tns canadian facts

Planning Institute of
British Columbia

Membership Survey

Highlights Summary

November/December 2007

(R1254)

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At TNS, we know that being successful in today's dynamic global environment requires more understanding, clearer direction and greater certainty than ever before. While accurate information is the foundation of our business, we focus our expertise, services and resources to give you greater insight into your customers' behavior and needs.

Our integrated, consultative approach reveals answers beyond the obvious, so you understand what is happening today – and what will happen tomorrow. That is what sets TNS apart.

Thank you for allowing us to explore your business needs. We hope you will continue to trust TNS to provide the insight you need to sharpen your competitive edge.

Foreword

BACKGROUND AND OBJECTIVES

In order to construct demographic and economic profiles of the membership and to determine member feedback on PIBC programs and services, the Planning Institute of British Columbia (PIBC) commissioned TNS Canadian Facts to conduct an online survey with PIBC members.

Specifically, the objectives of this research are to:

- Construct a demographic profile of PIBC members;
- Construct an economic profile of PIBC members;
- Evaluate workplace trends; and,
- Determine member opinion of PIBC programs and services.

RESEARCH METHODOLOGY

A total of 308 online interviews was conducted during November and December 2007. Interviews were conducted with either Full, Fellow, Provisional, Inactive/Non-Practicing or Retired members of the PIBC, thus a full census of members of record were included in the study. The 308 interviews represent 32% of PIBC's total professional membership.

The questionnaire was developed by TNS Canadian Facts in consultation with PIBC. TNS wishes to thank PIBC for their valuable input, feedback and assistance with the completion of this major survey of the BC membership.

Following approvals of the questionnaire and receipt of the member listings, TNS and members of the PIBC Communications Committee and Council tested the online questionnaire to ensure the workability of the program and to finalize question wording and sequencing. Once all surveys were received, TNS analyzed the data and prepared the Highlights Summary report contained herein.

Foreword (cont'd)

THE STUDY FINDINGS

Results of the research are presented under the following main headings:

- Highlights Summary
- Detailed Tables
- Appendix - Questionnaire

NOTE OF CAUTION

Data derived from sample populations are subject to variance. In order not to imply an unwarranted degree of precision, all percentage figures in the Highlights Summary have been rounded to whole numbers; therefore, percentages may not total 100.

Throughout the Highlights Summary, bold underlines have been used to denote unusually high figures at the 95% confidence level.

Further, it should be noted that percentages derived from "actual" bases of less than 100 respondents should be interpreted with caution, while percentages derived from "actual" bases of less than 50 should be interpreted with extreme caution.

June 2008

Highlights Summary

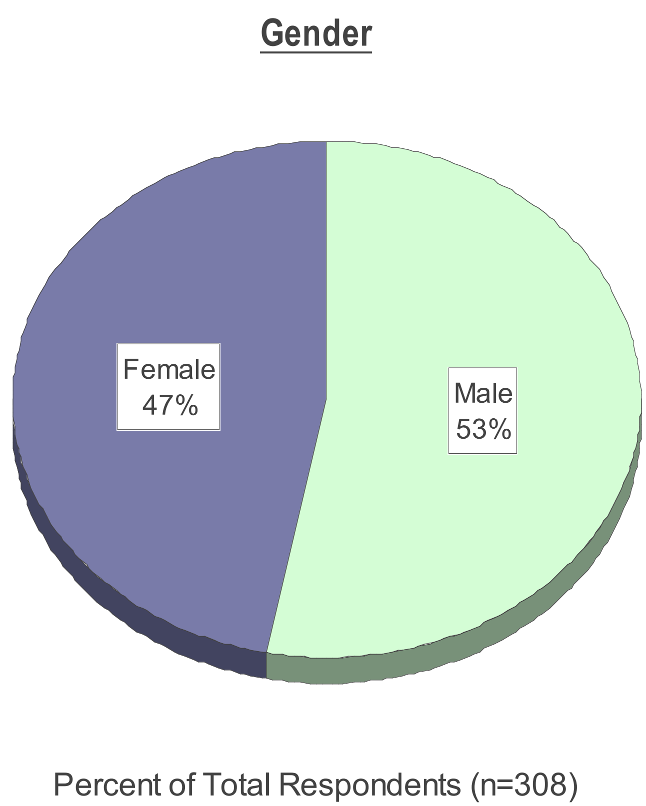
Demographic Profile

GENDER

- Of the 308 respondents to the survey, 162 (53%) are male and 146 (47%) are female. This gender split indicates that males and females are roughly represented by equal proportions in the PIBC membership.

AGE

- The largest age group of PIBC members is 30 to 39 years of age (32%), followed by the 50 to 59 age group (27%) and the 40 to 49 group (26%). The 18 to 29 age group represents 12% of the membership, while the 60+ group makes up 3%.
- The interesting numbers to note come in cross-referencing the age and gender results:
  - There is strong female membership growth in both the 18 to 29 and 30 to 39 age groups;
  - The 40 to 49 age group has nearly an equal percentage of male and female members represented; and,
  - The 50 to 59 age group is dominated by males.
- These results suggest that more female planners are joining the PIBC, and the planning profession in BC.



Demographic Profile (cont'd)

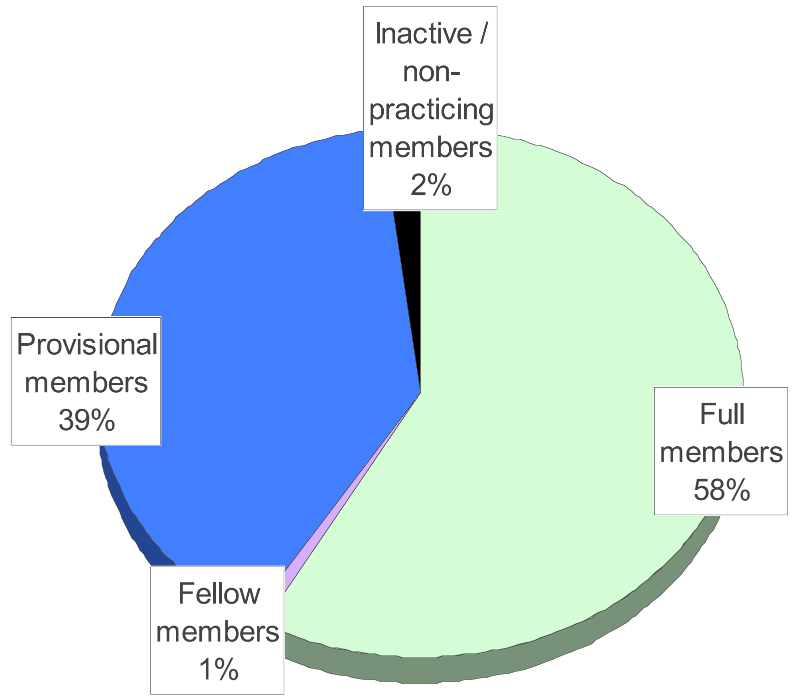
EDUCATION

- Nearly two-thirds of the responding members hold a Masters degree, while one-third of the respondents have attained a Baccalaureate. Two percent have doctoral status.
- Of note, Full members are more likely than Provisional members to hold a Masters degree, while Provisional members are more likely to have graduated with only a Bachelor degree than Full members.

MEMBERSHIP STATUS[1]

- 58% of members hold Full membership in the organization, while nearly 40% have Provisional status.
- As might be anticipated, Full members are recorded as having many more years of experience.
- Male members are more likely to hold Full memberships (62%), while female members are more likely to be Provisional members (46%)

Membership Status



Percent of Total Respondents (n=308)

1 There are four Fellow and six Inactive members who responded to this survey. Because of these small sample sizes, we will not be referring to these two groups in any analysis.

Demographic Profile (cont'd)

ORIGIN OF BIRTH

- 84% of PIBC members were born in Canada. Six percent are from Western Europe—or a total of 8% if Eastern Europe and Russia are included in this group. Four percent were born south of the border in the US.
- 87% of PIBC female members are Canadian, as opposed to 81% of PIBC male members being Canadian. It appears the growth in PIBC membership is coming from individuals born within Canada as 85% of young planners (aged 18 to 39 years) are from Canada.

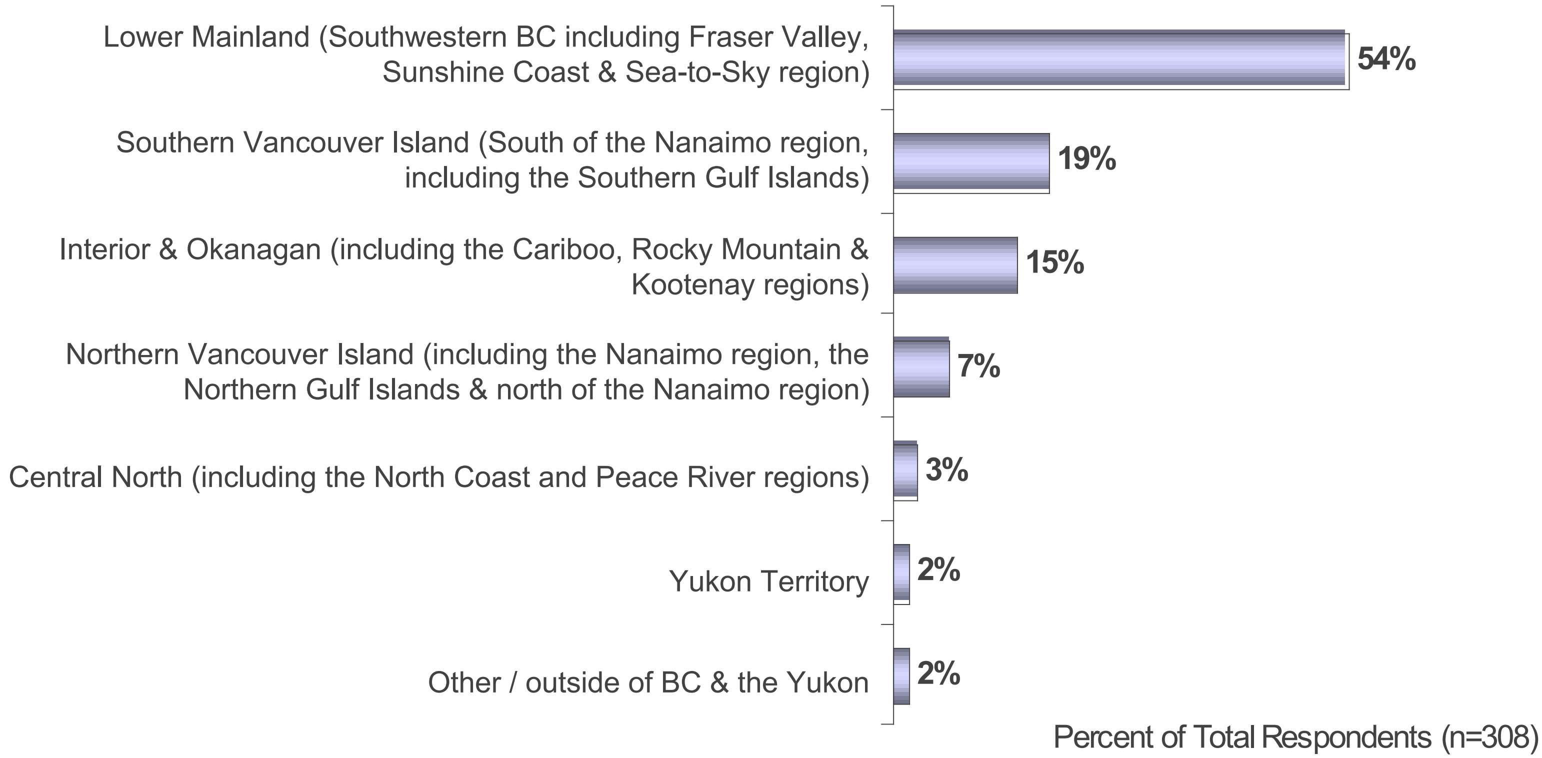
ORIGIN OF POST-SECONDARY EDUCATION

- Interestingly, 92% respondents state they received the majority of their post-secondary education in Canada and 3% of the membership received their university education from European countries or from the US.

Demographic Profile (cont'd)

WHERE PIBC MEMBERS LIVE – BC REGIONS

- Over one-half of respondents state that they live in the Lower Mainland region (which includes the Fraser Valley, the Sunshine Coast and the Sea-to-Sky region). Another 19% live on South Vancouver Island or the Southern Gulf Islands. Fifteen percent reside in the Interior (which includes the Okanagan, Cariboo, Rocky Mountain and Kootenay regions).

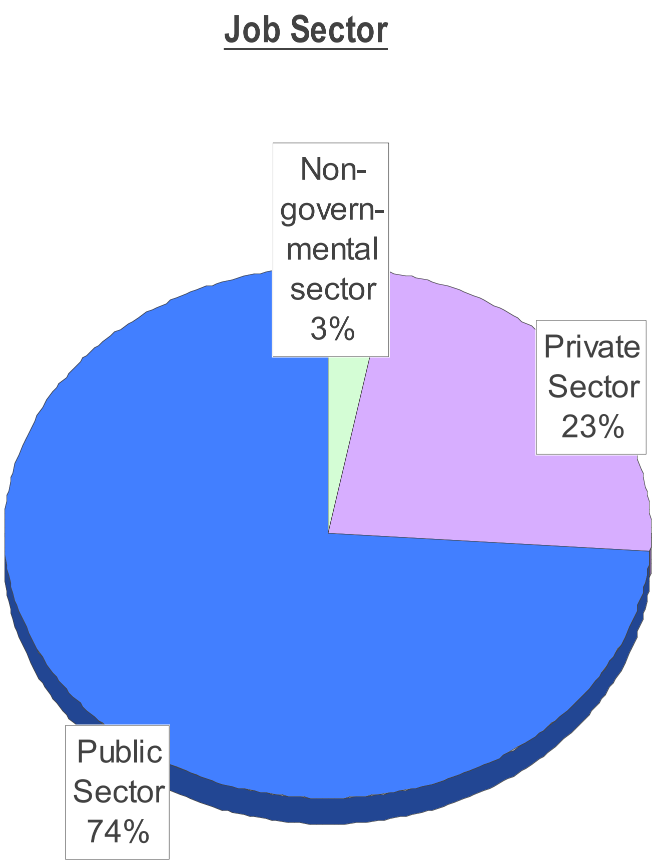


Demographic Profile (cont'd)

WHERE PIBC MEMBERS LIVE – COMMUNITY

- Over one-third of respondents live in an urban metropolitan centre with a population exceeding 500,000. Interestingly, the next largest group, which is over 20%, live in either a small rural town or community with a population less than 50,000. Next and equal in distribution at 13% are those who live in urban regional centres—with a population between 100,000 to 500,000—and those residing in smaller cities or towns of 50,000 to 100,000. Lastly, are two groups each comprising less than 10%, who either live in large suburban metro centres of more than 500,000 or suburban regional areas with a population between 100,000 and 500,000.
- When added together, all those who live in rural towns or communities and those living in smaller cities or towns reach one-third of the total PIBC membership, nearly as many as those who live in a large, urban metro centre.

Economic Profile



Percent of Total Respondents (n=308)

EMPLOYMENT – SECTOR

- Nearly three-quarters of respondents state their current or last job is/was in the public sector. A further 3% identified the non-governmental (non-private) sector where they hold/held jobs. Just under one-quarter of PIBC members work in the private sector.

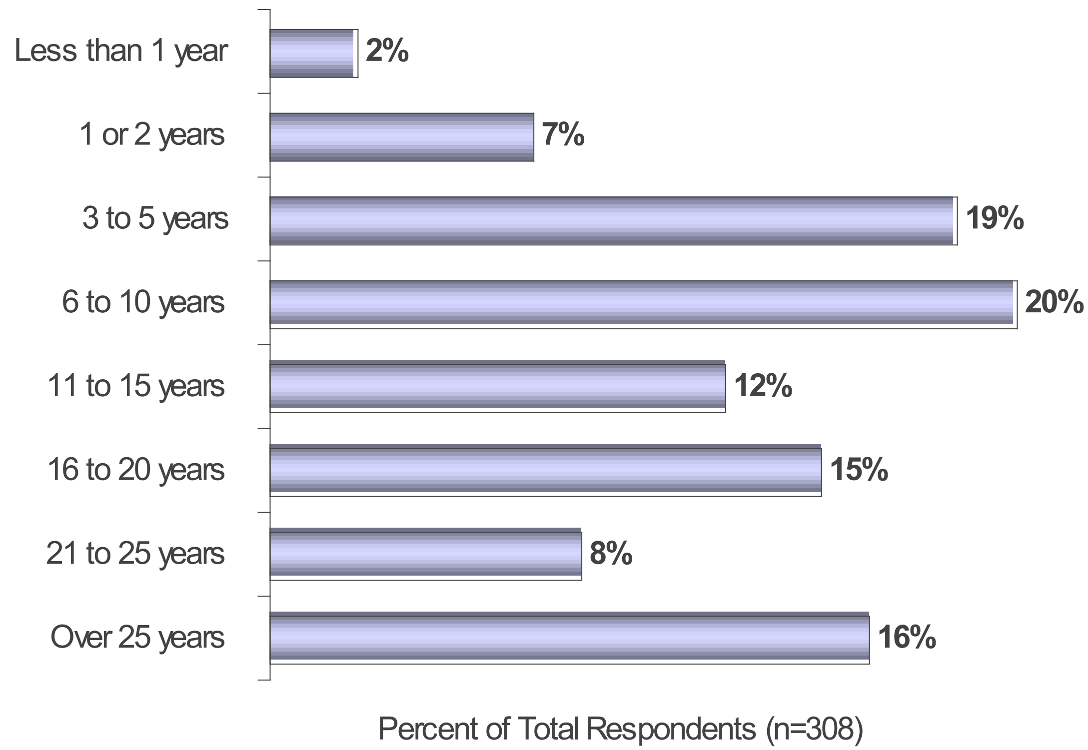
EMPLOYMENT – CURRENT PLANNING JOB

- Over 70% of the PIBC membership currently work for some level of government or tax payer funded endeavour. By far—61% of total respondents—currently work for municipal, regional or First Nations governments.
- Slightly under one-quarter of respondents are presently working for the private sector.

Economic Profile (cont'd)

YEARS OF PLANNING EXPERIENCE

- There is a solid percentage of respondents with between 6 to 20 years experience (47%) who, presumably, will continue on into the most senior levels of planning.
- The smallest (and youngest) groups of respondents have less than one year of experience (2%) and one to two years' experience (7%). This may be indicative of a decline in the number of opportunities for first-time planners to enter the industry or may indicate that individuals in planning are waiting until after they have gained some experience before joining the institute.



Economic Profile (cont'd)

TYPE OF WORK

- Members engage in a wide rage of planning:
  - Most respondents are either planning generalists (29%) or are involved in current planning or general land use and development (21%);
  - 11% of members deal with long-term planning of general land use and development;
  - 6% of members are policy planners; and,
  - 6% work in environmental planning.

CURRENT JOB DESCRIPTION

- Of note:
  - Consultancy work is represented by 16% of respondents;
  - Planning managers, assistant directors or senior executives comprise 12% of members, as do senior planners (12%) and directors of planning (12%); and,
  - Planner I, Planner II, and Planner (Generalist) each are represented by 10% of the membership.

Economic Profile (cont'd)

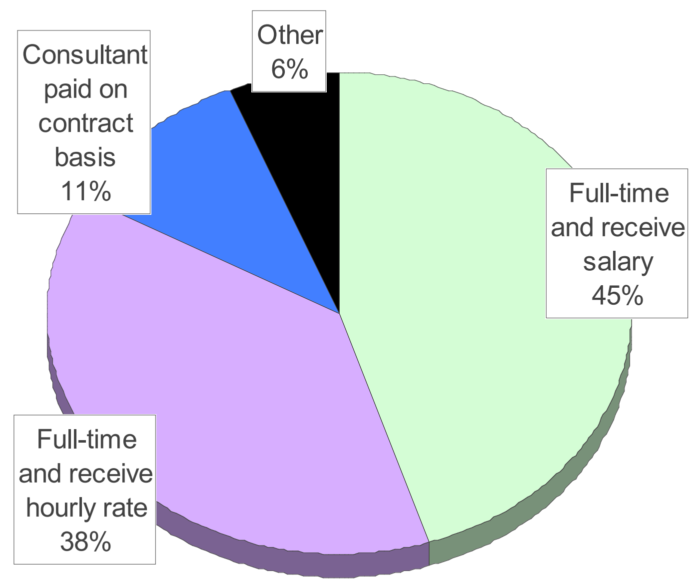
EMPLOYMENT SITUATION

- As shown in the pie chart, 45% of respondents are employed full-time and receive salaried compensation
- Close to 4-in-10 members (38%) are full-time and paid hourly.
- 11% are consultants and paid on a contract basis.

ANNUAL INCOME

- The annual average income for members is $75.3 thousand.
- Annual pay varies most by the following characteristics:
  - Males earn an average of $81.5K versus $69.0K for women;
  - Lower Mainland members average $78.6K versus $71.7K for members in other areas;
  - Those working in the public sector average $72.4K versus $85.1K in the private sector; and,
  - Average income rises significantly with years in the practice:
    - $58.6K per annum with 5 years or less experience;
    - $72.7K per annum with 6 to 15 years; and,
    - $91.4K per annum with 16 years or more.

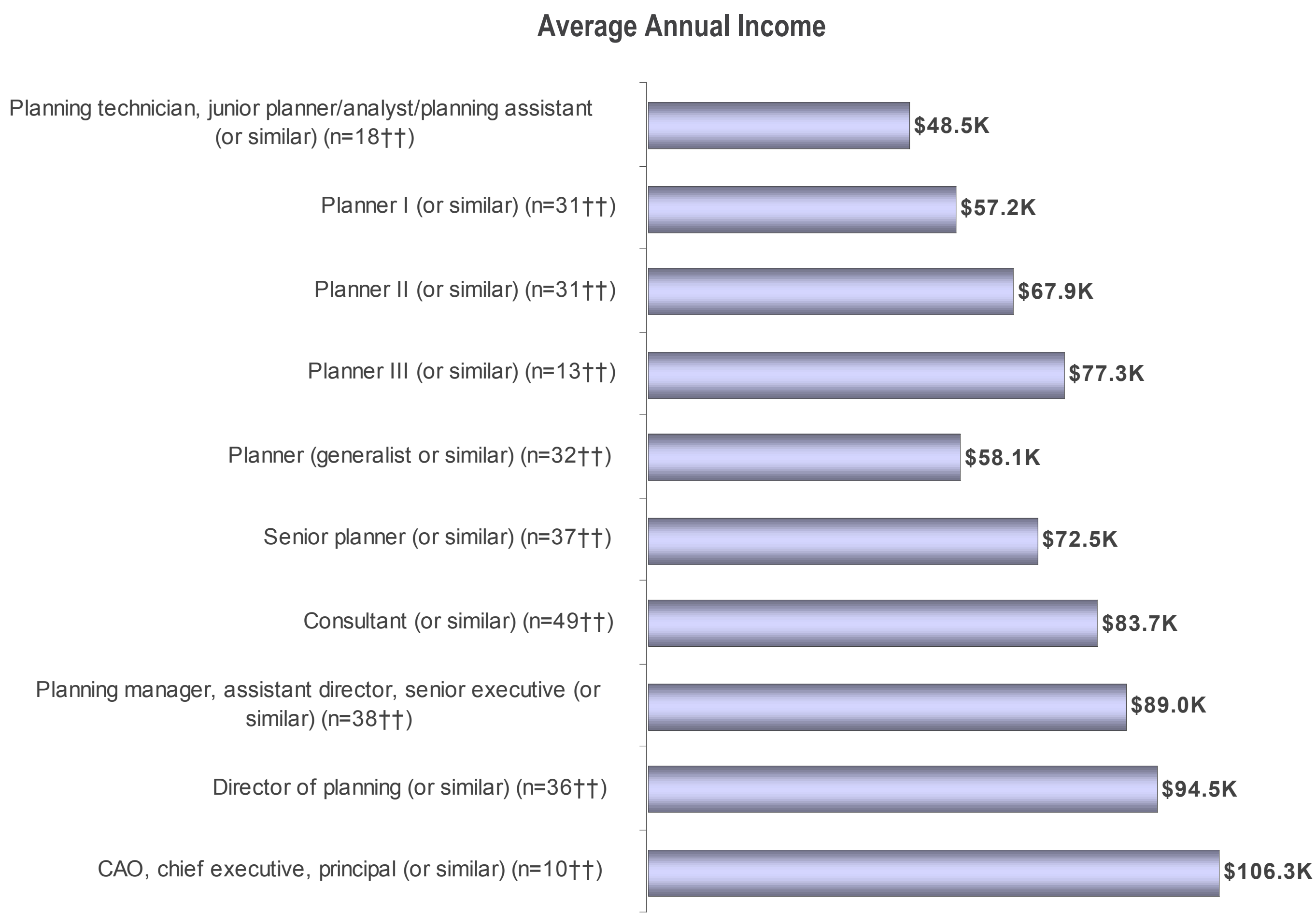
Employment Situation



Percent of Total Respondents (n=308)

Economic Profile (cont'd)

Reported average annual incomes also vary by planning position, as shown in the chart below.



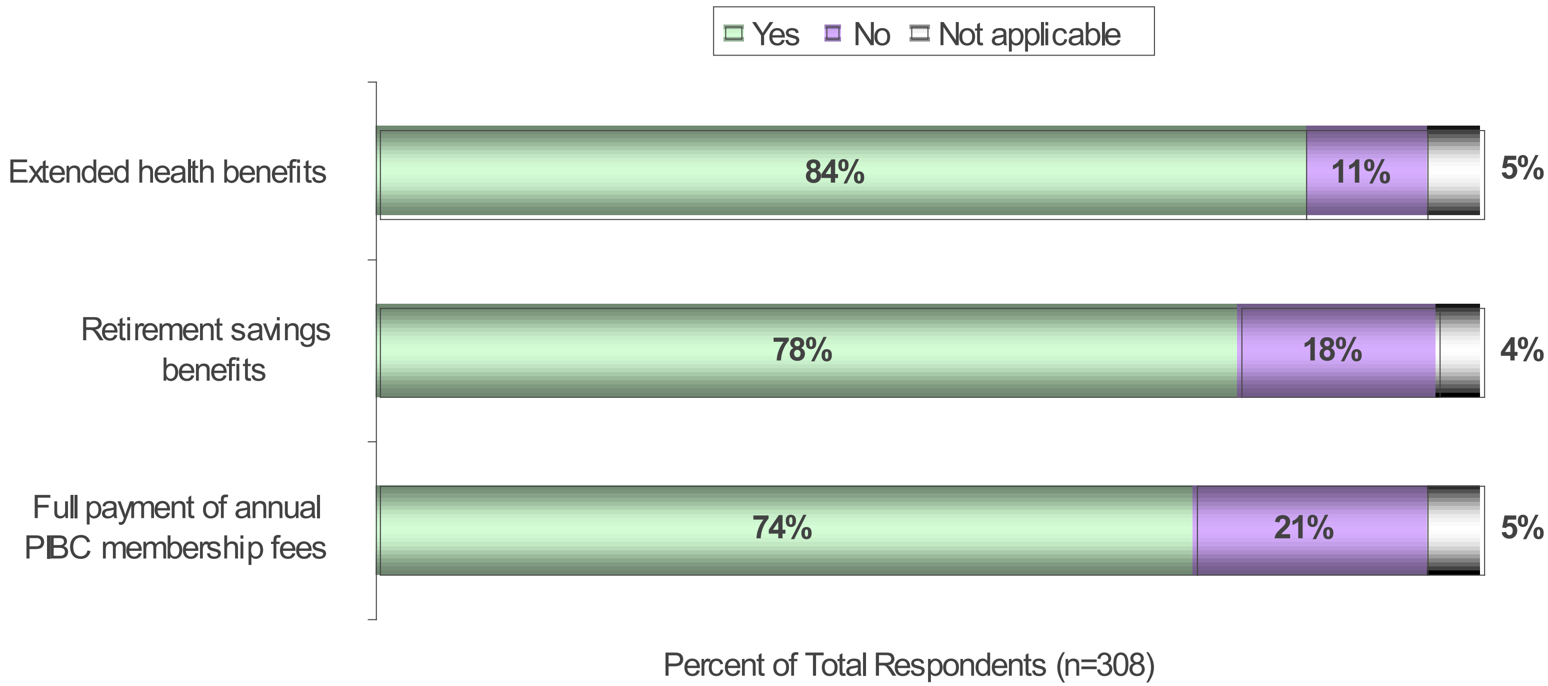
†† Data based on sample sizes of less than 50 should be interpreted with **extreme** caution.

Economic Profile (cont'd)

NON-SALARY BENEFITS

Public sector employees are significantly more likely to receive:

- Extended health (92%) than those in the private sector (60%);
- Pension or other retirement savings benefits (94%), than those in the private sector (31%); and,
- Full payment of annual PIBC membership fees (77%), than those in the private sector (65%).



Economic Profile (cont’d)

PAID VACATION

- The average number of paid vacation weeks is 3.7 weeks. In addition to other benefits cited, public sector employees are far more likely to receive longer paid vacations—close to four weeks, on average—than the private sector annual vacation leave of just under three weeks.
- In addition, pubic sector members receive these longer vacations sooner into their tenure than those in the private or non-governmental sectors.
- As one-quarter of private or non-governmental employees responded with “not applicable/none of the above” to this question. This may indicate that this group may not receive any paid vacation per se.

OVERTIME COMPENSATION

- One-third of respondents said “yes” to receiving a combination of overtime pay and time off in lieu of overtime pay.
  - This choice of combinations of pay or time off in lieu of is almost exclusively in the domain of the public sector.
- One-quarter of respondents said “yes” to only receiving time off in lieu of overtime worked.
  - In this case, the majority of respondents receiving time off in lieu of are from the private sector.
- 17% chose “other” forms of compensation including:
  - Bonuses;
  - Professional development and vacation time in the summer;
  - Partial time off in lieu of;
  - Extra vacation; and,
  - Overtime is required, but not compensated.

Economic Profile (cont'd)

PROFESSIONAL DEVELOPMENT ASSISTANCE

Annual Financial Assistance/Paid Time Off (Potential)

- 86% of respondents state their employers provide some form of support for professional development, education or training.
  - Over 70% of respondents can receive both financial support and paid time;
    - Public sector employees are significantly more likely to have this option available to them.
  - Just under 10% can receive financial support, but not time off; and,
  - 4% can receive paid time, but not financial support.

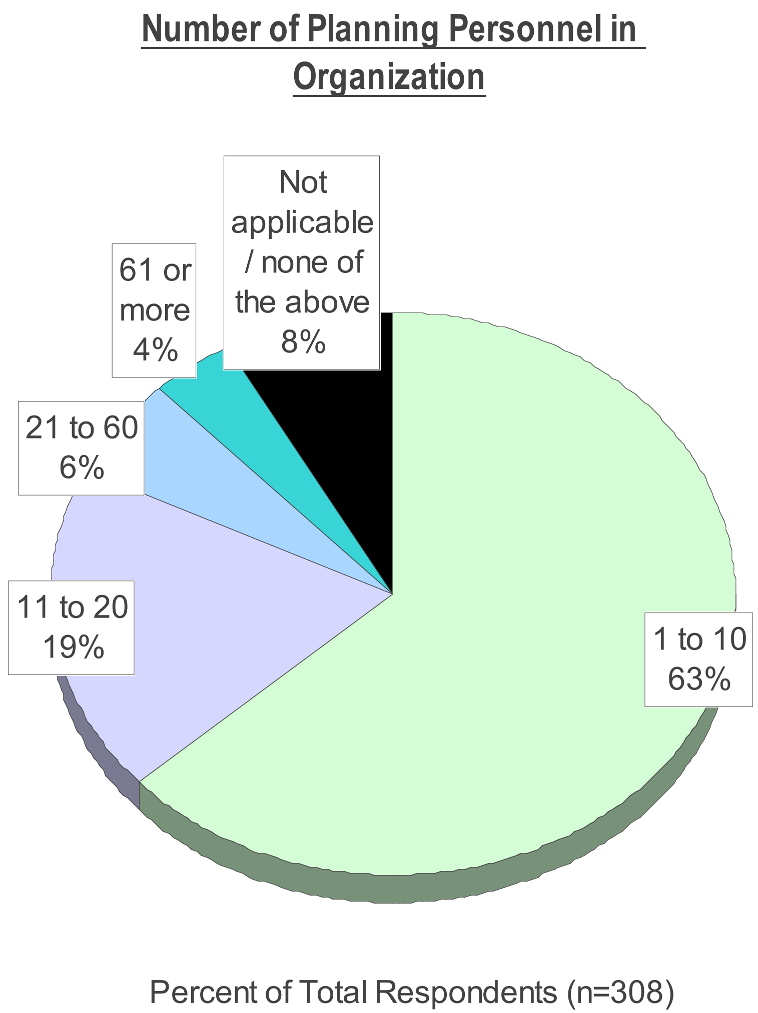
Annual Financial Assistance

- 59% of respondents are sure that they received financial support for professional development in the last year. (A large percentage [36%] were unsure.) The average financial assistance for members is $2.3K.

Annual Paid Time Off

- 60% of respondents are sure that they received time off for professional development in the last year. (A large percentage [35%] are unsure.)
  - The average number of professional development days reported was 5.5 days.

Work Place Trends



NUMBER OF EMPLOYEES IN FIRM

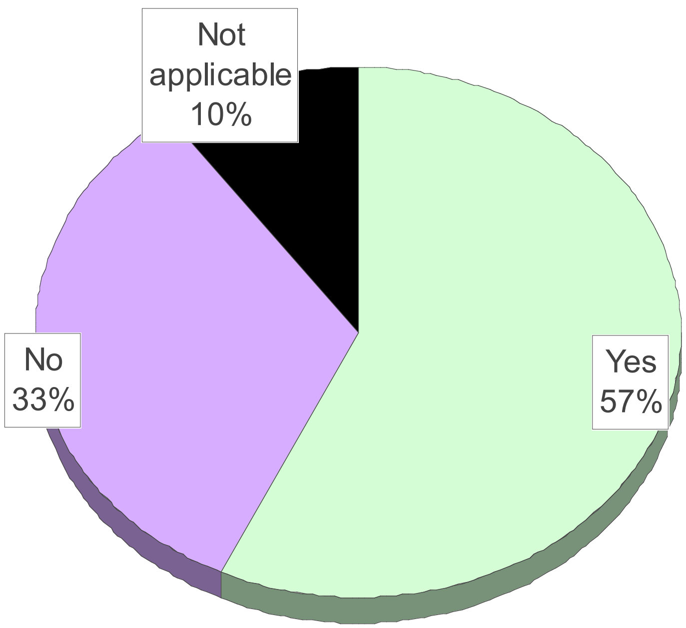
- Nearly 65% of PIBC members work along side one to 10 planners/staff in their organization.
- Nearly 20% have between 11 to 20 colleagues in the office.
- Only 4% of respondents work in large organizations with 61 or more planning employees.

Work Place Trends (cont'd)

SUPERVISION RESPONSIBILITIES

- As illustrated in the pie chart, 57% of members have supervisory responsibilities.
- About 60% of supervisors are male and only 40% are female.
- Propensity to be a supervisor increases significantly with years in the practice:
    - Only 18% of those with 5 years or less in the practice are supervisors;
    - 32% of those with 6 to 15 years are supervisors; while,
    - 50% with 16 years or more are supervisors.
- The number of employees/contractors supervised by these members are as follows:
    - 78% of members have from 1 to 5 people under their supervision;
    - 19% are overseeing 6 to 15 employees; and,
    - 3% are responsible for 16+ employees.

Members With Supervisory Responsibilities



Percent of Total Respondents (n=308)

Work Place Trends (cont'd)

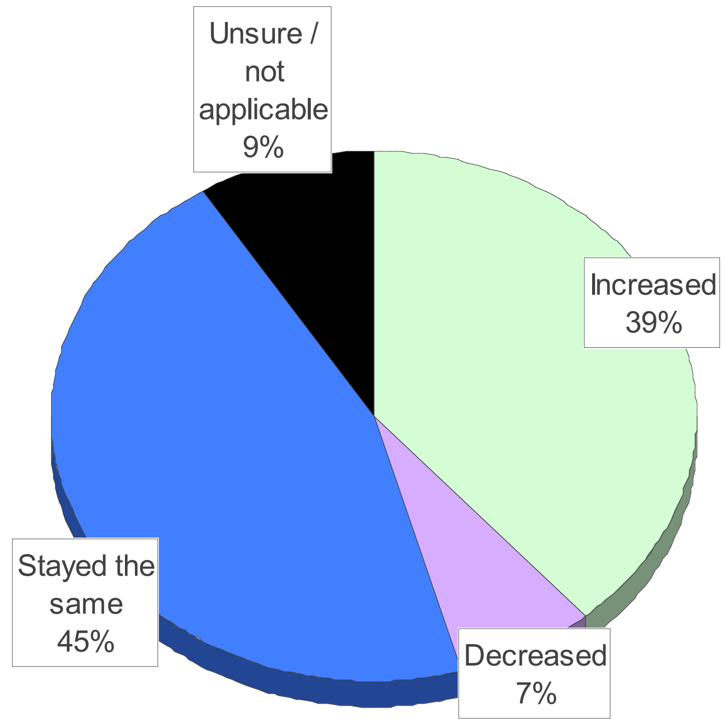
WORKLOAD – HOURS/WEEK

- PIBC members report that they work an average of 40.7 hours weekly. Some work longer hours than others as follows:
  - 52% of respondents work between 21 and 40 hours per week;
  - Another 35% work between 41 and 61 hours per week; and,
  - 2 % work 61 or more hours weekly.

WORKLOAD VERSUS PREVIOUS TWO YEARS

- As illustrated, the largest proportion of members (45%) say the hours worked have stayed the same over the past two years.
- Almost 40% of respondents think that their hours worked has increased.
  - Members between 40 and 49 years are more likely than any other age group to say their work hours have increased.

Change In Hours Worked In Past Two Years



Percent of Total Respondents (n=308)

Work Place Trends (cont'd)

PERSONNEL CHANGES AND TURNOVER

- There appears to be a significant turnover in planning organizations and firms:
  - 44% of members estimate a turnover of between 1 to 3 people in their firm/organization in the past year; and,
  - 65% estimate a turn over of 1 to 10 or more in the past year.

When: Leaving Your Current Job

- However, when asked when they might leave their current planning position for any reason, respondents appear less keen to move.
  - 32% said they are not intending to leave in the foreseeable future;
  - 26% do not plan a move within the next 1-1/2 years;
  - 15% will not assess that possibility until after another three years has passed; and,
  - 7% will consider a move in the next two or three year period.

Why: Most Likely Personal Reasons for a Job Change

- When respondents do get around to considering a move, the number one reason (35%) is to seek new challenges or opportunities in a new organization or firm. Furthermore:
  - 18% of planners will be lost to retirement;
  - 12% will leave because of a perceived poor work environment;
  - 11% see new challenges/opportunities/promotions in their existing organization; and,
  - 10% see a geographical move motivating a change.

Work Place Trends (cont'd)

ANTICIPATION OF RETIREMENT

- The planning industry, like many others, will see large numbers leaving the profession for retirement. In this survey, just 18% of all members anticipate retiring in the foreseeable future.
- Expected retirement horizons for these members are as follows:
  - About 10% will leave the profession within the next year;
  - 20% more will leave in two years;
  - 48% of these members anticipate retiring with the next five years; and,
  - The remainder (about 22%) intend to retire sometime after five years but within the next ten years.

RETIREMENT STATUS

- Retirement for professional planners has several definitions and does not automatically mean full withdrawal from the profession. When asked future intentions, responses were as follows:
  - 58% of those intending to 'retire' do plan to continue practicing on a limited or part-time basis;
  - Further, 23% will officially retire but will stay active in the profession through volunteering, mentoring and other activities; and,
  - About 13% are not sure yet whether they will stay active or fully leave the profession at retirement.

Programs and Services: Value

Members were asked to indicate how valuable or how useful a list of PIBC amenities are:

- Planning West Magazine
  - 51% of PIBC members find *Planning West* Magazine a 'most valuable' or 'valuable' resource.[2]
- PIBC Website
  - 50% of members find the PIBC website as a 'most valuable' or 'valuable' resource.
- PIBC Email E-news
  - 70% of PIBC members find the PIBC email E-news as a 'most valuable' or 'valuable' resource.
- PIBC Annual Conferences
- 56% of members find PIBC annual conferences as a 'most valuable' or 'valuable' resource:
  - 22% of members have a 'neutral' attitude to the annual conferences; and,
  - 14% give a 'least valuable/not valuable' rating.
- PIBC Local Chapter Events & Activities
  - Equal numbers of members either give Local Chapter Events & Activities a rating of 'most valuable' or 'valuable' (31%), 'neutral' (29%), or 'least valuable/not useful' (31%).
  - Almost 10% are unsure.
- PIBC Certification & Registration
  - 63% of PIBC members find PIBC Certification & Registration as a 'most valuable' or 'valuable' resource.

2 Sometimes called a top-2 box percentage, this is the percent of members giving a 4 or 5 rating, based on a five-point scale where 5 is 'most valuable/useful' and 1 is 'least valuable/useful'.

Programs and Services: Value (cont'd)

- PIBC Continuing Professional Development System
  - Only 38% of members find the PIBC CPD System as a 'most valuable' or 'valuable' resource.
    - 30% of members have a neutral attitude to the CPD;
    - 22% give a "least valuable/not valuable" rating; and,
    - 9% are "unsure" of its effectiveness.
- PIBC Awards Program
  - Notably, 54% of PIBC members rate the PIBC Awards Program as a 'least valuable/not valuable' resource.
- PIBC Mentoring Program
  - Only 14% of members find the Mentoring Program as a 'most valuable' or 'valuable' resource.
- PIBC Administrative Office
  - 39% of members find the PIBC Administrative Office as a 'most valuable/valuable' resource.
- CIP Errors & Omissions Liability Insurance Program
  - Fewer respondents give a 'most valuable/valuable' rating (31%) than a 'least valuable/not valuable' rating (32%) to the CIP Errors & Omissions Liability Insurance Program.

Services: Improvements/Enhancements

TOP SIX SERVICES TO BE IMPROVED OR ENHANCED

The ratings for improvements and enhancements of the top six PIBC services are:

- Local Chapter Events & Activities (50%);
- Website (32%);
- Certification/Recognition (23%);
- Annual Conferences (22%);
- Mentoring Program (21%); and,
- Continuing Professional Development System (18%).

The exhibit summarizes the ratings given to all 11 PIBC services and displays the percentage of members who 'voted' for improvements in ten of the PIBC services and benefit programs.

PIBC Services	**Average Value/ Usefulness Rating***	**Percent of Members Voting For *Improvement***
Planning West Magazine	3.5	N/A
PIBC Website	3.5	32%
PIBC Email E-News	4.0	8%
Annual Conferences	3.7	22%
Local Chapter Events and Activities	3.0	50%
Certification and Registration	3.9	23%
Continuing Professional Development Program	3.2	18%
PIBC Awards Program	2.3	9%
PIBC Mentoring Program	2.3	21%
PIBC Administrative Office	3.2	6%
CIP Errors and Omissions Liability Program	3.0	4%
Unsure—Not Applicable	*Varies from 1% to 19%*	*No rating given*

* Based on a five-point scale with 5 as 'most valuable/useful' and 1 as 'least valuable/useful'.

Detailed Tables

Explanation of Notations Used in Detailed Tables

*	Percent	<	.05
-	Percent	=	0

Notes: Percentages derived from “actual” bases of less than 100 should be interpreted with caution.

Percentages derived from “actual” bases of less than 50 should be interpreted with extreme caution.

Items listed below any subtotal may not exactly add to the subtotal through computer “rounding” (applies to 1) weighted frequencies where decimal not shown or 2) where percent shown without decimal).

Standard Deviation

The standard deviation is calculated by taking the square root of the variance around the mean. It is a summary statistic of variation printed below the mean. The standard deviation gives an idea of the likely variation around the mean if we are simply considering the mean as a descriptive statistic. When standard deviation scores are small relative to the mean, means can be taken as good representatives of the individual scores.

Standard Error

The standard error is calculated by dividing the standard deviation by the square root of the sample size. The standard error indicates the likely deviations that can be expected and, therefore, the confidence limits.

For example, mean ± 2 standard errors will include the “true mean” 95% of the time.

Significance Tests

As with all survey data collected by sampling a subset of a universe, the data presented herein are subject to sampling error. In order to facilitate comparisons between subgroups of respondents in this research, statistical testing has been performed on the data in the tables to follow.

The data have been tested to determine if there are differences between subgroups that are greater than those which would be expected as a result of sampling error. For instance, the data based on male respondents are compared to those based on females' responses to determine if there is a statistically significant difference.

Each column in the detailed tables is designated with a letter label, starting with the first column as "A." This letter is then used to designate data where subgroups differ in their responses. As shown in the following example, members under 35 years of age are significantly more likely to work overtime more than three times per week, as compared to older members.

	Age of Members …		
	Total	**Under 35 Years**	**35 Years or More**
Base For % (Actual)	(500) A	(208) B	(292) C
Frequency of Overtime Work:			
Over Three Times per Week	32.4	40.4C	26.7
Once per Week	24.2	24.0	24.3
Twice per Week	22.4	21.6	22.9
Less than Once per Week	21.0	13.9	26.0B

The differences have been calculated using the standard error of difference (S.Ed). Differences that are significant at the 95% confidence interval are denoted with capital letters, those at the 90% level with lower case letters.

Appendix

- Questionnaire

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