
Subject: 2024 Niagara Employment Inventory Results

Report To: Planning and Economic Development Committee

Report date: Wednesday, February 5, 2025

Recommendations

1. That Report PDS 2-2025 **BE RECEIVED** for information.

Key Facts

- The purpose of this report is to highlight the key results of the data collected during the 2024 Niagara Employment Inventory (NEI).
- The NEI is an annual direct data collection exercise (inventory and questionnaire) where a team of post-secondary students inventory publicly accessible businesses across Niagara.
- The Region began conducting the NEI in 2016, other than a two year pause during the COVID-19 pandemic, the survey has been carried out consistently each year, with 2025 survey preparations underway.
- The 2024 NEI team inventoried a total of 13,335 businesses throughout Niagara and received 11,529 completed responses, which captured the location of 141,674 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 and other organizations. 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 2024 operating budget within Growth Strategy and Economic Development's base budget.

Analysis

Niagara Region is among several municipalities in Ontario that collect workplace and employment data. Since 2016, the Region has collected primary data on the types and sizes of businesses operating in Niagara.

The NEI is 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 for monitoring the Region's business and employment composition, as well as aiding decision-making and policy development. The information collected over the years has culminated into a comprehensive dataset of business information that provides the ability to research and analyze regional economic characteristics that otherwise would not be possible. The inventory is a geo-coded, spatially enabled dataset that facilitates analysis at a street-address level.

The business questionnaire was developed based on best practices from other municipalities in the Greater Toronto and Hamilton area, as well as through consultation with the following interested parties and experience gained over the years from administering the project:

- Internal Regional departments;
- Local area municipalities;
- Local economic development offices; and
- Brock University.

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 each year to accurately 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.

In 2022, two new categories were added to the questionnaire focused on (1) diversity, equity and inclusion (DEI) 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. In response to challenges in the past two years with consistent collection of the DEI data, a different approach was implemented in 2024. The questions were asked in a separate survey following the end of the data collection period for NEI.

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.

Results

Table 1 in Appendix 1 illustrates the proportion of complete and partially complete inventory records from 2016-2019, and 2022-2024. 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 2%) of businesses, who when contacted, declined to participate.

In 2024, a completion rate of 86% was achieved. The 2024 completion rate is strong with a 6% increase since 2023. A steady increase in the completion rate year-over-year can be attributed to greater familiarity with the survey and project team, a streamlined data entry methodology, and joint communication outreach conducted by our local Chambers of Commerce and other interest groups.

The NEI team inventoried 13,335 businesses and received 11,529 completed questionnaires in 2024. Compared to 2023 there is an increase of 475 businesses inventoried which captured the physical location of 141,674 full and part time jobs. There was a decrease of 5,162 part time jobs; however, an increase of 706 full time jobs were captured in the inventory.

Job Type Results

Table 2 in Appendix 1 illustrates the number of businesses inventoried and jobs captured within complete questionnaires in the 2024 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 2024 were: retail trade (22.0%), accommodation and food services (15.0%) and other

services (except public administration) ¹(13.3%). When combined, these sectors make up 50% of all the businesses captured in the inventory.

Based on the number of jobs captured in complete questionnaires, the top three sectors observed in 2024 were: retail trade (16.3%), accommodation and food services (15.1%), and health care and social assistance (13.1%). Together, these sectors make up 44% of the total jobs captured in complete questionnaires.

Business Closures and Openings

In 2024, approximately 810 businesses inventoried were 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 other services (except public administration).

Over the same period, approximately 629 new businesses were identified and added to the inventory in 2024; 158 of those businesses are net new in 2024. The top three sectors that new businesses were observed in are: retail trade; accommodation and food services; and other services (except public administration).

Table 3 in Appendix 1 illustrates business closures and openings from 2022-2024, highlighting the changing economic landscape in Niagara Region.

Distribution of Inventoried Businesses and Number of Jobs by Municipality

Table 4 in Appendix 1 illustrates the municipal breakdown of the number of businesses and jobs reported over the last six inventory periods. 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.

Table 5 in Appendix 1 illustrates the completion rate by municipality. The completion rate includes businesses that provided responses to the inventory questionnaire from beginning to end (“complete questionnaire”), and businesses that were confirmed to be permanently closed or vacant. The top three municipalities with the highest completion rate in 2024 were: Thorold (90.0%), West Lincoln (88.6%), and Welland (88.5%).

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

Work from Home

In total, 1,155 businesses reported having staff working from home, representing approximately 9,127 employees. This is an increase from approximately 1,021 businesses and 7,023 employees reported in 2023. The majority of employees working from home were in the professional, scientific, and technical services (29.6%), manufacturing (14.1%), and education (13.4%).

Diversity, Equity and Inclusion

2024 marks the third year Niagara Region has asked diversity, equity and inclusion questions to understand the demographic characteristics of the leadership teams in the Niagara business community.

Table 6 in Appendix 1 provides the responses to the questions in the DEI section. Businesses were asked whether the majority of the business (+50%) are owned or led by:

- Person who identifies as a woman
- Person who identifies as a member of the 2SLGBTQIA+² community
- Person who identifies as being disabled
- First Nations, Inuit or Métis person
- Person who identifies as a visible minority
- Youth (Less than 18 years old)
- Person who is a new immigrant (in Canada less than 5 years)

Women led businesses (37%) has consistently been identified in the top demographics followed by visible minority (9.4%) and 2SLGBTQIA+ (3.7%).

Respondents were given the opportunity to complete the DEI section online for a period of 3 weeks if they consented to receiving additional communications from Niagara Region. In total, 1,120 businesses responded to the questions in the DEI section. The top three sectors that completed the DEI section were retail trade (19.0%), health care and social assistance (16.6%), and accommodation and food services (12.2%).

Table 7 in Appendix 1 shows the municipal breakdown of businesses that consented to the DEI section and businesses that completed it. All municipalities across the Region

² Two spirit, lesbian, gay, bisexual, transgendered, queer, questioning, intersex, asexual, and all other sexual orientations and genders.

achieved a consistent completion rate averaging 20.9% overall. The top three municipalities with the highest DEI completion rate were West Lincoln (27.5%), Port Colborne (26.4%), and Fort Erie (25.2%).

Staff in the DEI and Indigenous Relations team are reviewing the responses to develop strategies to continue 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 providing high level data. Whereas the NEI is updated on a yearly basis to capture the current locational information, excluding the two-year data gap prompted by the COVID-19 pandemic.

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 since 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. Projects that the NEI data has been used for include:

- South Niagara Hospital Project Business Directory;
- Niagara Official Plan Land Needs Assessment;
- Niagara Region Waste Collection Contract Review; and,

- Brock University Active Economy and Sport Tourism 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.

The NEI data along with the report will be circulated by the NEI team to Local Area Municipalities, Local Economic Development Offices, The Niagara Chambers of Commerce, Brock University and Niagara College.

Building Relationships

The NEI also provides key opportunities for the Region to directly connect with local businesses to further develop partnerships, foster an environment for innovation and development within the Niagara business community, and the ability to listen and address any comments or concerns. Staff turnover and changing business operations can become an obstacle when trying to engage businesses, largely because the contact information in the NEI database became outdated. Following the two year reporting gap, the project team continues to focus on building relationships with the business community. 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.

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 8 in Appendix 1 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 top three themes for 2024 are business exposure (20.0%), incentives/grants/contracts (13.1%), and taxes and utilities (11.1%). The raw comments are shared with applicable internal departments, and with local municipal partners.

Open Data

Each year, a subset of the NEI results is 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 could opt not to receive and share this report. However, as the results of the NEI contribute to projects and initiatives which are actions of Council's Strategic Priorities, this option is not recommended.

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 Prosperous Region, Equitable Region, and Effective Region. 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 local 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 1-2017 – Niagara Region Employment Inventory Preliminary Results](https://www.niagararegion.ca/council/Council%20Documents/2017/council-agenda-feb-09-2017.pdf) (https://www.niagararegion.ca/council/Council%20Documents/2017/council-agenda-feb-09-2017.pdf)
- [PDS 5-2018 – Niagara Region 2017 Employment Inventory Results](https://www.niagararegion.ca/council/Council%20Documents/2018/council-agenda-feb-08-2018.pdf) (https://www.niagararegion.ca/council/Council%20Documents/2018/council-agenda-feb-08-2018.pdf)
- [PDS 6-2019 – Niagara Region 2018 Employment Inventory Results](https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=2512) (https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=2512)
- [PDS 5-2020 – Niagara Region 2019 Employment Inventory Results](https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=8594) (https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=8594)

- [PDS 12-2021 – 2021 Niagara Employment Inventory Status Update](https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=15406) (https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=15406)
- [PDS 6–2023 – 2022 Niagara Employment Inventory Results](https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=30515) (https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=30515)
- [PDS 13-2024 – 2023 Niagara Employment Inventory Results](https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=36722) (https://pub-niagararegion.escribemeetings.com/filestream.ashx?DocumentId=36722)

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Appendices

Appendix 1 Data Tables

APPENDIX 1

Data Tables

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%
2022	75%	24%	<1%
2023	80%	19%	<1%
2024	86%	13%	<2%

Table 2 – Number of Businesses and Jobs by NAICS Sector

NAICS Industry Sector (2-Digit)	Number of Jobs 2024	Percentage of Jobs in Region	Number of Businesses 2024	Percentage of Businesses in Region
Accommodation and food services	21,445	15.1%	1990	15.0%
Retail Trade	23,043	16.3%	2928	22.0%
Health Care and Social Assistance	18,571	13.1%	1396	10.5%
Manufacturing	14,940	10.5%	886	6.6%
Educational Services	15,681	11.1%	262	2.0%
Public Administration	7,590	5.4%	242	1.8%
Other Services (except public administration)	6,902	4.9%	1785	13.3%
Construction	4,840	3.4%	448	3.3%
Professional, Scientific, Technical Services	3,969	2.8%	882	6.6%
Arts, Entertainment and Recreation	4,831	3.4%	466	3.5%
Administrative and Supportive, Waste Management and Remediation Services	3,708	2.6%	322	2.4%
Agriculture, Forestry, Fishing and Hunting	2,907	2.0%	172	1.3%
Wholesale Trade	3,678	2.6%	291	2.2%
Finance and Insurance	2,520	1.8%	484	3.6%
Transportation and Warehousing	3,269	2.3%	232	1.7%
Real Estate, Rental and Leasing	2,372	1.7%	347	2.6%
Information and Cultural Industries	745	0.5%	145	1.1%
Utilities	498	0.4%	40	0.3%
Mining, Quarrying, and Oil and Gas Extraction	122	0.1%	8	0.0%
Management of Companies and Enterprises	43	0.0%	9	0.0%
Total	141,674	100%	13,335	100%

Table 3 – Business Closures and Openings

Year	Permanently Closed Businesses	New Businesses Added to Database	New Businesses Opened Each Year
2023	797	1,269	145
2024	810	629	158

Table 4 – Distribution of Inventoried Businesses and Jobs by Municipality

Municipality	2017		2018		2019		2022		2023		2024	
	Total Businesses	Total Jobs	Total Businesses	Total Jobs	Total Businesses	Total Jobs	Total Businesses	Total Jobs	Total Businesses	Total Jobs	Total Businesses	Total Jobs
Fort Erie	719	6,867	763	8,414	775	8,301	844	5,547	786	5,689	825	6,437
Grimsby	455	4,750	465	5,204	479	6,682	512	4,210	526	6,509	573	4,882
Lincoln	543	6,650	564	6,964	571	8,108	604	6,772	627	8,249	647	7,737
Niagara Falls	2,553	32,982	2,642	32,687	2,715	33,473	2,982	24,415	2,973	33,828	3044	29,304
NOTL	513	9,707	560	11,238	596	10,926	636	7,999	669	10,072	710	10,117
Pelham	301	2,275	318	2,677	334	3,202	372	2,865	393	3,724	417	3,462
Port Colborne	465	3,917	468	4,176	478	4,682	518	3,405	484	4,076	506	3,895
St. Catharines	3,771	44,254	3,966	48,130	4,051	48,726	4,396	40,107	4,292	46,594	4404	46,466
Thorold	491	5,307	523	5,674	538	6,693	582	5,425	593	7,337	632	8,352
Wainfleet	58	402	60	507	61	479	72	497	83	576	82	509
Welland	1,158	12,122	1,188	14,149	1,214	14,010	1,299	9,274	1,212	16,519	1266	17,738
West Lincoln	175	1,911	203	2,364	204	2,677	216	1,985	222	2,955	229	2,775
Niagara Region	11,202	131,144	11,720	142,184	12,016	147,959	13,033	112,501	12,860	146,128	13,335	141,674

Table 5 – Municipality Completion Rate

Municipality	Completion Rate	
	Complete Businesses	Completion Rate Percentage
Fort Erie	702	85.1%
Grimsby	472	82.4%
Lincoln	555	85.8%
Niagara Falls	2,628	86.3%
NOTL	591	83.1%
Pelham	361	86.6%
Port Colborne	432	85.4%
St. Catharines	3,826	86.9%
Thorold	569	90.0%
Wainfleet	67	81.7%
Welland	1,120	88.5%
West Lincoln	203	88.6%
Niagara Region	11,526	86.4%

Table 6 – Diversity Equity and Inclusion Responses

Response	Women Led	2SLGBTQQA+ Led	Disability Led	First Nations, Inuit, Metis Led	Visible Minority Led	Youth Led	New Immigrant Led
Yes	414	34	21	16	105	2	22
No	476	834	854	890	755	899	875
Decline	230	252	245	214	260	219	223

Table 7 – Municipality DEI Completion Rate

Municipality	Businesses that consented to emails	DEI Complete Surveys	DEI Completion Rate
Fort Erie	301	76	25.2%
Grimsby	250	59	23.6%
Lincoln	291	66	22.7%
Niagara Falls	1141	221	19.4%
NOTL	294	61	20.7%
Pelham	209	41	19.6%
Port Colborne	193	51	26.4%
St. Catharines	1776	341	19.2%
Thorold	286	68	23.8%
Wainfleet	37	7	18.9%
Welland	462	99	21.4%
West Lincoln	109	30	27.5%
Total	5349	1120	20.9%

Table 8 – “Is there anything Niagara Region could do to support your business?”

Response Themes	Responses Received 2024	Proportion 2023	Proportion 2024
Business Exposure	575	14.9%	20.0%
Incentives/Grants/Contracts	376	11.7%	13.1%
Taxes and Utilities	320	11.3%	11.1%
Infrastructure/Traffic Issues/Construction	311	12.4%	10.8%
Social Support Programs/Programs	198	7.0%	6.9%
Parking Issues	151	4.9%	5.3%
Governance	124	2.3%	4.3%
Waste Management	123	4.7%	4.3%
Development Process/Zoning/Land Use	124	4.1%	4.3%
Health and Safety	119	7.0%	4.1%
Skills and Labour Force	116	8.5%	4.0%
Awareness and Education	89	4.7%	3.1%
Transit	75	2.9%	2.6%
Beautification	72	2.2%	2.5%
Other	68	0.2%	2.4%
Development Charges	18	0.6%	0.6%
Impact of COVID-19	11	0.6%	0.4%
Total	2,870	100%	100%