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REPORT

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Surrey Board of Trade Surrey Labour Market Intelligence Report

September 2023 (including results of Statistics Canada's October 2023 Labour Force Survey)

The Surrey Board of Trade (SBOT) continues to provide the only Surrey-specific labour market data on a regular basis. This summary report compares employment changes in Surrey from during the middle of the COVID-19 pandemic (September 2021) and through to September 2023 to show the local employment impacts of the pandemic and other factors. This report is prepared by Human Capital Strategies in conjunction with the Surrey Board of Trade.

This is the fifth of six SBOT Labour Market Intelligence (LMI) Reports in 2023. Note that in these bi-monthly reports, "COVID-19" has been removed from headings as we are no longer comparing current employment with a pre-COVID baseline in February 2020. Surrey employment levels in 2021 are now a new benchmark or baseline with which we are comparing current levels (see Footnote 5 at the end for Methodology).

In previous reports until the end of 2022, the Labour Force Data provided by Statistics Canada was based on population counts from the 2016 Census of Population. As of the February 2023 report, the estimates have been adjusted to reflect the population counts from the 2021 Census. As a result, you will see some minor changes in numbers from Labour Market Intelligence Reports published in 2023. All of the numbers for 2021 and beyond provided in this report have been updated based on the revised labour force data from Statistics Canada.

Highlights

Employment in Surrey in September 2023 was an estimated 2.7% or almost 8,800 jobs above employment in September 2022; and over 4.5% or 14,300 jobs more than in September 2021.

Sectors

The largest industry employment sectors in Surrey in September 2023 were a combination of knowledge-based services and goods-producing sectors:

1. Wholesale and retail trade (57,474 or 17.1% of total jobs in Surrey);
2. Health care and social assistance (41,556 or 12.4% of total jobs in Surrey);
3. Transportation and warehousing (30,817 or 9.2% of total jobs in Surrey);
4. Construction (30,404 or 9.1% of total jobs in Surrey);
5. Manufacturing (26,659 or 7.9% of total jobs in Surrey); and,
6. Professional, scientific and technical services (25,100 or 7.6% of total jobs in Surrey).

The sectors with the most negative employment change in Surrey over the last 12 months are estimated to be:

1. Employment in business, building and other support services¹ declined by a huge 24.2% or -3,952 jobs.
2. Construction job growth further reversed over the last 12 months, dropping -2,740 jobs or 8.3%.
3. Manufacturing employment in Surrey dropped by 6.4% over the last 12 months (or -1,840 jobs).
4. Surrey's information, culture and recreation sector lost over -1,100 jobs or 7.8% of employment.

Over the last 12 months, Surrey experienced employment growth almost totally in service-producing sectors, with the exception of resources (up 36.8%) and public administration (up 7.5%) sectors – those with the greatest job growth to September 2023 are estimated to be:

1. Over 45% of Surrey's gross employment growth over the last 12 months came from the wholesale and retail trade employment with an increase of 7.5% or just over 4,000 jobs in Surrey;
2. The "other services" sector grew by over 2,300 jobs for a 21.7% increase;

¹ Examples: Administrative facilities and call centres; janitorial, landscaping and carpentry services for buildings; and waste and remediation services, such as garbage collection and recycling.

3. Professional, scientific and technical services increased by almost 10.0% or over 2,300 jobs; and,
4. Health care employment, perhaps with all-out recruitment and hiring efforts, rose by 5.8% or 2,279 jobs since September 2022.

Occupations

Employment trends over the last 12 months show that the five largest employment sectors by occupation in Surrey in September 2023 accounted for 242,240 jobs, almost 60% of the total employed:

1. Sales and services (87,552 or 26.1%);
2. Trades, transport and equipment operators (56,347 or 16.8%);
3. Business, finance and administration (47,502 or 1.2%);
4. Education, law and social, community and government services (ELSCGS) (28,207 or 8.4%); and,
5. Health care (27,294 or 8.4%).

As of September 2023, the growth in employment by broad occupational category in Surrey since September 2022 again reflects strong growth in service-producing sectors:

1. Driven by Surrey's growth in service-producing sectors, management jobs grew by 21.3% or 3,876 jobs over the last 12 months.
2. The ELSCGS sector added over 2,600 new jobs for a 10.3% increase.
3. Health care occupations represented over 2,500 new positions for a 10.3% increase.
4. While only growing 2.6% since September 2022, sales and services added 2,237 jobs in Surrey.

While a relatively small growth of 1,453 jobs since September 2022, employment in natural resources positions, including agriculture, in Surrey experienced a robust 37.2% increase.

Three other occupational categories in Surrey lost significant employment since September 2022:

- Manufacturing and utilities positions experienced another large decrease in employment over this period, declining by 17.1% or over 2,500 jobs;
- A further concern, the tech-related natural and applied sciences employment experienced a 16.8% decrease for a loss of over -3,700 jobs in Surrey over the last 12 months; and,
- Employment among trades, transport and equipment operator positions dropped by -7,435 jobs or 11.7% over the last 12 months.

Again, the labour market in Surrey over the last few years has reflected two themes:

- One is the sustained growth in jobs among key smaller goods-producing sectors in natural resources and utilities; while, unfortunately, manufacturing employment has lagged over the last two years and construction has shown only small jobs growth.
- The other is significant recoveries in large service industries such as wholesale and retail, transportation and warehousing, and finance, etc.; and in public sectors such as education; and to a smaller extent in the information, culture and recreation sector.

While Surrey had higher employment growth than Canada and BC (2.7% versus 1.7%) over the last 12 months, factors such as inflation concerns including wages, interest rates, housing costs and availability, talent shortages, supply chain issues (including labour disputes), government regulation (particularly related to resource sectors) and other trends continue to combine to prevent a more robust recovery since the worst of the pandemic.

As we move into the fall of 2023, there remains further uncertainty about what the flu season, the highly contagious respiratory syncytial virus (RSV) and new strains of COVID-19 will bring to businesses, workplaces and workers in the coming months.

COVID-19 Employer, Labour Force and Workforce Impacts in September 2023

Surrey Employer Employment Impacts: Estimates extrapolated from Statistics Canada's 2016 Census and 2023 Statistics Canada Labour Force Survey (October 2023).

Surrey and Metro Vancouver Changes: Labour Force Per Census 2016 and 2021²³

Over the last 12 months, Surrey employment grew by an estimated 8,799 jobs or 2.7% since September 2022. This is significant (and more than BC's growth of 1.7%), and higher than the growth in the previous 12 months (September 2021-September 2022) which was more than 5,500 jobs or 1.7% as part of the COVID-19 recovery since 2021.

Surrey's recent labour market growth has been substantial when compared to the broader Metro Vancouver Region (Regional District, which includes Surrey). Between 2016 and 2021, the Metro Vancouver area saw a labour force growth of 112,700 or 8.3% over this 5-year period.

Surrey's labour force grew by 308,190 or a healthy 12.2%, an almost 2.5% average annual growth, over this same period. As a result, Surrey's labour force in 2021 as a percentage of Metro Vancouver's grew to 21.0% from just above 20.0% in 2016. Interestingly, Surrey's labour force as a proportion of Metro Vancouver's in 2021 was relatively higher in blue collar occupations such as 30.1% in trades, transport and equipment operators, 26.9% in natural resource occupations, and 34.2% in occupations in manufacturing and utilities. The Surrey labour force was proportionately lower than Metro Vancouver's in occupations in art, culture, recreation and sport (9.9%), in senior management positions (12.0%), in natural and applied sciences (13.9%), and in education, law, social, community and government services (16.8%).

Surrey Employment Impacts BY INDUSTRY – September 2021 to September 2023

Employment in Surrey in September 2023 was an estimated 2.7% or almost 8,800 jobs above employment in September 2022; and over 14,300 or 4.5% more than in September 2021. The largest industry employment sectors in Surrey in September 2023 were a combination of knowledge-based services and goods-producing sectors:

1. Wholesale and retail trade (57,474 or 17.1% of total jobs in Surrey);
2. Health care and social assistance (41,556 or 12.4% of total jobs in Surrey);
3. Transportation and warehousing (30,817 or 9.2% of total jobs in Surrey);
4. Construction (30,404 or 9.1% of total jobs in Surrey);
5. Manufacturing (26,659 or 7.9% of total jobs in Surrey); and,
6. Professional, scientific and technical services (25,100 or 7.6% of total jobs in Surrey).

Table 1 shows employment for September 2021, September 2022 and September 2023 in Surrey, by industry sector.

The sectors with the most negative employment change in Surrey over the last 12 months are estimated to be:

1. Employment in business, building and other support services⁴ declined by a huge -24.2% or -3,952 jobs.
2. Construction job growth further reversed over the last 12 months, dropping -2,740 jobs or -8.3%.
3. Manufacturing employment in Surrey dropped by -6.4% over the last 12 months (or -1,840 jobs); and,
4. Surrey's information, culture and recreation sector lost over -1,100 jobs or -7.8% of employment;

² Statistics Canada. 2023. (table). *Census Profile*. 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released February 8, 2023.

³ Statistics Canada, Table 14-10-0379-01.

⁴ Examples: Administrative facilities and call centres; janitorial, landscaping and carpentry services for buildings; and waste and remediation services, such as garbage collection and recycling.

Table 1: Estimated Employment by Industry in Surrey⁵ – September 2021 through September 2023
Adapted from Table 14-10-0379-01, Statistics Canada⁶

North American Industry Classification System (NAICS)	Employment September 2021	Employment September 2022	Employment September 2023	Change September 2022 to September 2023	
				Jobs	%
Total Employed (all industries)	321,279	326,802	335,601	8,799	2.7%
Agriculture, Forestry, Fishing, Mining, Quarrying, Oil & Gas	3,636	3,924	5,367	1,443	36.8%
Utilities	1,288	1,840	1,564	-276	-15.0%
Construction	29,287	33,144	30,404	-2,740	-8.3%
Manufacturing	29,941	28,725	26,885	-1,840	-6.4%
Wholesale & Retail Trade	54,234	53,470	57,474	4,004	7.5%
Transportation & Warehousing	32,771	31,201	30,817	-384	-1.2%
Finance, Insurance, Real Estate, Rental & Leasing	16,532	15,273	17,267	1,994	13.1%
Professional, Scientific & Technical Services	23,528	24,353	26,659	2,306	9.5%
Business, Building & Other Support Services	15,208	16,326	12,375	-3,952	-24.2%
Educational Services	14,384	16,787	17,856	1,070	6.4%
Health Care & Social Assistance	39,746	39,277	41,556	2,279	5.8%
Information, Culture & Recreation	12,475	14,200	13,096	-1,104	-7.8%
Accommodation & Food Services	21,279	23,145	22,468	-677	-2.9%
Other Services (except Public Administration)	13,188	10,752	13,083	2,331	21.7%
Public Administration	13,396	12,372	13,337	965	7.8%

Reference: Statistics Canada, Table 14-10-0379-01

Over the last 12 months, Surrey experienced employment growth almost totally in service-producing sectors, with the exception of resources (up 36.8%) and public administration (up 7.5%) sectors – those with the greatest job growth to September 2023 are estimated to be:

1. Over 45% of Surrey's gross employment growth over the last 12 months came from wholesale and retail trade employment, with an increase of 7.5% or just over 4,000 jobs in Surrey;
2. The "other services" sector grew by over 2,300 jobs for a 21.7% increase;
3. Professional, scientific and technical services employment increased by almost 10.0% or over 2,300 jobs; and,
4. Health care employment, perhaps with all-out recruitment and hiring efforts, rose by 5.8% or 2,279 jobs since September 2022.

⁵ Estimates based on Surrey share of Metro Vancouver (Census Metropolitan Area) by Industry in 2021.

⁶ Employment by Industry, three month moving average, unadjusted for seasonality.

Surrey Employment Impacts BY OCCUPATION – September 2021 to September 2023

Table 2 shows employment trends by occupation in Surrey over the last 12 months. The five largest employment sectors by occupation in Surrey in September 2023 accounted for 242,240 jobs almost 60% of the total employed:

- Sales and services (87,552 or 26.1%);
- Trades, transport and equipment operators (56,347 or 16.8%);
- Business, finance and administration (47,502 or 1.2%);
- Education, law and social, community and government services (ELSCGS) (28,207 or 8.4%); and,
- Health care (27,294 or 8.4%).

Table 2: Estimated Employment by Occupation in Surrey – September 2021 through September 2023
Adapted from Table 14-10-0430-01, Statistics Canada

National Occupational Classification	Employment September 2021	Employment September 2022	Employment September 2023	Change September 2022 to September 2023	
				Jobs	%
Total Employed (all occupations)	321,279	326,802	335,601	8,799	2.7%
Management	15,720	18,168	22,044	3,876	21.3%
Business, Finance & Administration	48,942	45,990	47,502	1,512	3.3%
Natural & Applied Sciences	21,615	22,212	18,487	-3,725	-16.8%
Health	26,596	24,743	27,294	2,551	10.3%
Education, Law & Social, Community & Government Services	26,897	25,570	28,207	2,638	10.3%
Art, Culture, Recreation & Sport	6,049	7,544	9,266	1,723	22.8%
Sales & Services	83,756	85,315	87,552	2,237	2.6%
Trades, Transport & Equipment Operators	58,244	63,782	56,347	-7,435	-11.7%
Natural Resources Agriculture & Related Production	4,896	3,901	5,353	1,453	37.2%
Manufacturing & Utilities	15,732	14,980	12,415	-2,565	-17.1%

Reference: Statistics Canada, Table 14-10-0430-01

As of September 2023, the growth in employment by broad occupational category in Surrey since September 2022 again reflects strong growth in service-producing sectors:

- Driven by Surrey's growth in service-producing sectors, management jobs grew by 21.3% or 3,876 jobs over the last 12 months.
- The ELSCGS sector added over 2,600 new jobs for a 10.3% increase.
- Health care occupations represented over 2,500 new positions for a 10.3% increase.
- While only growing 2.6% since September 2022, sales and services added 2,237 jobs in Surrey.

While a relatively small growth of 1,453 jobs since September 2022, employment in natural resources, including agriculture, in Surrey experienced a robust 37.2% increase.

Three other occupational categories of positions in Surrey lost significant employment since September 2022:

- Manufacturing and utilities positions experienced another large decrease in employment over this period, declining by 17.1% or over -2,500 jobs;
- A further concern, the tech-related natural and applied sciences employment experienced a 16.8% decrease for a loss of over -3,700 jobs in Surrey over the last 12 months; and,
- Employment among trades, transport and equipment operator positions dropped by -7,435 jobs or 11.7% over the last 12 months.

Over the last two years since September 2021, sectors that led the way in Surrey's job growth were:

- The resource sector with a 47.6% increase in jobs representing 1,731 new positions;
- Educational services increased by almost 3,500 jobs or 24.1%; and,
- The utilities sector added almost 3,000 jobs for a 21.4%.

In terms of occupational categories over the last two years, management positions increased by 40.2% or over 6,300 jobs; and art, culture, recreation and sport positions in Surrey rose by 53.2% or almost 1,500 new positions.

Over the same two-year period, the biggest decreases in employment were in:

- Manufacturing sector positions decreased by 10.2% or over -3,000 jobs;
- Natural and applied sciences positions dropped by 14.5% or over -3,000 jobs; and,
- Jobs in manufacturing and utilities occupational categories declined by 21.1% or over -3,300.

Again, the labour market in Surrey over the last few years has been a tale of two themes.

- One is the sustained growth in jobs among key smaller goods-producing sectors in natural resources and utilities; while, unfortunately, manufacturing employment has lagged over the last two years and construction has shown only small jobs growth.
- The other is significant recoveries in large service industries such as wholesale and retail, transportation and warehousing, and finance, etc.; and in public sectors such as education; and to a smaller extent in the information, culture and recreation sector.

While Surrey had higher employment growth than Canada and BC (2.7% versus 1.7%) over the last 12 months, factors such as inflation concerns including wages, interest rates, housing costs and availability, talent shortages, supply chain issues (including labour disputes), government regulation (particularly related to resource sectors) and other trends continue to combine to prevent a more robust recovery since the worst of the pandemic. Continuing uncertainty, talent shortages, increased costs of doing business and supply bottlenecks, lagging productivity and competitiveness will need to be addressed across BC and Surrey.

As we move into the fall of 2023, there remains further uncertainty about what the flu season, the highly contagious RSV virus and new strains or COVID-19 will bring to businesses, workplaces and workers in the coming months.

Sources:⁷

Statistics Canada. [Table 14-10-0379-01 Employment by industry, three-month moving average, unadjusted for seasonality \(x 1,000\)](#)

Statistics Canada. [Table 14-10-0381-01 Employment by occupation, three-month moving average, unadjusted for seasonality \(x 1,000\)](#)

More Information:

BC Labour Force Survey Data, Statistics Canada Labour Force Survey, September 2023 (Released October 6, 2023)

Source: BC Stats – Statistics Canada, Labour Force Survey, September 2023. Released, October 6, 2023.

Retrieved from https://www2.gov.bc.ca/assets/gov/data/statistics/employment-labour-market/lfs_data_tables.pdf

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⁷ Methodology: Census Profile data, using 2021 Census data, for both Surrey (Census Subdivision) and Vancouver (Census Metropolitan Area). The Census Profile for each geographic area, provides a count of the population for the labour force aged 15 years and over, by occupation (broad category) and by industry sectors. Then we take that data and calculate the percentage of the total Vancouver Census Metropolitan Area that Surrey (as Census subdivision) accounted for. In some cases, the Labour Force Survey data combines multiple industries when providing employment data (for example, counts for the Wholesale Trade industry and the Retail Trade industry in the Census Profile are separate, but employment is reported for "Wholesale and Retail Trade". In those cases, we calculate the count for the industries that were combined by geography and then compare the two to get the proportion for Surrey of the total of Vancouver.