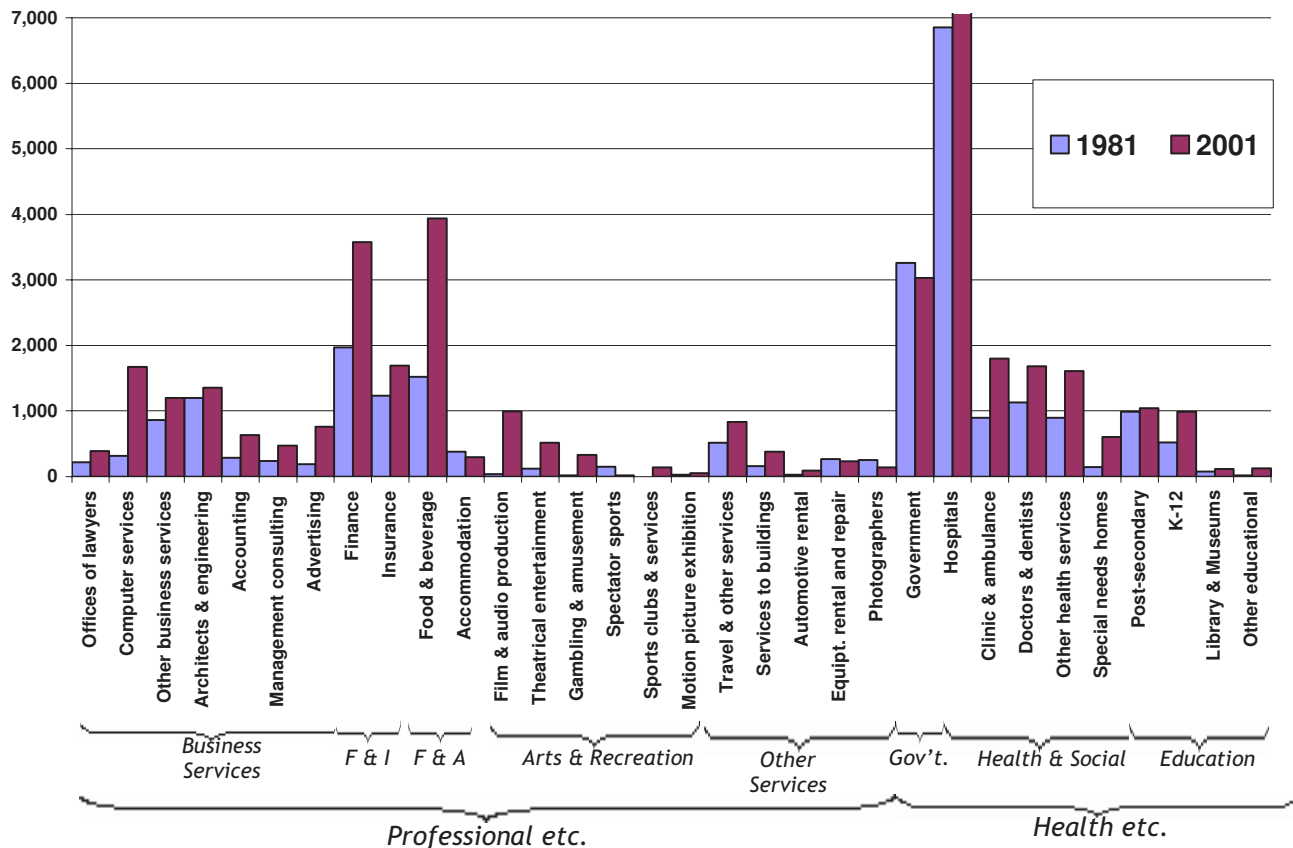
Sub-sectors with a rapid growth rate (at least 4.5 times more jobs) include:

- Computer services
- Film & audio production
- Theatrical entertainment
- Gambling & amusement
- Sports clubs & services
- Other educational (e.g. language schools, vocational testing services)

In addition, some of the largest sub-sectors (at least 3,000 jobs in 2001) experienced either minimal job growth or a slight decrease in jobs:

- Hospitals
- Government

Figure 7: Sub-sectors within the growing professional and health groupings - South of False Creek, 1981-2001



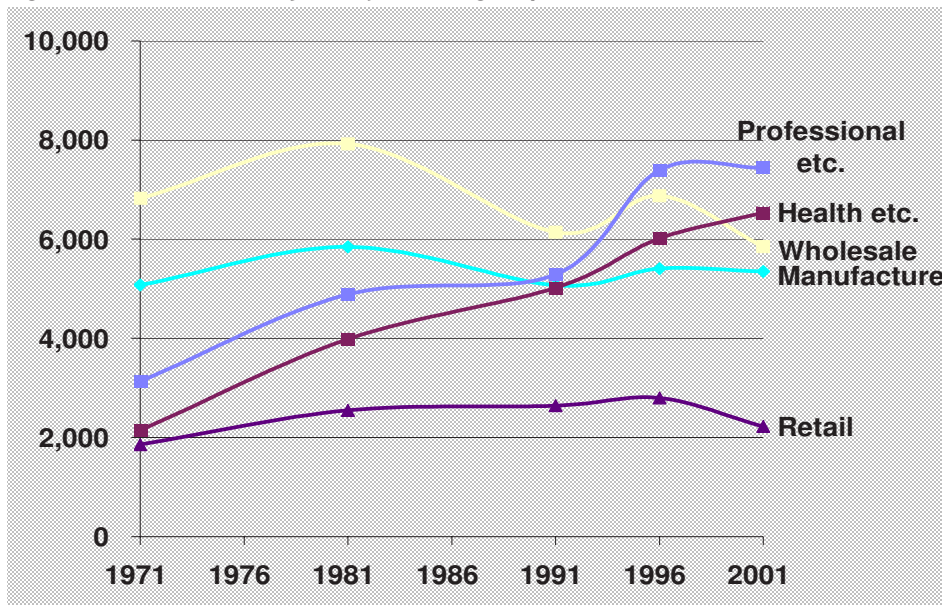
Statistics Canada Census: Jobs by SIC (3-digit), 1981 & 2001.xls. Note: data include estimate of workers with no fixed place of work. See Note 1.

## HOW HAS THE EASTERN CORE CHANGED?

The Eastern Core contains 27,400 jobs (12% of Metro Core) and includes: industrial areas (15,400 jobs); the portion of the Downtown Eastside located East of Main St. (6,100 jobs); and various neighbourhood shopping streets (5,900 jobs) (see map on Page 1 for the boundaries of the Eastern Core area).

The Eastern Core has gained nearly 8,400 jobs since 1971. Between 1971 and 2001, Eastern Core jobs in the professional services group increased by 4,300, while jobs in the health group increased by 4,400. Jobs in wholesale and transportation fell by 975 while manufacturing increased by 273. Within the manufacturing group, the clothing manufacturing sub-sector experienced strong growth with an increase of 710 jobs (Figure 8).

Figure 8: Eastern Core jobs by sector group - 1971 to 2001

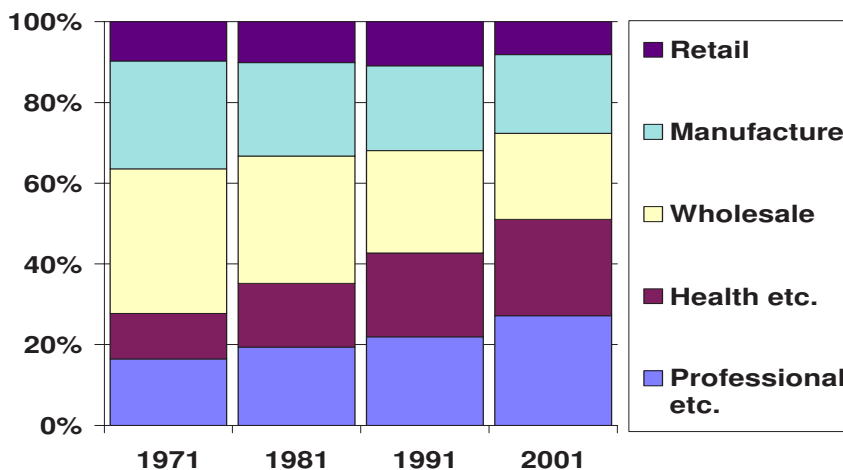


Statistics Canada Census: Jobs by SIC - Time Series 1.XLS. Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

## How have these changes impacted the employment make up of the area?

Over the past 30 years, the percent of total jobs in professional services grew from 16% to 27%, while the percent of total jobs in health grew from 11% to 24% (Figure 9).

Figure 9: Employment make-up of the Eastern Core - 1971 to 2001



Statistics Canada Census: Jobs by SIC - Time Series 1.XLS. Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

### What sub-sectors account for the most growth in this area?

The economic activity groupings that account for the most job growth in the Eastern Core are professional and health. Breaking these activities down into their component sub-sectors allows for a more detailed examination of the sources of job growth (Figure 10).

Sub-sectors with the most absolute employment growth (at least 500 more jobs) include:

- Computer services (approx. 700 more jobs)
- Post secondary (approx. 600 more jobs)
- Government (includes police) (approx. 500 more jobs)
- Other health services (e.g. labs, health agencies, practitioners other than physicians and dentists) (approx. 500 more jobs)

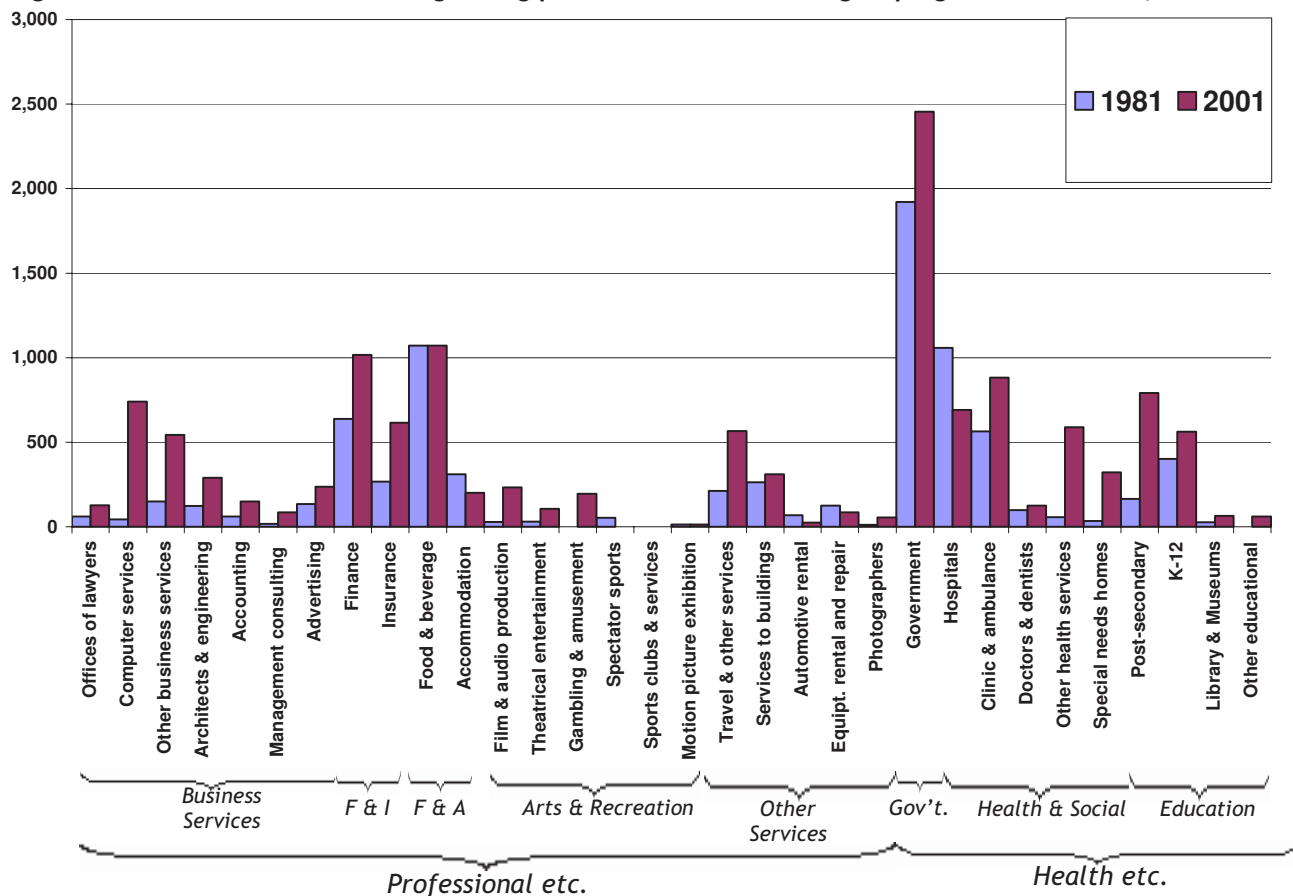
Sub-sectors with a rapid growth rate (at least 9 times more jobs) include:

- Computer services
- Other health services (e.g. labs, health agencies, practitioners other than physicians and dentists)
- Special needs homes
- Gambling & amusement
- Other educational (e.g. language schools, vocational testing services)
- Sports clubs & services

In addition, some of the largest sub-sectors (at least 1,000 jobs in 1981) experienced either minimal job growth or a slight decrease in jobs:

- Food and beverage services
- Hospitals (includes St. Josephs)

**Figure 10: Sub-sectors within the growing professional and health groupings - Eastern Core, 1981-2001**



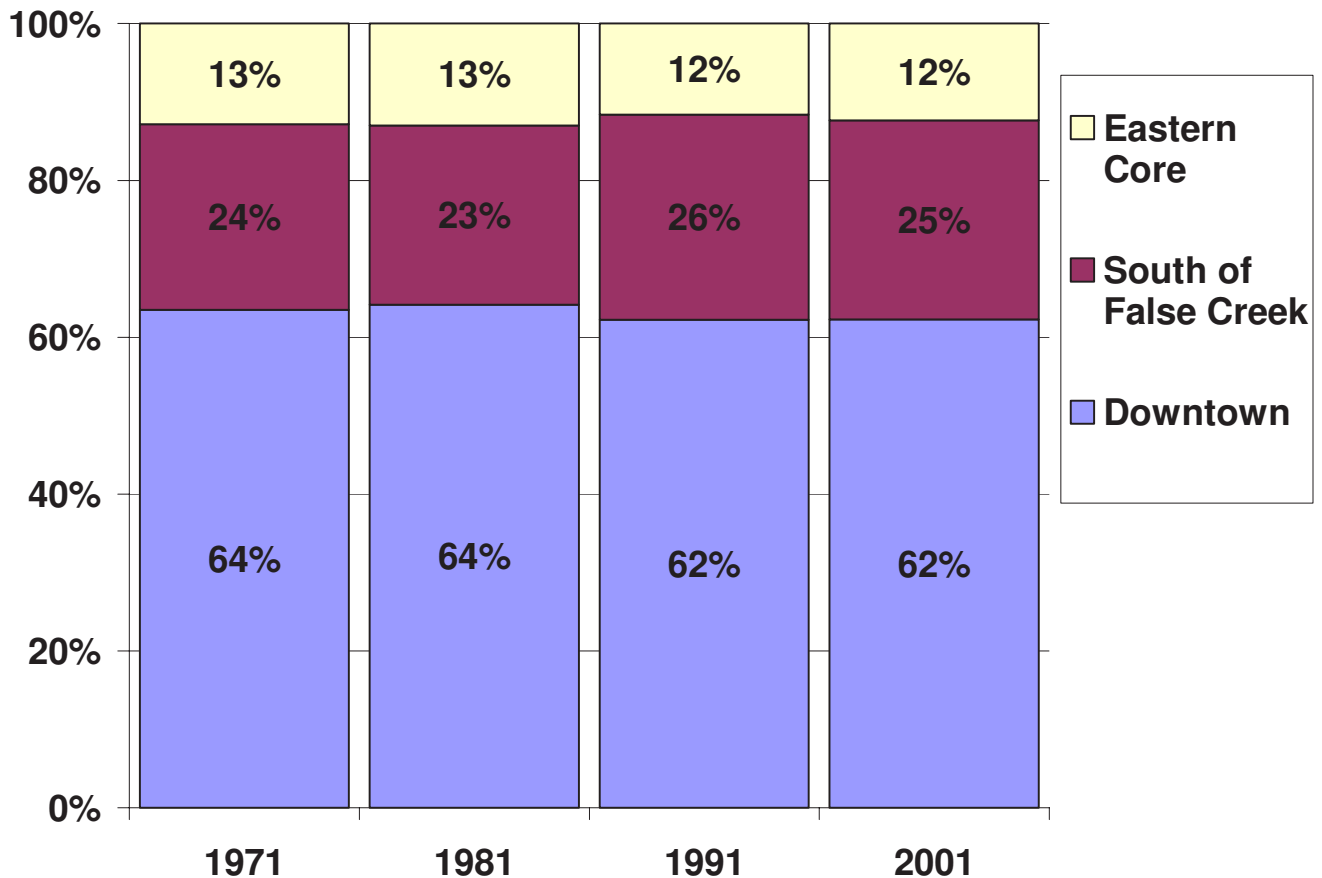
Statistics Canada Census: Jobs by SIC (3-digit), 1981 & 2001.xls. Note: data include estimate of workers with no fixed place of work. See Note 1.

## HOW HAS THE GEOGRAPHIC DISTRIBUTION OF METRO CORE JOBS CHANGED OVER TIME?

Like 1971, the downtown remains the dominant employment area accounting for nearly two-thirds of Metro Core jobs (Figure 11).

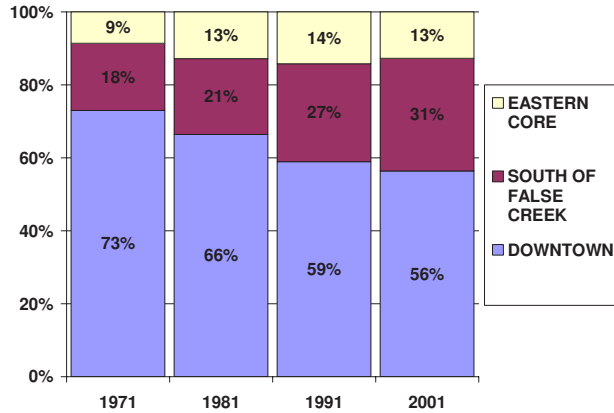
There has been very little change in the percent of total Metro Core jobs located in each sub-area. This pattern also holds true for nearly every economic activity grouping except retail. South of False Creek now accounts for a significantly higher share of Metro Core retail jobs than in 1971 (31% today vs 18% in 1971), and similarly the Downtown now accounts for a significantly lower share (56% vs 73%). (See Figures 12 through 16 on the next page).

Figure 11: Geographic distribution of Metro Core jobs - 1971 to 2001



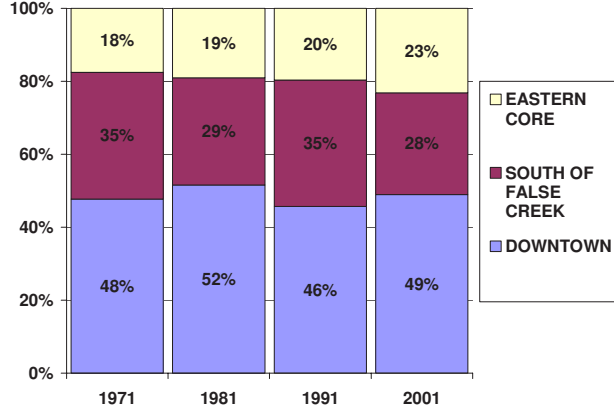
Statistics Canada Census: Geog Dist of MC Jobs 1971 to 1991.xls. Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

**Figure 12: Retail job distribution in the Metro Core - 1971 to 2001**



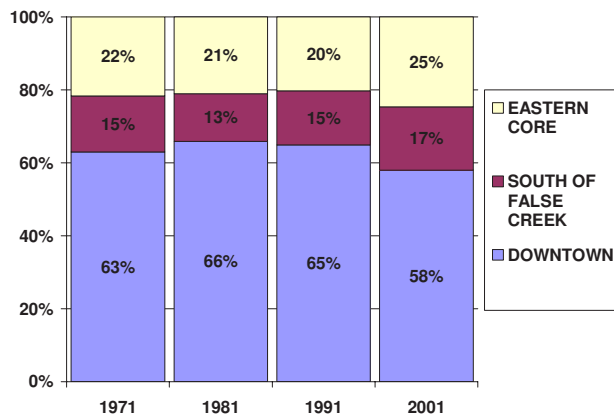
Statistics Canada Census: Geog Dist of MC Jobs 1971 to 1991.xls.  
 Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

**Figure 13: Manufacturing & primary industries job distribution in the Metro Core - 1971 to 2001**



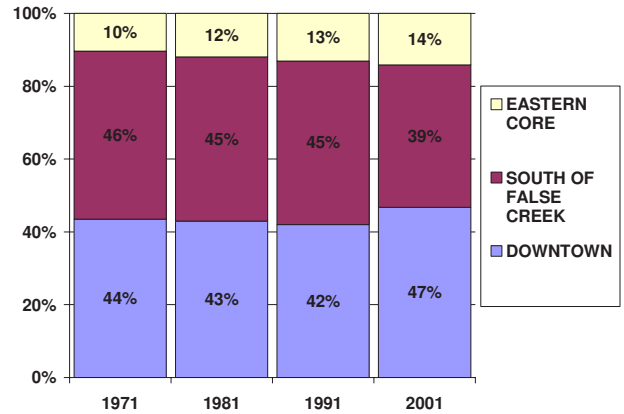
Statistics Canada Census: Geog Dist of MC Jobs 1971 to 1991.xls.  
 Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

**Figure 14: Wholesale and transportation job distribution in the Metro Core - 1971 to 2001**



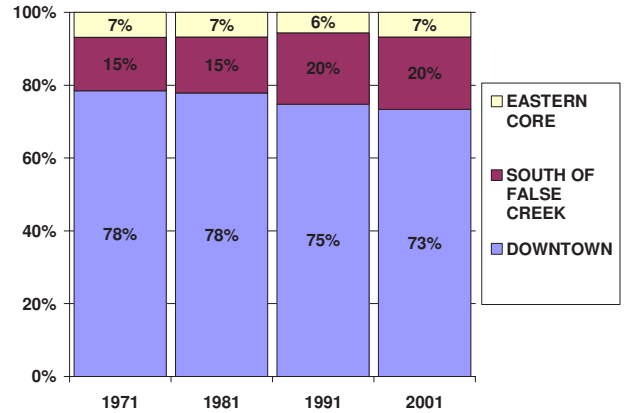
Statistics Canada Census: Geog Dist of MC Jobs 1971 to 1991.xls.  
 Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

**Figure 15: Health, education and government job distribution in the Metro Core - 1971 to 2001**



Statistics Canada Census: Geog Dist of MC Jobs 1971 to 1991.xls.  
 Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

**Figure 16: Professional and commercial services job distribution in the Metro Core - 1971 to 2001**



Statistics Canada Census: Geog Dist of MC Jobs 1971 to 1991.xls.  
 Note: data include estimate of workers with no fixed place of work. See Notes 1 and 2.

## HOW DO THE CHANGES TO EACH AREA COMPARE WITH ONE ANOTHER?

- Over 30 years, jobs grew in all three sub-areas: Downtown, South of False Creek, and Eastern Core. (Downtown was, and remains, the largest of the areas.)
- Most growth in all three areas was in the two sector groupings of professional and commercial services; and health, education, and government -- with slow growth or decline in retail and industrial related jobs.
- The two growing groups became the dominant groups - increasing from less than 50% of jobs, to over 50% of jobs in all the areas.
- Within the two growing groups, the sub-sectors that are largest today were generally also the largest in 1981 (e.g., Finance). The exception is Computer Services which was small in 1981 but experienced rapid growth to become among the largest today in all three areas. Several smaller sub-sectors also experienced fast growth in more than one sub-area - e.g., film and audio production and health services.
- Even in the Eastern Core where industrial areas have over half of jobs, growth in professional and commercial services more than made up for losses or slow growth in retail and industrial groups. Nevertheless, the Eastern Core still has as many manufacturing jobs today as 30 years ago.
- And, in spite of the general decline in retail jobs, retail did experience some growth South of False Creek, making retail the only sector group to significantly change its distribution pattern across the Metro Core with a shift away from Downtown.

**Table 1: Summary of Changes to the Metro Core Sub-Areas**

	Sub-area		
	Downtown	South of False Creek	Eastern Core
<b>Total job growth: 1971-2001</b>	43,600	21,000	8,400
Share of Metro Core job growth	60%	29%	11%
Rate of total job growth	46%	60%	45%
Change in professional etc. jobs	+ 45,500	+ 15,000	+ 4,300
Change in health etc. jobs	+ 12,600	+ 8,500	+ 4,400
Change in retail jobs	- 6,000	+ 1,400	+360
Change in wholesale/ transportation jobs	- 6,100	- 700	- 1000
Change in manufacturing jobs	- 2,500	- 3,600	+ 300
Percent of jobs in Professional etc. & Health etc.: 1971 & 2001	47% to 75%	46% to 71%	28% to 51%
<b>Job growth by sub-sector: 1981-2001</b>			
Sub-sectors with the highest absolute growth	Computer Legal Food & beverage Travel & other services	Food & beverage Finance Computer Film & audio production	Computer Post secondary Government Other health
Sub-sectors with the fastest growth rate	Computer services K-12 educational services Film & audio production Other health services	Computer services Film & audio production Theatrical entertainment Gambling & amusement	Computer services Other health services Special needs homes Gambling & amusement
Large sub-sectors with stagnant or negative growth	Finance Insurance Government	Hospitals Government	Food & beverage Hospital

## Sources / Contacts

Sources of information are recorded throughout this Information Sheet. Additional notes are provided here:

1) Re: inclusion of workers with no fixed place of work. When workers with no-fixed place of work are added, the estimated number of total jobs in the Metro Core rises from 199,955 to 221,250. To make comparisons over time, these workers must be included because they were not separated out in past data. The estimate is reached by assigning to the Metro Core a share of the workers with no fixed place of work. The share is determined on a sector by sector basis and is based on the number of workers with a known place of work. The GVRD makes these estimates for each municipality. (In other Information Sheets, workers with no fixed place of work are not included because they are not as relevant to identifying job locations needs in the Metro Core, which is the purpose of this study and because on a sector-by-sector basis in small geographic areas the data is more accurate without this estimate.)

2) Re: Standard Industrial Classification. All employment data presented in this information sheet is based on the 1980 SIC (Standard Industrial Classification). In most figures, these sectors have been grouped into five major types of activities in order to show the general nature of employment in each time period in each area. The five groupings are defined according to Table 2 below.

(In other information sheets created for this study, employment data for 2001 is based on the 1997 NAICS (North American Industrial Classification System) which has more detail than SIC. However, to track change over time, SIC must be used.)

<b>Economic Activity Grouping</b>	<b>SIC Category</b>
Manufacture	Primary
	Manufacturing
	Construction
Wholesale	Transportation Communication Utilities
	Wholesale
Professional etc.	Finance Insurance Real Estate
	Commercial Services (incl. accommodation, food, arts, and personal services)
Health etc.	Non Commercial Services (incl. health, social services and education)
	Public Administration
Retail	Retail

3) For information on more detailed Employment Areas within the 3 major sub-areas, see Info Sheets on specific areas [e.g., CBD Today, Mt. Pleasant Industrial Area Today]. Data specific to these Employment Areas is only available for the 2001 Census. For change over time, the larger sub-areas must be used, as in this Info Sheet.

4) In text box on page 2, jobs are defined using 1980 SIC. "Energy, Forestry, & Mining Jobs" equal the sum of: Major Group 04 - Logging industry, Major Group 05 - Forestry services industry, Major Group 06 - Mining industries, Major Group 07 - Crude petroleum and natural gas industries, Major Group 09 - Service industries incidental to mineral extraction, Major Group 25 - Wood industries, and Major Group 27 - Paper and allied products industries. "Computer and Legal Services Jobs" equal the sum of: sub-sector 776 - Offices of lawyers and notaries and sub-sector 772 - Computer and related services.

This Information Sheet was published by the City of Vancouver. It is one in a series of Information Sheets produced for the Metropolitan Core Jobs and Economy Land Use Plan. The purpose of this initiative is to develop a long term land use policy plan to accommodate future economic activity and jobs in the Metro Core. For further information, please e-mail [corejobs@vancouver.ca](mailto:corejobs@vancouver.ca) or visit the website [www.vancouver.ca/corejobs](http://www.vancouver.ca/corejobs)