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**Subject:** 2022 Niagara Region Employment Inventory Results

**Report to:** Planning and Economic Development Committee

**Report date:** Wednesday, March 8, 2023

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## **Recommendations**

1. That this report **BE RECEIVED** for information; and
2. That PDS 6-2023 **BE CIRCULATED** to the Local Area Municipalities, Local Economic Development Offices, Workforce Collective, the Niagara Chambers of Commerce and Brock University.

## **Key Facts**

- This report highlights the key performance indicators of the data collected during the 2022 Niagara Employment Inventory (NEI) period.
- The NEI is a direct data collection exercise (inventory and questionnaire) where a small team of post-secondary students inventory businesses and where possible contact publically accessible (signed) businesses in person within Niagara during the summer months. The inventory is completed annually.
- The Region began conducting the NEI in 2016. The NEI has not been conducted since 2019 due to public health restrictions imposed in an effort to contain the COVID-19 pandemic, as well as concerns regarding low response rate and poor sample quality if conducted remotely. The NEI was reinitiated in 2022.
- The 2022 NEI team inventoried a total of 13,033 businesses throughout Niagara and received 5,811 completed questionnaires, which captured location of 112,501 full and part-time jobs and the associated data about the jobs reported by businesses who chose to participate in the questionnaire.
- Data captured through the NEI is shared with and is a key asset for internal Regional departments, local area municipalities, Brock University and the Workforce Collective. A subset of the data collected is also published to Open Data to make it available to the public.

## **Financial Considerations**

The NEI was funded through the Council-approved 2022 operating budget and has been included in the approved 2022 Planning and Development Services base budget.

## **Analysis**

Niagara Region is among several municipalities in Ontario that collect workplace and employment data. Since 2016, Planning and Development Services has worked closely with Economic Development to collect primary data on the types and sizes of businesses operating in Niagara.

The NEI has not been conducted since 2019 due to public health restrictions imposed by all levels of government to help contain the COVID-19 pandemic. Given that the primary data collection method for the NEI is through in-person interviews, the project was halted as risks related to the health and safety, and the probability of a low response rate and poor sample quality were high.

Prior to the two year reporting gap, the NEI was and will continue to be conducted annually by a small team of post-secondary students between the months of May and September. The primary data collection method is through door-to-door, in-person interviews with local business owners, with additional follow-up engagement conducted through email and telephone communication.

The data collected has become vital to monitoring the region's economic health, as well as aiding in decision and policy making. The information collected over the years has cumulated into a comprehensive dataset of business information that provides the ability to analyze the regional employment landscape over time. The inventory is a geo-coded, spatially enabled dataset that facilitates analysis at a street-address level.

The business questionnaire (included as Appendix 1) was developed based on best practices from other municipalities in the Greater Toronto and Hamilton Area, as well as through consultation with the following stakeholders and experience gained over the years from administering the project:

- Internal Regional departments;
- Local area municipalities;
- Local economic development offices,
- Brock University; and
- Workforce Collective (formerly the Niagara Workforce Planning Board).

Each year, the NEI questionnaire features a core set of questions that are tailored to gain fundamental insight into the local business community. These questions remain unchanged from year to year to enable the ability to compare results over time. The core questions are in alignment with employment questionnaires administered by our municipal counterparts in the Greater Toronto and Hamilton Area.

This year, two new categories were added to the questionnaire focused on (1) diversity, equity and inclusion and (2) work from home. These questions were added to gain an understanding of the demographic characteristics of the business community, and to provide insight into the number of businesses with employees working from home.

Participation in the NEI is voluntary. Despite best efforts, the project team is unable to make direct contact with all business owners or, occasionally, a business declines to participate. Due to these factors, the reported results may not fully align with other surveys conducted by Statistics Canada or other interest groups as only the jobs captured during the inventory period are reported on.

In 2022, the NEI team inventoried 13,033 businesses and received 5,811 completed questionnaires, which captured the physical location of 112,501 full and part time jobs.

Compared to 2019 results, this is an increase of over 1,000 inventoried businesses, with a decrease of over 35,400 jobs identified. It is important to note that the number of jobs reported is not a reflection of the local job market, but rather is the result of a lower participation rate compared to 2019, and that the total number of businesses inventoried includes businesses observed to no longer be in operation or vacant.

Niagara Region considers the results of the 2022 NEI to be successful in light of the two year reporting gap and challenges associated with the COVID-19 pandemic. Staff turnover and changing business operations became an obstacle when trying to engage businesses, largely because the contact information in the NEI database became outdated, and the project team had to refresh and/or reintroduce the inventory to the Niagara business community.

## **Results**

Table 1 illustrates the proportion of complete and partially complete inventory records from 2016-2019, and in 2022. A complete inventory record indicates that a business provided responses to the inventory questionnaire from beginning to end (“complete questionnaire”), or the business was confirmed to be permanently closed or vacant.

Partially complete records indicate the inventory team was not able to make direct contact with a business representative. In these cases the project team still captures several key attributes, such as verifying the physical location of the data point and associated sector and industry codes. The NEI continues to see a low rate (less than 1%) of businesses, who when contacted, decline to participate.

Table 1 – Inventory Completion Rate

Year	Complete Inventory Record	Partially Complete Record	Declined to Participate
2016	68%	30%	2%
2017	76%	22%	2%
2018	87%	12%	1%
2019	90%	9%	<1%
<b>2022</b>	<b>75%</b>	<b>24%</b>	<b>&lt;1%</b>

A steady increase in the completion rate was observed from 2016-2019. The gradual increase prior to the COVID-19 pandemic can be attributed to greater familiarity with the project team, a streamlined data entry methodology, and joint communication outreach conducted by our local Chambers of Commerce and other interest groups. In 2022, a completion rate of 75% was achieved. The completion rate in 2022 is very strong considering the challenges associated with the two year break and having to refresh or reintroduce the inventory to businesses.

### Job Type Results

Appendix 2 illustrates the number of businesses inventoried and jobs captured within complete questionnaires in the 2022 NEI by sector based on the 2-digit North American Industry Classification System (NAICS). The NAICS was established by statistical agencies of Canada, Mexico and the United States. It is a standardized industry classification system used to categorize business establishments based on the type of economic activity of the business.

Based on the number of businesses inventoried, the top three sectors observed in 2022 were: Retail Trade (22.9%), Accommodation and Food Services (15.0%) and Other Services (13.7%)<sup>1</sup>. When combined, these sectors make up of over half of all the businesses captured in the inventory.

Based on the number of jobs captured in complete questionnaires, the top three sectors observed in 2022 were: Retail Trade (18.0%), Accommodation and Food Services (15.8%), and Educational Services (13.3%). Together, these sectors make up 47.1% of the total jobs captured in complete questionnaires.

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<sup>1</sup> Other Services includes repair shops, personal care facilities and laundry services, among other industries.

## **Business Closures and Openings**

Since 2019, approximately 1,343 businesses inventoried have been identified as no longer being in operation or vacant. The top three sectors that experienced business closures were Retail Trade; Accommodation and Food Services; and Health Care and Social Assistance.

Over the same period, approximately 994 new businesses were identified in the inventory. The top three sectors that new businesses were observed in are: Retail Trade; Accommodation and Food Services; and Other Services (Except Public Administration).

## **Distribution of Inventoried Businesses and Number of Jobs by Municipality**

Appendix 2 contains a table that illustrates the municipal breakdown of the number of businesses and jobs reported over the five year inventory period. As mentioned above, the total businesses inventoried includes businesses observed to no longer be in operation or vacant, and total jobs reported are only for complete questionnaires.

## **Work from Home**

Public health restrictions prompted many sectors to modify how they operate to address rapidly changing circumstances. The 2022 NEI questionnaire was expanded to help establish an understanding of these workplace modifications, through questions focused on employees working from home, return to work plans and changing space needs.

In total, 566 businesses reported having staff working from home, representing approximately 7,463 employees. The majority of employees working from home were in the Educational Services (49.4%), Manufacturing (8.6%), and Professional, Scientific and Technical Services (7.3%). The majority of businesses that responded did not report a change in space needs, with 662 businesses needing more space and 150 businesses needing less space.

## **Diversity, Equity and Inclusion**

Niagara Region is the first municipal employment questionnaire in the Golden Horseshoe to include questions pertaining to Diversity, Equity and Inclusion (DEI). These questions were added in 2022 to gain a baseline understanding of demographic characteristics of the leadership teams in the Niagara business community.

Table 2 provides a summary of the responses to the questions in the newly added DEI section. Businesses were asked whether the majority of the business (+50%) are owned or led by individuals that identify as:

- Person who identifies as a woman;
- First Nations, Inuit or Métis person;
- Person who identifies as a member of the 2SLGBTQQIA+<sup>2</sup> community;
- Person who identifies as being disabled;
- Youth (Less than 18 years old); or
- Person who identifies as a visible minority.

Respondents could also choose to decline to answer each question.

Table 2 – Diversity, Equity and Inclusion Responses

Response	Women Led	2SLGBTQQIA+ Led	Disability Led	First Nations, Inuit, Metis Led	Visible Minority Led	Youth Led
Yes	942	69	35	29	182	13
No	1,147	1,937	2,021	2,051	1,832	2,079
Decline	1,452	1,500	1,458	1,445	1,491	1,416

Respondents were given the option to complete the DEI section in person or online. Of the 5,811 business owners that submitted questionnaire responses, approximately 2,300 left these DEI questions blank and approximately 1,400 declined to answer.

Staff in the DEI and Indigenous Relations team are reviewing the responses to these questions to better understand the high level of incomplete answers and to develop strategies to increase response rates in the future. This data will also be used to inform ongoing DEI initiatives at the Region.

### Utilizing NEI Data

The data collected each year through the NEI provides detailed local business information that is not available through Statistics Canada data. In most cases, Statistics Canada data is updated once every five years, whereas the NEI is updated on a yearly basis, excluding the two year data gap prompted by the COVID-19 pandemic.

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<sup>2</sup> Two Spirit, Lesbian, Gay, Bisexual, Trans, Queer, Questioning, Intersex, Asexual, and all other sexual orientations and genders.

Statistics Canada data remains the authoritative data source for performing analysis at regional and municipal level geographies, but lacks the ability to analyze raw business data at the street address level. Collecting annual business data at the street address level allows for detailed analysis to be carried out at custom geographies and time series.

The NEI results are used in conjunction with Statistics Canada data and other data sources to accurately monitor the regional economy. This allows for a better understanding of where the Region can take action to help facilitate economic growth and understand the changes that have taken place during the two year reporting gap.

Reliable business data is an integral resource to better understand the region's employment context. This dataset plays a significant role in supporting decisions related to: population and employment growth, infrastructure investment (including public transit), economic development inquiries, and the ongoing monitoring of economic conditions and trends.

In addition to supporting decision making, the data collected over the years has been used by the Region to facilitate analysis to support and add value to various projects. Below are examples of projects that the NEI data has been used for:

- South Niagara Hospital Project Business Directory;
- Niagara Official Plan Land Needs Assessment;
- Niagara Region Waste Collection Contract Review; and
- Brock University Sports Market Research.

Economic Development also uses the NEI data to connect businesses to supply chain opportunities, support international promotion through the Niagara Canadian Business Directory, and to assist in analyzing the regional economy.

### **Rebuilding Relationships**

The NEI also provides a key opportunity for the Region to personally connect with local businesses in order to further develop partnerships and foster an environment for innovation and development within the Niagara business community. Staff turnover and changing business operations became an obstacle when trying to engage businesses, largely because the contact information in the NEI database became outdated. Given the two year reporting gap, the project team focused on rebuilding relationships with the business community in 2022. To do so, the project team sought to educate business representatives on the value of the data relative to how it is used by the Region and local municipalities, and provided an opportunity to listen to any comments or concerns.

Addressing concerns of business owners continues to be an important step in building and maintaining strong working relationships with the community. On occasion, concerns were expressed by business owners, which were addressed immediately by the project team. Where the project team could not address the concern, the business owner was referred to resources available at the Region, such as the Waste Management Info-Line or local business support services.

Table 3 highlights the responses received when business owners were asked “Is there anything Niagara Region could do to help support your business?” For reporting purposes, the responses have been categorized into themes only. The raw comments are shared with applicable internal departments, and with local municipal partners.

Table 3 - “Is there anything Niagara Region could do to help support your business?”

<b>Response Themes</b>	<b>Responses Received 2022</b>	<b>Proportion 2019</b>	<b>Proportion 2022</b>
Infrastructure/Traffic Issues/Construction	290	11.0%	17.3%
Waste Management	265	3.6%	15.8%
Taxes and Utilities	209	18.2%	12.5%
Business Exposure	193	16.4%	11.5%
Social Support Programs/Programs	109	3.6%	6.5%
Incentives/Grants/Contracts	104	7.5%	6.2%
Skills and Labour Force	103	12.1%	6.2%
Health and Safety	92	5.4%	5.5%
Parking Issues	92	5.3%	5.5%
Impact of COVID-19	50	N/A <sup>1</sup>	3.0%
Development Process/Zoning/Land Use	46	3.4%	2.7%
Awareness and Education	39	1.7%	2.3%
Beautification	28	N/A <sup>1</sup>	1.7%
Transit	26	4.7%	1.6%
Governance	20	N/A <sup>1</sup>	1.2%
Development Charges	7	0.6%	0.4%
<b>Total</b>	<b>1,673</b>	<b>100%</b>	<b>100%</b>

<sup>1</sup> These themes were added in 2022 to reflect responses from the business community.



## **Open Data**

Each year, a subset of the NEI results are released to the public through the Niagara Region Open Data Portal. Open Data places information in the hands of the public, promoting innovation and fostering greater transparency and accountability. The following attributes from the Employment Inventory dataset are made available to the public including, business name, location information, 6-digit North American Industry Classification System (NAICS) code, and employee size categories.

## **Alternatives Reviewed**

Council may choose to purchase macro-level employment data from a secondary source, which is costly and aggregated to larger geographies. Secondary data sources are generally not published as frequently and do not provide the same level of detail when compared to primary data collected by the Region.

Purchasing secondary data is not recommended given that it will not address the data gap that the NEI was initially implemented to resolve and it will not provide the same level or quality of data. Continuing to collect primary data annually provides a baseline to analyze historical trends, forecast employment growth, supplement other employment sources and provide a resource back to the community. Conducting the NEI in house also allows for the questionnaire to be customized to address the changing needs of the Region and interested parties.

The goal of the NEI is to update the data on an annual basis to monitor, understand and track changes in the employment landscape over time. With successive years of data collection, historic analysis of the data will show how specific businesses, sectors and geographic areas in Niagara evolve over time as our economy changes. It also provides an opportunity for the Region to build relationships with the business community through direct, in-person engagement with staff.

## **Relationship to Council Strategic Priorities**

The NEI is a key tool that the Niagara Region uses to strengthen its economic competitiveness by better understanding its current employment landscape and workforce composition.

The NEI project supports Council's strategic priorities of supporting business and economic growth, establishing a healthy and vibrant community, responsible growth and infrastructure planning and a sustainable and engaging environment. Data collected through engaging the business community is used to inform decision-making related to population and employment growth, infrastructure investment, public transit planning, economic development, and the ongoing monitoring of economic conditions.

The Niagara Region and Area Municipalities rely on this dataset as a valuable asset when developing robust business cases designed to attract investment, innovation, and entrepreneurship to Niagara and strengthen the Region's position globally.

### **Other Pertinent Reports**

- PDS 13-2016 – Niagara Region Employment Survey
- PDS 1-2017 – Niagara Region Employment Inventory Preliminary Results
- PDS 5-2018 – Niagara Region 2017 Employment Inventory Results
- PDS 6-2019 – Niagara Region 2018 Employment Inventory Results
- PDS 5-2020 – Niagara Region 2019 Employment Inventory Results
- PDS 12-2021 – 2021 Niagara Employment Inventory Status Update

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### **Appendices**

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|------------|---|
| Appendix 1 | 2022 Niagara Employment Inventory Questionnaire |
| Appendix 2 | Data Tables                                     |

# **APPENDIX 1**

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## 2022 Niagara Region Employment Inventory Questionnaire

Niagara Region is conducting an annual inventory of businesses to gather information for planning policy and economic development purposes. Information collected through this inventory will be grouped together and publicly reported to Regional Council in 2023. Information collected through this inventory will also be shared with Niagara’s local municipal governments, economic development offices and Employment Ontario agencies. A subset of the information collected will be released publically through Niagara Region’s open data program, observing your rights and freedoms outlined in the Municipal Freedom of Information and Protection of Privacy Act. For more information about this initiative please visit [Niagara's Employment Inventory](https://www.niagararegion.ca/business/employment-inventory/default.aspx) (<https://www.niagararegion.ca/business/employment-inventory/default.aspx>).

**Business Identification**

Business Name:

Business Contact Name:

Street Address:

Unit/Suite #:  Municipality:  Postal Code:

Public Business Telephone #:  Business Contact Email:

Business Website:

Business Mailing Address:   
(only if different from above)

**Business Details**

What year did this business open in Niagara?  Is this business involved in the tourism sector? Yes  No

Does this business sell goods or services outside Canada? Yes  No  Does this business import goods from outside Canada? Yes  No

Does this business have foreign or international ownership? Yes  No   
**If yes**, what is the primary country of origin?

Provide details about the specific services and/or agricultural activities associated with the business. (e.g. Full-service restaurant, Insurance agency, Machine shop, Engineering services, Roofing contractor, Vineyard, Dairy cattle farm, etc).

Is this business a non-for-profit organization? Yes  No

Is this business home-based? Yes  No

**Please return completed form to Niagara Region, Planning and Development Services at your earliest convenience.**

**E-mail:** [employmentinventory@niagararegion.ca](mailto:employmentinventory@niagararegion.ca) **Fax:** 905-641-5208 **Mail:** Employment Inventory, 1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

Is this business involved with agriculture?    Yes     No

**Business Size**

What is the **indoor** floor size (GFA) of this business?

Feet  Metres  Estimate

What is the **outdoor** operating area of this business (if applicable)?

Acres  Hectares  Estimate

**How many people are presently employed (including owners) at THIS location?**

	<b># of Full Time Employees</b> (work more than 30 hours per week)	<b># of Part Time Employees</b> (work less than 30 hours per week)
<b>PERMANENT</b>		
<b>SEASONAL</b> (between 4-6 months per year)		
<b>CONTRACT</b>		

Do employees work shift work?    Yes     No

Do employees work weekends? (Work outside the hours of 7:00 am to 6:00 pm)    Yes     No

**Work from Home**

Are there currently staff that work from home? If yes, what percentage?

Yes     No    

Have space needs changed in the past year? How does this business plan to return to the workplace?

- |  |  |
|--|--|
| <input type="checkbox"/> Yes – need less space | <input type="checkbox"/> Fully return                |
| <input type="checkbox"/> Yes – need more space | <input type="checkbox"/> Return in a hybrid scenario |
| <input type="checkbox"/> No                    | <input type="checkbox"/> Do not plan to return       |
|  | <input type="checkbox"/> Unsure                      |
|  | <input type="checkbox"/> Not Applicable              |

**Sports Businesses in Niagara**

Is this business involved in sport-related markets or activities (i.e. customers, suppliers, other)?

Yes     No

**Equity, Diversity and Inclusion**

Is the majority of this business (+50%) owned or led by a woman or women?

Yes     No     Prefer not to answer

**Please return completed form to Niagara Region, Planning and Development Services at your earliest convenience.**

**E-mail:** [employmentinventory@niagararegion.ca](mailto:employmentinventory@niagararegion.ca)    **Fax:** 905-641-5208    **Mail:** Employment Inventory, 1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

Is the majority of this business (+50%) owned or led by:

First Nations, Inuit or Métis person

Yes  No  Prefer not to answer

Person who identifies as a member of the 2SLGBTQIA+ community

Yes  No  Prefer not to answer

Person who identifies as being disabled

Yes  No  Prefer not to answer

Youth (Less than 18 years old)

Yes  No  Prefer not to answer

Person who identifies as a visible minority

Yes  No  Prefer not to answer

Please provide details below if you desire:

**Regional Service Delivery**

Does this business currently use the Region’s curbside recycling (i.e. Blue/Grey Boxes/Carts) program for the collection of recyclables? Yes  No  Unknown

**Additional Information**

Is there anything the Niagara Region can do to help support this business?

**Consent**

Do you consent to receiving email communications from the Niagara Region or your Local Area Municipality on programs, services or news related to your business, and/or participating in future studies from the Niagara Workforce Planning Board for the purpose of workforce research? Personal information will be collected, used and disclosed in accordance with applicable legislation and you will have the opportunity to opt-out of communications at any time. Any questions related to the information collected please contact: Planning and Development Services at 905-685-4225 ext. 3442

Yes  No

**Please return completed form to Niagara Region, Planning and Development Services at your earliest convenience.**

**E-mail:** [employmentinventory@niagararegion.ca](mailto:employmentinventory@niagararegion.ca) **Fax:** 905-641-5208 **Mail:** Employment Inventory, 1815 Sir Isaac Brock Way, PO Box 1042, Thorold, ON L2V 4T7

# APPENDIX 2

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## Data Tables

Table 1 – Distribution of Inventoried Businesses and Jobs by Municipality

Municipality	2016 Total Businesses	2016 Total Jobs	2017 Total Businesses	2017 Total Jobs	2018 Total Businesses	2018 Total Jobs	2019 Total Businesses	2019 Total Jobs	2022 Total Businesses	2022 Total Jobs
Fort Erie	709	6,351	719	6,867	763	8,414	775	8,301	844	5,547
Grimsby	443	4,009	455	4,750	465	5,204	479	6,682	512	4,210
Lincoln	440	4,198	543	6,650	564	6,964	571	8,108	604	6,772
Niagara Falls	2,514	22,929	2,553	32,982	2,642	32,687	2,715	33,473	2,982	24,415
NOTL	456	7,082	513	9,707	560	11,238	596	10,926	636	7,999
Pelham	271	1,743	301	2,275	318	2,677	334	3,202	372	2,865
Port Colborne	461	2,912	465	3,917	468	4,176	478	4,682	518	3,405
St.Catharines	3,657	43,045	3,771	44,254	3,966	48,130	4,051	48,726	4,396	40,107
Thorold	460	4,980	491	5,307	523	5,674	538	6,693	582	5,425
Wainfleet	43	179	58	402	60	507	61	479	72	497
Welland	1,161	11,221	1,158	12,122	1,188	14,149	1,214	14,010	1,299	9,274
West Lincoln	128	1,489	175	1,911	203	2,364	204	2,677	216	1,985
<b>Niagara Region</b>	<b>10,743</b>	<b>110,138</b>	<b>11,202</b>	<b>131,144</b>	<b>11,720</b>	<b>142,184</b>	<b>12,016</b>	<b>147,959</b>	<b>13,033</b>	<b>112,501</b>



Table 2 – Number of Businesses and Jobs by NAICS Sector

<b>NAICS Industry Sector (2-Digit)</b>	<b>Number of Jobs 2022</b>	<b>Number of Jobs Proportion of Region</b>	<b>Number of Businesses 2022</b>	<b>Number of Businesses Proportion of Region</b>
Retail trade	20,302	18.0%	2,984	22.9%
Accommodation and food services	17,802	15.8%	1,958	15.0%
Educational services	14,963	13.3%	253	1.9%
Manufacturing	11,793	10.5%	886	6.8%
Health Care and social assistance	9,803	8.7%	1,364	10.5%
Public administration	8,603	7.6%	219	1.7%
Other services (except public administration)	4,196	3.7%	1,780	13.7%
Construction	4,041	3.6%	411	3.2%
Arts, entertainment and recreation	3,534	3.1%	418	3.2%
Administrative and support, waste management and remediation services	3,161	2.8%	296	2.3%
Professional, scientific and technical services	2,928	2.6%	779	6.0%
Agriculture, forestry, fishing and hunting	2,462	2.2%	141	1.1%
Wholesale trade	2,372	2.1%	258	2.0%
Transportation and warehousing	2,092	1.9%	230	1.8%
Finance and Insurance	1,864	1.7%	486	3.7%
Real estate and rental and leasing	1,464	1.3%	328	2.5%
Information and Cultural Industries	520	0.5%	165	1.3%
Utilities	315	0.3%	33	0.3%
Undetermined	183	0.2%	26	0.2%
Mining, quarrying, and oil and gas extraction	59	0.1%	8	0.1%
Management of companies and enterprises	44	0.0%	10	0.1%
<b>Total</b>	<b>112,501</b>	<b>100%</b>	<b>13,033</b>	<b>100%</b>