



2021-22 **ANNUAL** **LABOUR** **MARKET** **REPORT**

CONTENTS

Letter from the CEO.....	3
About Us.....	4
Board of Directors and Staff.....	5
Executive Summary.....	6
Section 1: Who is Living and Working in Niagara?.....	8
Section 2: In What Jobs do Niagara Residents Typically Work?.....	15
Section 3: In What Industries do Niagara Residents Work?.....	22
Section 4: Measures of Available Labour Supply.....	29
Section 5: Employer Profile and Employer Insights.....	33
Section 6: Concluding Remarks and Next Steps.....	44
Section 7: Action Plan.....	49



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The views expressed in this document do not necessarily
reflect those of the Government of Ontario.

LETTER FROM THE CEO

I am pleased to present you with Niagara Workforce Planning Board's annual labour market report; this report reflects work conducted throughout the second year of employment disruption and change amid the COVID-19 pandemic.

Our work this year has demonstrated the need for flexibility and a future-focused vision as we plan and engage community partners in workforce development needs. We are grateful to the many individuals, businesses, and community partners who have openly shared their challenges and opportunities. There is no doubt that the impacts of the COVID-19 pandemic continue to amplify challenges within our local labour market. While we share many of these with communities across Ontario and Canada, the specific nature of our location, economy, and workforce demographic creates unique circumstances that require creative solutions.

Our work this year has provided valuable insight into local labour market challenges under three overarching themes:

- The need to focus on the challenges and opportunities of different segments of the labour market, such as women and youth, as well as the different needs of employers hiring for specific occupations;
- The contribution that immigration is making to the talent pool available in the local labour market;
- The need for a more comprehensive examination of the “new world of work”; for example, the shift to remote work, the disconnect between labour demand and supply within a context of labour shortages, and the ways in which well-being is a major focus of work/life integration.

At a time when employment and training needs for both job seekers and employers has changed, the need for data that can inform decision makers and stakeholders has never been more essential. This report continues to offer the context of where Niagara was before the pandemic and begins the journey of documenting the impacts of COVID-19 on the labour market in the longer term. It is best seen as part of an ongoing conversation that NWPB continues to have with partners within our community: employers, governments, colleagues within the employment services and literacy and basic skills networks, and directly with the individuals that make up Niagara's workforce.

I am grateful for the support of staff at the Ontario Ministry of Labour, Training and Skills Development in helping to guide our work, and to Minister Monte McNaughton for his leadership in navigating the changes we are witnessing in the Ontario labour market.

I encourage readers of this report to explore the resources available on our website <https://nwpb.ca> as we move forward into pandemic recovery. Our team at NWPB is committed to offering relevant employment-related data and insights to support the Niagara community in our recovery. We thank you for your ongoing support and look forward to continuing our work with you.

Vivian Kinnaird, CEO
Niagara Workforce Planning Board

ABOUT US

Niagara Workforce Planning Board (NWPB) is one of 26 regional workforce planning boards in Ontario making up the Local Boards Network, and one of 9 boards making up the Workforce Planning West Network.

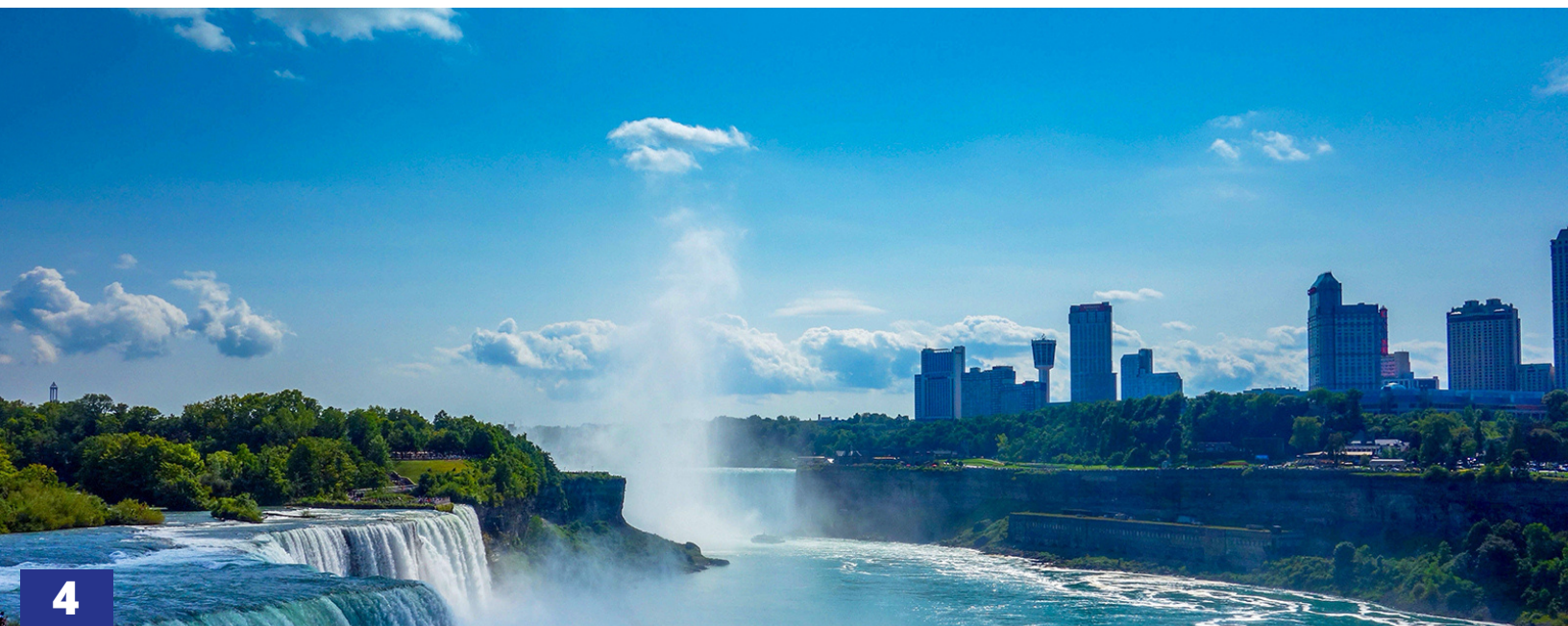
NWPB is Niagara's trusted community partner, providing data and insight in support of a diverse and talented workforce that contributes to a prosperous community. Our work prepares the Niagara community for the workforce challenges and opportunities of today and the future.

Our Vision: A diverse and talented regional workforce contributing to a prosperous community.

Our Mission: We support our local community organizations by bringing objective, accurate, and future-focused workforce research to enhance planning and decision making; and working in partnership across Niagara to address workforce development challenges and find solutions.

Our Values

- We Listen
- We are collaborative
- We do the right thing
- We are community focused
- We are inclusive
- We are future aware



BOARD OF DIRECTORS

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EXECUTIVE SUMMARY

Recognizing that population trends are an essential component of measuring local labour supply, this report finds that between 2016 and 2020, Niagara's population increased by 4.9%. As of 2020, Niagara was home to an estimated 481,727 people. Five-year population migration data shows that between 2014-2019, Niagara gained 22,670 new residents. Niagara's 18-24-year-old net-migration increased by 429.1% between 2015-16 and 2018-19, while net-migration among people 65 and older declined by 43.7% during the same period.

As of June 2021, there were approximately 13,418 businesses with employees (including not-for-profit businesses and registered charities) operating in the Niagara region. Approximately 73% of these businesses employed fewer than 10 employees. Niagara also was home to 28,910 zero-employee businesses (i.e., self-employed individuals).

In the Spring of 2021, the Niagara Economic Rapid Response Team conducted the third Business Impact Survey. Results suggest that 20.4% of respondents were vulnerable to closure, and 6.7% were at risk of imminent closure due to COVID-19. However, tourism-oriented employer insights showed that 35.6% were vulnerable to closure and 9.2% were at risk of imminent closure.

Alongside these trends on business stability, many employers did indicate that they planned on hiring throughout 2021, with 212 of 786 employers anticipating hiring for full-time positions, and 203 anticipating hiring for part-time positions. These trends were reflected in local job demand data which showed fairly consistent demand for work in Niagara.

Data from Niagara's Employment Services providers offer insights on the experiences and skills that are found among their job-seeking clients. Employment Services clients offer recent experience in the following industries: accommodations and food services; administrative support services; manufacturing, retail trade, and construction. The educational attainment for employment services clients show that the vast majority have completed some form of post-secondary education. These trends are in line with what we see at the provincial level. It also is important to note that while Ontario has one of the largest proportions of individuals with post-secondary education across Canada[1], national-level job demand data show that – of job posts classified within an occupation – just over 46% require either no formal education/on-the-job training or a high school diploma/occupation-specific training[2].

[1] Statistics Canada, Education Highlight Tables, 2016 Census. Retrieved [here](#)

[2] Labour Market Information Council, Canadian Online Job Posting Dashboard available [here](#). Calculations by NWPB.

EXECUTIVE SUMMARY

With respect to the local workforce, 2020 represented a year of considerable employment disruption. Annual data estimate that 13,700 people lost employment between 2019 and 2020. COVID-19's employment impacts also were unequal across the labour force, and women shouldered the larger share of employment disruption. Monthly employment trends demonstrate that men briefly saw their level of employment rise above pre-pandemic levels in the summer of 2020, employment for women surpassed pre-pandemic employment in September of 2021.

In addition to more details on the above high-level insights, this report outlines local employment trends across occupations and industries. For example, pre-pandemic employment data shows that some of the most common jobs in Niagara are concentrated in a number of occupations including retail salespersons, food counter attendants, cashiers, nurse aides, light duty cleaners, and cooks. These jobs were at a high risk of disruption throughout the pandemic, and many are classified within sales and service occupations. Annual employment data show that 2020 saw 10,800 fewer people working in sales and services than in 2019 (from 65,500 to 54,700 people employed, a 16.5% decline).

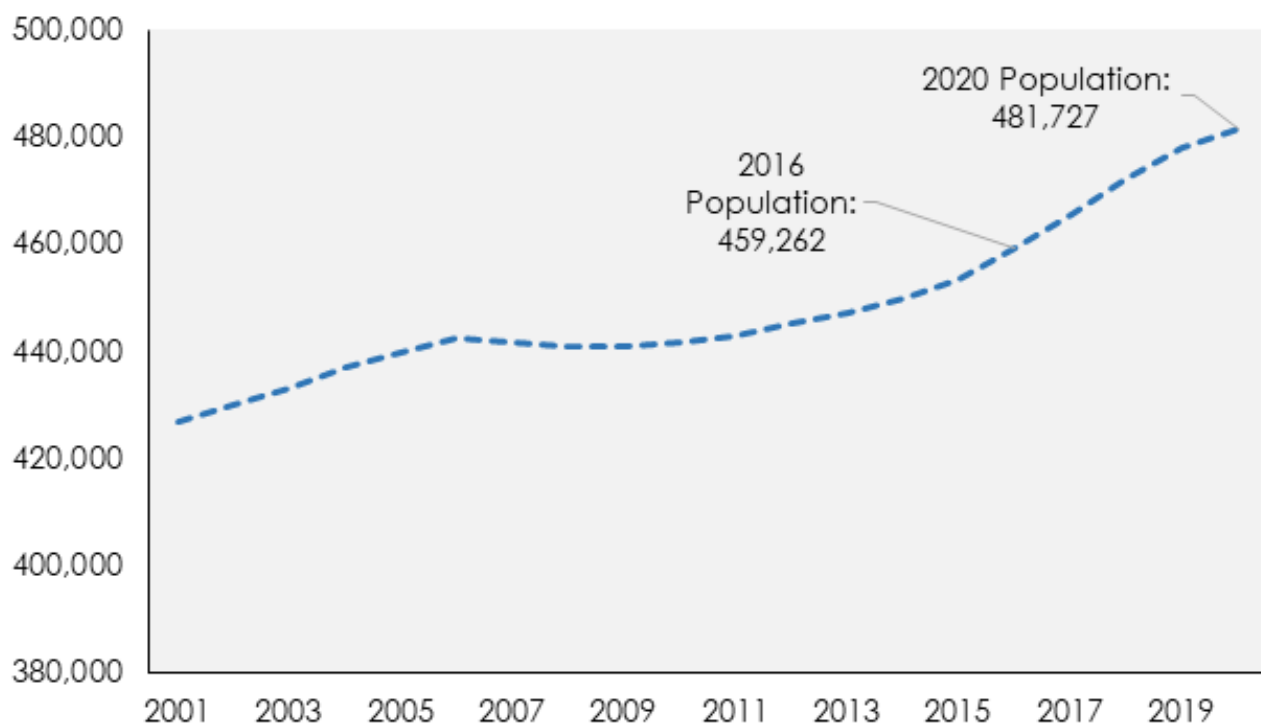
SECTION 1

WHO IS LIVING AND WORKING IN NIAGARA?

POPULATION AND MIGRATION TRENDS

Reviewing local population patterns provides a fundamental understanding of Niagara's maximum potential labour force. Niagara has experienced a prolonged period of population growth since 2009, as seen in Figure 1-1. The latest 2020 population estimates from Statistics Canada report that there were approximately 481,727 people living in Niagara. This figure represents a 4.9% population increase since 2016. This is less than Ontario's population increase of 6.3% during the same period.

Figure 1-1: Current and Historical Population Estimates for the Niagara Region[3]



When we compare changes in population, Niagara's year-over-year population growth rate slowed to a 0.7% increase between 2019-20. Ontario's trend was similar, with growth slowing to 1.3% in 2019-20. It is likely that this trend is being influenced by national-level migration/immigration policies emerging out of the COVID-19 crisis.

WHO IS LIVING AND WORKING IN NIAGARA?

At the time of this report, updated migration data for 2020 were not yet available. Table 1-2 shows Niagara's most recent net-migration trends (i.e., the difference between people who moved out of the region and who moved into the region in a given year), broken down by age group.

Table 1-2: Recent (2014-2019) Net-Migration into the Niagara Region[4]

Year	Net-Migration Age Cohorts					Total
	Ages 0-17	Ages 18-24	Ages 25-44	Ages 45-64	Ages 65+	
2014-2015	809	-54	670	1,416	665	3,506
2015-2016	1,013	165	773	1,838	746	4,535
2016-2017	1,024	212	871	1,614	635	4,356
2017-2018	934	431	1,294	1,469	555	4,683
2018-2019	1,060	873	1,847	1,390	420	5,590
Total	4,840	1,627	5,455	7,727	3,021	22,670

Niagara has seen steady growth in net-migration over the last 5 years. Migrants aged 45-64 years represent the largest segment of Niagara's migrants at 34.1% of net-migration. Niagara's 18-24 year old net-migration increased by 429.1% between 2015-16 and 2018-19, while net-migration among people 65 and older declined by 43.7% during the same period. These data call into question the popular narrative of Niagara as a purely retirement destination for migrants.

While a detailed analysis of migration patterns is beyond the scope of this report, these data do demonstrate how there is no single simple narrative of population change via migration in Niagara. Niagara's trend of youth leaving the region has reversed in recent years. The number of retirement-age people moving into the region is in decline, and the number of net-migrants of early-to-mid career age has almost tripled between 2014-15 and 2018-19.

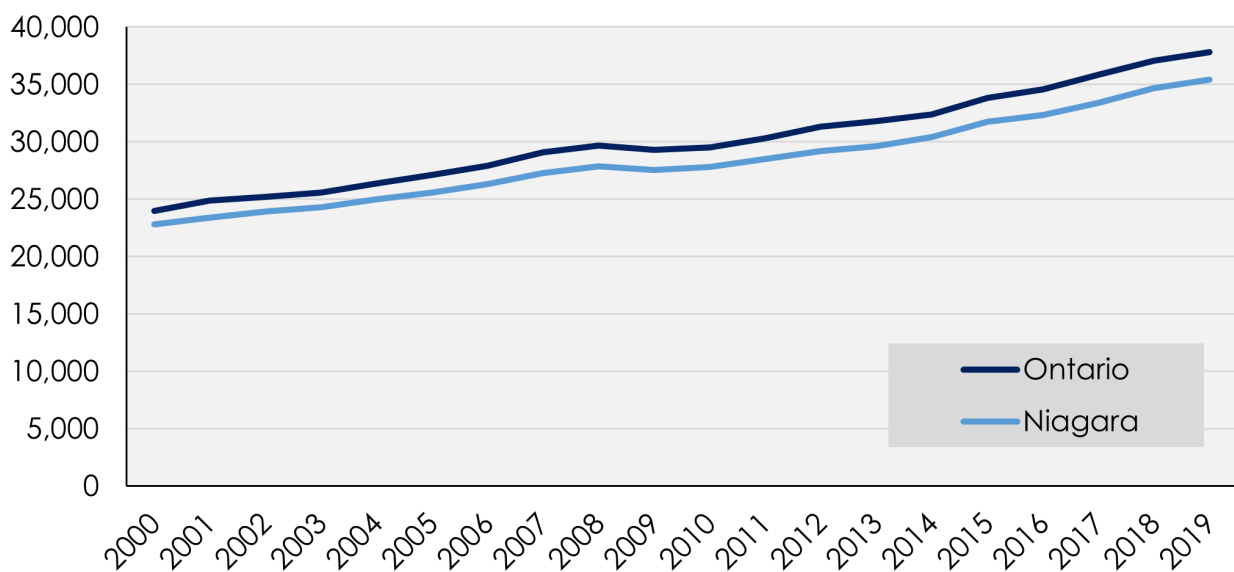
[4] Statistics Canada, Taxfiler Database, Population Migration, Niagara Census Division Note: these data are inclusive of all people moving into Niagara, regardless of immigration status.

WHO IS LIVING AND WORKING IN NIAGARA?

INCOME TRENDS

Here we see income trends in Niagara. Figure 1-3 offers the median total income for individuals living in Niagara and Ontario. Statistics Canada reports these data in the Canadian dollar at current prices. Below we see the difference between incomes in Ontario and Niagara have widened over time.

Figure 1-3: Median Total Income for Taxfilers, St. Catharines-Niagara CMA & Ontario, 2000-19[5]



TREND TO CONSIDER

We do not yet know how COVID-19 impacted migration throughout 2020, and whether any changes are the start of a long-term trend or a temporary anomaly. Recent changes in Niagara's housing market – whose typically less-expensive nature stood as an asset to workforce attraction and retention efforts – may also change our current migration trend.

For example, in March 2020, Niagara's average home price was \$452,400; in March 2021 this price increased by 37.2% to \$620,700. In Ontario, we saw an increase from \$685,430 to \$890,095 (29.9% increase) throughout the same period[6].

This annual increase in local housing cost is larger than Niagara's five-year increase in individual income. This imbalance may lead to unforeseen consequences in local migration and workforce attraction and retention.

[5] Statistics Canada. Table 11-10-0008-01 Tax filers and dependants with income by total income, sex and age

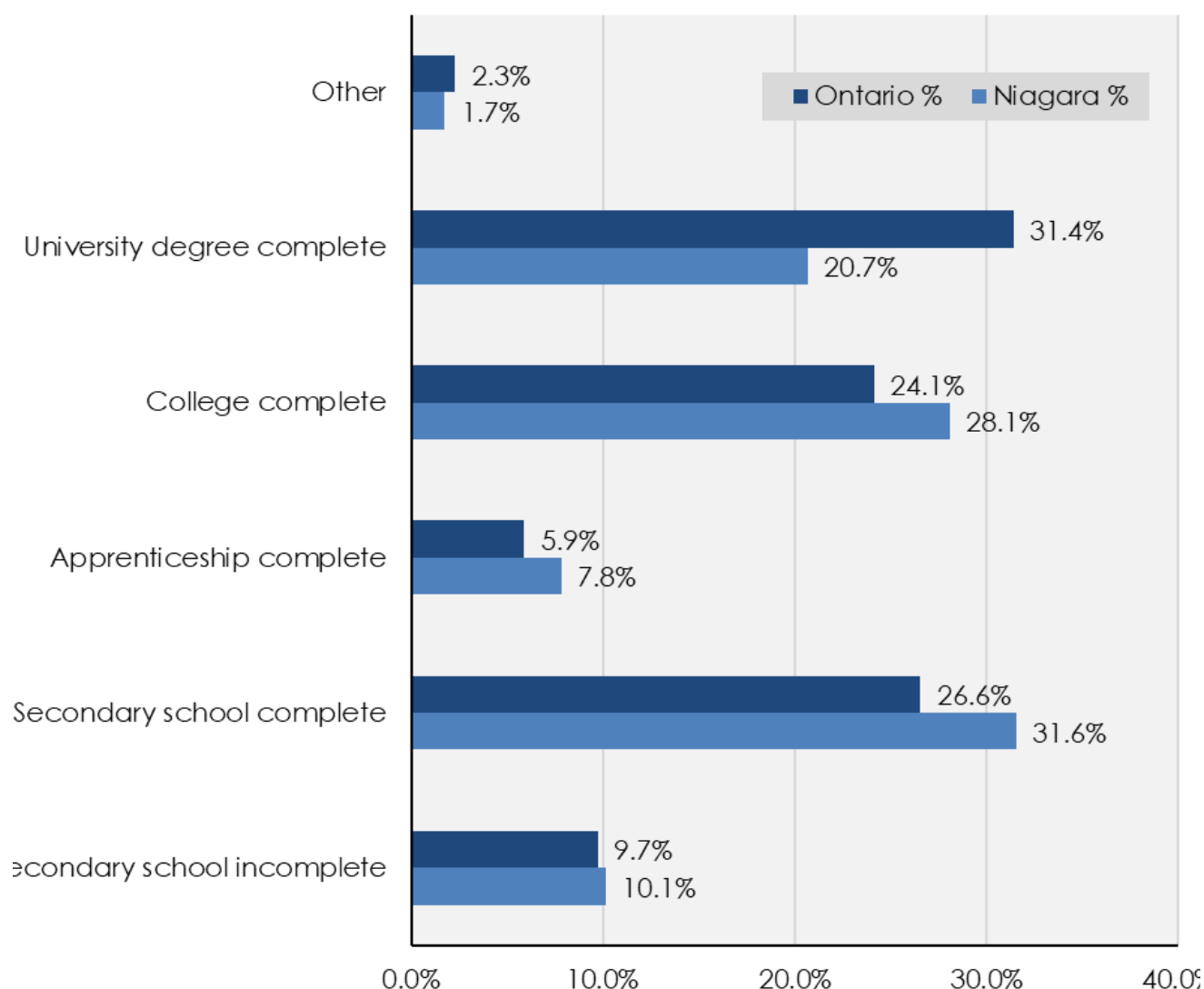
[6] Source: Publicly accessible data from the Canadian Real Estate Association's national price map

WHO IS LIVING AND WORKING IN NIAGARA?

NIAGARA'S WORKFORCE AND EMPLOYMENT TRENDS

According to the 2016 census, about 58.3% of Niagara's labour force held some form of post-secondary education – approximately 28% reported having a college diploma (see Figure 1-4).

Figure 1-4: Highest level of educational attainment, Niagara's Labour Force, 2016 Census[7]



WHO IS LIVING AND WORKING IN NIAGARA?

Table 1-5 outlines age and gender characteristics for Niagara's 2020 labour force.

Table 1-5: Age and Gender Cohorts, 2020, St. Catharines-Niagara CMA[8]

Age Cohort	Total	Men	Women
15 to 24 years	29,900	16,500	13,500
25 to 54 years	126,600	67,100	59,500
55 to 64 years	44,100	23,200	21,000
65 years and over	10,600	6,500	4,100
15 years and over	211,200	113,200	98,000

With respect to the local workforce, 2020 represented a year of considerable employment disruption. Annual data estimate that 13,700 people lost employment between 2019 and 2020. About 81.7% of these individuals were working in a full-time capacity. Table 1-6 provides an overview of Niagara's key annual employment indicators.

Table 1-6: St. Catharines-Niagara CMA, Key Employment Indicators[9]

Indicator	2016	2017	2018	2019	2020
Labour force	220,900	215,200	220,400	216,900	211,200
Employment	204,900	200,800	205,700	204,300	190,600
<i>Full-time employment</i>	159,100	155,500	156,300	158,400	147,200
<i>Part-time employment</i>	45,800	45,300	49,400	45,900	43,400
Unemployment	16,000	14,400	14,700	12,600	20,600
Not in labour force	129,100	140,500	141,100	150,400	160,200
Unemployment rate	7.2%	6.7%	6.7%	5.8%	9.8%
Participation rate	63.1%	60.5%	61.0%	59.1%	56.9%
Employment rate	58.5%	56.5%	56.9%	55.6%	51.3%

WHO IS LIVING AND WORKING IN NIAGARA?

It is also essential to note that COVID-19's employment impacts were unequal across the labour force, and women shouldered the larger share of employment disruption. Table 1-7 demonstrates the way in which the pandemic widened gender gaps that already existed in the local workforce.

Table 1-7: St. Catharines-Niagara CMA, Key Employment Indicators by Gender [10]

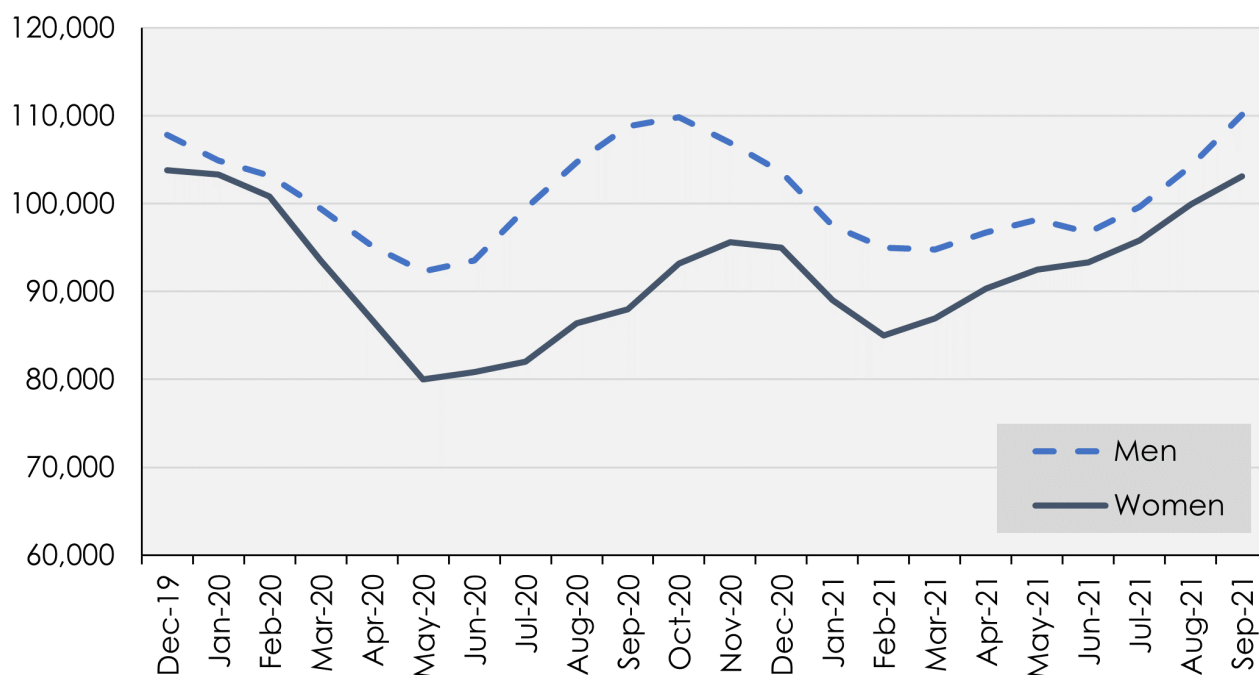
Labour force characteristics	Gender	2019	2020	2019-20 Change
Labour force	Men	113,700	113,200	-500
	Women	103,200	98,000	-5,200
Employment	Men	106,100	101,300	-4,800
	Women	98,200	89,300	-8,900
Unemployment	Men	7,600	11,900	4,300
	Women	4,900	8,700	3,800
Not in labour force	Men	67,200	72,000	4,800
	Women	83,200	88,200	5,000
Unemployment rate	Men	6.70%	10.50%	3.8%
	Women	4.70%	8.90%	4.2%
Participation rate	Men	62.90%	61.10%	-1.8%
	Women	55.40%	52.60%	-2.8%
Employment rate	Men	58.70%	54.70%	-4.0%
	Women	52.70%	48.00%	-4.7%

[10] Statistics Canada, Labour Force Survey, St. Catharines-Niagara Census Metropolitan Area, Table 14-10-0385-01

WHO IS LIVING AND WORKING IN NIAGARA?

One of the challenges of the last year has been the way in which the first three waves of COVID-19 created acute employment disruptions. Monthly data seen in Figure 1-8 show the peaks and valleys that prolonged periods of lockdown created for the local workforce. When we compare these trends to pre-pandemic employment counts (i.e., February 2020), the data demonstrate that men briefly saw their level of employment rise above pre-pandemic levels in the summer of 2020, employment for women surpassed pre-pandemic employment in September of 2021. For a detailed analysis of these local trends, please consult NWPB's [Eye on Employment](#).

Figure 1-8: Monthly Employment for Men and Women, St. Catharines-Niagara CMA, 2019-2021[11]



TREND TO CONSIDER

Given these unequal impacts, we have an in-depth examination of gendered employment impacts in our 2020 report: [Women, Men, and Work in Niagara](#).

Youth also experienced large employment impacts due to the pandemic. We have a number of resources related to youth employment available on our [website](#).

SECTION 2

IN WHAT JOBS DO NIAGARA RESIDENTS WORK?

This section looks at local jobs from an occupational perspective. In other words, it provides insight on the type of work that individuals are engaged in. It outlines employment trends, job counts, and local job demand.

EMPLOYMENT COUNTS

Data from Statistics Canada's Labour Force Survey allow for an examination of the occupations where Niagara residents find employment. These data are employment counts; any changes do not naturally translate to gains or losses in jobs. Table 2-1 provides 5-year changes in employment between 2016 and 2020.

Table 2-1: Occupation of Employment, 5-year change, St. Catharines-Niagara CMA[12]

Occupation	2016	2020	2016-20 Change	2016-20 % Change
Management	16,900	15,500	-1,400	-8.3%
Business, finance & administration	27,200	29,500	2,300	8.5%
Natural & applied sciences & related work	9,100	8,700	-400	-4.4%
Health	17,400	15,200	-2,200	-12.6%
Education, law & social, community & government	21,600	19,200	-2,400	-11.1%
Art, culture, recreation & sport	5,500	4,000	-1,500	-27.3%
Sales & service	64,000	54,700	-9,300	-14.5%
Trades, transport & equipment operators & related work	30,500	27,500	-3,000	-9.8%
Natural resources, agriculture & related production work	4,500	5,700	1,200	26.7%
Manufacturing & utilities	8,200	10,800	2,600	31.7%
Total employed	204,900	190,600	-14,300	-7.0%

IN WHAT JOBS DO NIAGARA RESIDENTS WORK?

Table 2-2 outlines annual employment changes between 2019 and 2020. Among the 13,700 people who lost employment, 78.8% were employed in sales and services occupations.

Table 2-2: Occupation of Employment, Annual change, St. Catharines-Niagara CMA[13]

Occupation	2019	2020	2019-20 Change	2019-20 % Change
Management	16,000	15,500	-500	-3.1%
Business, finance & administration	25,300	29,500	4,200	16.6%
Natural & applied sciences & related work	7,700	8,700	1,000	13.0%
Health	17,100	15,200	-1,900	-11.1%
Education, law & social, community & government services	18,200	19,200	1,000	5.5%
Art, culture, recreation & sport	6,500	4,000	-2,500	-38.5%
Sales & service	65,500	54,700	-10,800	-16.5%
Trades, transport & equipment operators & related work	32,500	27,500	-5,000	-15.4%
Natural resources, agriculture & related production work	5,200	5,700	500	9.6%
Manufacturing & utilities	10,300	10,800	500	4.9%
Total employed	204,300	190,600	-13,700	-6.7%

IN WHAT JOBS DO NIAGARA RESIDENTS WORK?

JOB COUNTS

Table 2-3 outlines job counts in 2016 and 2020 for occupations in Niagara. It also provides the location quotients (LQ) for each occupation. LQs allow us to compare the concentration or distribution of jobs in Niagara to Ontario. LQs greater than 1 indicate the concentration is higher in Niagara than what we would expect based on provincial concentrations. LQs lower than 1 indicate the concentration in Niagara is lower than in Ontario.

Table 2-3: Occupation Job Counts and Provincial Location Quotients, 5-year change, Niagara^[14]

Occupation	2016		2020		2016-2020		
	Jobs	LQ	Jobs	LQ	Job change	% job change	LQ Change
Management	11,837	0.93	10,378	0.88	-1,460	-12.3%	-0.06
Business, finance &	26,178	0.82	23,694	0.8	-2,485	-9.5%	-0.02
Natural & applied sciences & related work	8,382	0.58	8,441	0.57	60	0.7%	-0.02
Health	11,769	1.05	11,874	1.09	105	0.9%	0.04
Education, law & social, community & government services	19,262	0.92	18,287	0.95	-975	-5.1%	0.04
Art, culture, recreation & sport	3,493	0.85	3,226	0.91	-267	-7.6%	0.06
Sales & service	57,849	1.27	52,290	1.28	-5,558	-9.6%	0
Trades, transport & equipment operators & related work	23,843	1.07	22,391	1.09	-1,452	-6.1%	0.02
Natural resources, agriculture & related production work	4,208	1.87	4,133	2.01	-75	-1.8%	0.14
Manufacturing & utilities	9,945	0.86	8,734	0.87	-1,211	-12.2%	0
Unclassified	3,191	1.00	2,949	1.05	-241	-7.6%	0.05
Total jobs	179,956		166,397		-13,560	-7.5%	

[14] EMSI Analyst, 2021.1 run, employees. Access to EMSI Analyst is supported through the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA). The views expressed in this report do not necessarily reflect those of OMAFRA.

IN WHAT JOBS DO NIAGARA RESIDENTS WORK?

Table 2-4 outlines annual changes in job counts between 2019 and 2020 for Niagara. We see that each occupation reported fewer jobs in 2020 than in 2019 – likely reflect anomalies due to the pandemic.

We saw the largest impact in sales and service occupations. This trend also reflects the employment changes outlined in Table 2-2.

Table 2-4: Table 2-4: Occupation Job Counts, Annual change, Niagara[15]

Occupation	2019	2020	2019-20 Change	2019-20 % Change
Management	11,709	10,378	-1,331	-11.4%
Business, finance & administration	26,642	23,694	-2,949	-11.1%
Natural & applied sciences & related work	9,389	8,441	-948	-10.1%
Health	13,109	11,874	-1,235	-9.4%
Education, law & social, community & government services	20,274	18,287	-1,987	-9.8%
Art, culture, recreation & sport	3,813	3,226	-587	-15.4%
Sales & service	60,458	52,290	-8,168	-13.5%
Trades, transport & equipment operators & related work	24,726	22,391	-2,335	-9.4%
Natural resources, agriculture & related production work	4,532	4,133	-399	-8.8%
Manufacturing & utilities	9,831	8,734	-1,097	-11.2%
Unclassified	3,251	2,949	-301	-9.3%
Total jobs	187,733	166,397	-21,337	-11.4%

IN WHAT JOBS DO NIAGARA RESIDENTS WORK?

JOB DEMAND

NWPB measures job demand through the aggregation of online job postings. While this is not a complete measure of all job demand – as it cannot account for informal recruiting, referral networks, and word of mouth hiring – it provides a reliable summary of job postings that the general public are likely to see during their job search activities.

Niagara's measurable job demand seen throughout 2021 adds a COVID-19 relevant context on to job opportunities and compensation patterns (see Figure 2-6). We saw job demand increase throughout 2021 as pandemic-related restrictions were eased. Further, we saw substantial growth in available job posts across many occupations, notably sales and service.

Table 2-5: Job Demand in Niagara, Q1-Q3 2021[16]

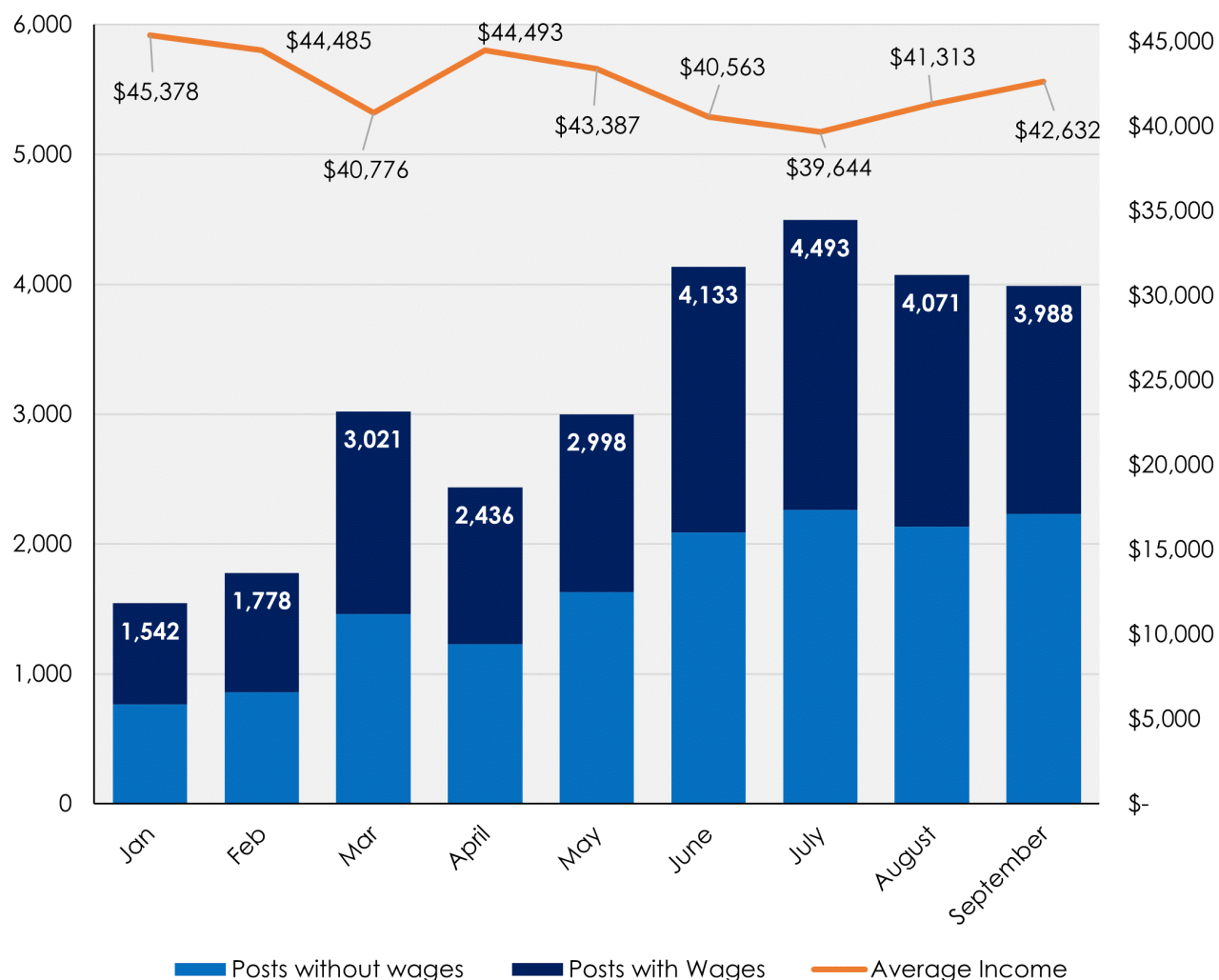
Occupation (1-Digit NOC Classification)	Job Postings		
	Q1 2021	Q2 2021	Q3 2021
Sales & service	2,141	3,534	5,749
Trades, transport & equipment operators & related work	1,066	1,607	1,538
Business, finance & administration	945	1,172	1,321
Education, law & social, community & government services	515	1026	1,110
Management	324	597	793
Health	457	533	701
Manufacturing & utilities	213	371	454
Natural & applied sciences & related work	318	376	366
Natural resources, agriculture & related production work	263	249	345
Art, culture, recreation & sport	99	101	159

[16] NWPB Job Demand Aggregator: Note that NWPB excludes job postings originating on Kijiji.com. Income figures assume full-time equivalent positions.

IN WHAT JOBS DO NIAGARA RESIDENTS WORK?

Figure 2-6 provides a monthly overview of job demand as well as the monthly average income reported across all job postings.

Table 2-6: Job Postings and Average Income, Niagara Region, 2021 [17]



IN WHAT JOBS DO NIAGARA RESIDENTS WORK?

The data seen in Figure 2-6 reflect some of 2021's labour market challenges. March's increase in job postings (a 69.9% increase on February's job postings) likely reflect that some employers were making preparations for seasonal hiring. Despite April's Labour Force Survey data showing an increase in employment, April's job demand data noted a clear decline. The decline in job postings in April likely represented a consequence of Ontario shifting into a provincial lockdown amid the third wave of the COVID-19 pandemic. Following this decline, however, we saw a steady increase in job demand reflecting seasonal hiring trends.

Additional insights on job demand in tourism supporting industries can be found through our [tourism employment dashboard](#). Additional sector-specific insights are available in our [monthly job demand dashboard](#).

TREND TO CONSIDER

Despite unemployment rates being at historic highs and employment rates being at historic lows throughout the pandemic, various employer roundtables and consultations have noted employers reporting a challenge in finding individuals to meet their labour needs. Data from the labour force survey suggests that job seekers actively want to work, but a disconnect between job seekers and employers (despite 2020's job losses noted earlier in this report) is growing more apparent.

NWPB has collected survey data [exploring barriers to employment](#) from a job seeker's perspective. We also collaborated with Trusted Time Inc. and the South Niagara Chamber of Commerce to examine employee attraction and retention strategies that are valued by the workforce.

SECTION 3

IN WHAT INDUSTRIES DO NIAGARA RESIDENTS WORK?

This section looks at local jobs from an industry perspective. In other words, it provides insight on the sector of individuals' employers.

EMPLOYMENT COUNTS

Table 3-1 captures a snapshot of the industries where Niagara residents found employment in 2017 and 2020.

Table 3-1: Industry of Employment, 4-year change, St. Catharines-Niagara CMA[18]

Industry	2017	2020	2017-20 Change	2017-20 % Change
Agriculture	3,200	4,500	1,300	40.6%
Forestry, fishing, mining, quarrying, oil & gas	NA	NA	NA	NA
Utilities	1,700	NA	NA	NA
Construction	13,200	16,400	3,200	24.2%
Manufacturing	22,400	21,100	-1,300	-5.8%
Wholesale & retail trade	32,300	26,200	-6,100	-18.9%
Transportation & warehousing	8,200	7,300	-900	-11.0%
Finance, insurance, real estate, rental & leasing	9,600	10,900	1,300	13.5%
Professional, scientific & technical services	9,900	7,800	-2,100	-21.2%
Business, building & other support services	10,100	10,600	500	5.0%
Educational services	13,500	16,300	2,800	20.7%
Health care & social assistance	24,900	26,400	1,500	6.0%
Information, culture & recreation	9,400	6,400	-3,000	-31.9%
Accommodation & food services	24,500	18,500	-6,000	-24.5%
Other services (except public administration)	9,700	10,900	1,200	12.4%
Public administration	8,000	6,100	-1,900	-23.8%
Total employed	200,800	190,600	-10,200	-5.1%

IN WHAT INDUSTRIES DO NIAGARA RESIDENTS WORK?

Table 3-2 reflects that construction reported the most employment losses among goods-producing industries. However, these data must be considered alongside monthly trends (see Figure 3-3). Therein, the first few months of the COVID-19 pandemic saw a considerable reduction in construction employment. In May 2020, there were 13,400 Niagara residents employed in construction. By August, this figure rose to 17,700 and remained above 18,000 until January 2021.

Table 3-2: Industry of Employment, Annual change, St. Catharines-Niagara CMA[19]

Industry	2019	2020	2019-2020 Change	2019-2020 % Change
Agriculture	4,000	4,500	500	12.5%
Forestry, fishing, mining, quarrying, oil & gas	NA	NA	NA	NA
Utilities	1,500	NA	NA	NA
Construction	18,700	16,400	-2,300	-12.3%
Manufacturing	19,000	21,100	2,100	11.1%
Wholesale & retail trade	31,400	26,200	-5,200	-16.6%
Transportation & warehousing	8,900	7,300	-1,600	-18.0%
Finance, insurance, real estate, rental & leasing	9,700	10,900	1,200	12.4%
Professional, scientific & technical services	8,400	7,800	-600	-7.1%
Business, building & other support services	8,900	10,600	1,700	19.1%
Educational services	14,600	16,300	1,700	11.6%
Health care & social assistance	26,600	26,400	-200	-0.8%
Information, culture & recreation	9,700	6,400	-3,300	-34.0%
Accommodation & food services	24,300	18,500	-5,800	-23.9%
Other services (except public administration)	9,300	10,900	1,600	17.2%
Public administration	8,700	6,100	-2,600	-29.9%
Total employed	204,300	190,600	-13,700	-6.7%

IN WHAT INDUSTRIES DO NIAGARA RESIDENTS WORK?

Manufacturing saw 2,100 additional people employed in 2020 compared to 2019. Consultations with local stakeholders in industry and economic development have noted that 2020 saw a considerable amount of industrial and commercial investment in Niagara, despite the COVID-19 pandemic.

Shifting focus from goods-producing industries to services-producing industries, these data note three industries that were particularly hard hit in 2020: wholesale and retail trade; accommodation and food services; and information, culture, and recreation. Between 2019 and 2020, these three sectors saw 14,300 Niagara residents lose employment.

Figure 3-3: Monthly Industry Employment, St. Catharines-Niagara CMA, 2019-2021 [20]



IN WHAT INDUSTRIES DO NIAGARA RESIDENTS WORK?

JOB COUNTS

Job counts for 2020 add further context to local employment data. Here we see the change in local jobs between 2016 and 2020.

Table 3-4: Industry Job Counts in Niagara 2016-2020 [21]

Industry	2016		2020		2016-2020		
	Jobs	LQ	Jobs	LQ	Job change	% job change	LQ Change
Agriculture, forestry, fishing & hunting	3,751	2.66	3,855	2.96	104	2.8%	0.30
Mining, quarrying, & oil & gas extraction	250	0.35	282	0.39	32	12.6%	0.04
Utilities	1,153	0.86	1,240	0.92	87	7.5%	0.05
Construction	9,040	0.97	8,804	0.97	-236	-2.6%	0.00
Manufacturing	15,265	0.81	14,019	0.82	-1,246	-8.2%	0.01
Wholesale trade	7,257	0.76	7,150	0.79	-107	-1.5%	0.02
Retail trade	24,322	1.20	22,346	1.24	-1,977	-8.1%	0.04
Transportation & warehousing	6,458	0.87	6,643	0.89	186	2.9%	0.02
Information & cultural industries	1,934	0.43	1,641	0.42	-292	-15.1%	-0.01
Finance & insurance	4,582	0.49	4,501	0.49	-80	-1.8%	0.00
Real estate & rental and leasing	2,315	0.68	1,915	0.70	-400	-17.3%	0.03
Professional, scientific & technical services	5,322	0.50	6,068	0.54	746	14.0%	0.04
Management of companies & enterprises	437	0.43	417	0.38	-19	-4.4%	-0.05
Administrative & support, waste management & remediation services	9,618	0.96	9,222	0.98	-396	-4.1%	0.02
Educational services	13,402	0.98	13,392	1.03	-10	-0.1%	0.04
Health care & social assistance	22,836	1.16	22,724	1.19	-111	-0.5%	0.04
Arts, entertainment & recreation	7,463	2.33	4,739	2.08	-2,724	-36.5%	-0.25
Accommodation & food services	24,844	1.87	18,114	1.91	-6,730	-27.1%	0.04
Other services (except public administration)	7,070	1.02	5,909	1.03	-1,160	-16.4%	0.00
Public administration	9,449	0.76	10,465	0.86	1,016	10.8%	0.10
Unclassified	3,191	1.00	2,949	1.05	-241	-7.6%	0.05
Total jobs	179,956		166,397		-13,560	-7.5%	

[21] EMSI Analyst, Niagara Census Division, Job Counts for Employees only, 2021.1 dataset

IN WHAT INDUSTRIES DO NIAGARA RESIDENTS WORK?

Table 3-5 demonstrates that, year-over-year, Niagara lost an estimated 21,337 jobs due to the economic disruption created by the COVID-19 pandemic. In recent years, changes to Niagara's employment indicators were largely due to people moving in and out of employment. Historical large-scale job losses due to employers shutting down were generally overshadowed by job creation activities which created net-job gains for Niagara and, consequently, net-employment gains.

Table 3-5: Industry Job Counts in Niagara 2019-2020 [22]

Industry	2019 Jobs	2020 Jobs	Change	% Change
Health care & social assistance	23,883	22,724	-1,158	-4.8%
Retail trade	24,776	22,346	-2,430	-9.8%
Accommodation & food services	26,474	18,114	-8,360	-31.6%
Manufacturing	15,182	14,019	-1,163	-7.7%
Educational services	14,265	13,392	-873	-6.1%
Public administration	11,218	10,465	-753	-6.7%
Administrative & support, waste management & remediation	10,220	9,222	-998	-9.8%
Construction	9,442	8,804	-638	-6.8%
Wholesale trade	7,579	7,150	-429	-5.7%
Transportation & warehousing	7,008	6,643	-364	-5.2%
Professional, scientific & technical	6,297	6,068	-228	-3.6%
Other services (except public	6,921	5,909	-1,012	-14.6%
Arts, entertainment & recreation	6,793	4,739	-2,054	-30.2%
Finance & insurance	4,594	4,501	-93	-2.0%
Agriculture, forestry, fishing &	3,856	3,855	-1	0.0%
Unclassified	3,251	2,949	-301	-9.3%
Real estate & rental & leasing	2,227	1,915	-312	-14.0%
Information & cultural industries	1,766	1,641	-125	-7.1%
Utilities	1,311	1,240	-71	-5.4%
Management of companies &	390	417	27	7.0%
Mining, quarrying, & oil & gas	281	282	1	0.2%
Total	187,733	166,397	-21,337	-11.4%

IN WHAT INDUSTRIES DO NIAGARA RESIDENTS WORK?

It is also worth noting that many of Niagara's job losses were in sectors that typically pay at or below the regional median (inflation adjusted to 2020 dollars; see Table 3-6). Therefore, the narrative of a K-shaped economic recovery, wherein the recovery will be faster for jobs that exist at a higher level of compensation, should be given due consideration.

Table 3-6: Average Annual Income by Industry, Niagara [23]

Industry	Avg. Wages Per Job	Jobs Lost 2019-2020	% Jobs in Niagara (2020)
Utilities	\$96,140	-5.4%	0.7%
Mining, quarrying, and oil & gas extraction	\$74,021	0.2%	0.2%
Public administration	\$72,971	-6.7%	6.3%
Educational services	\$64,055	-6.1%	8.0%
Professional, scientific & technical services	\$58,917	-3.6%	3.6%
Construction	\$58,127	-6.8%	5.3%
Wholesale trade	\$58,098	-5.7%	4.3%
Manufacturing	\$57,007	-7.7%	8.4%
Transportation and warehousing	\$54,917	-5.2%	4.0%
Management of companies & enterprises	\$53,959	7.0%	0.3%
Finance and insurance	\$50,262	-2.0%	2.7%
Average Employment Income Men[24]	\$48,425	N/A	N/A
Health care & social assistance	\$47,951	-4.8%	13.7%
Information & cultural industries	\$47,100	-7.1%	1.0%
Average Employment Income[25]	\$42,112	N/A	N/A
Real estate & rental & leasing	\$39,106	-14.0%	1.2%
Administrative & support, waste management & remediation services	\$37,544	-9.8%	5.5%
Arts, entertainment & recreation	\$36,952	-30.2%	2.8%
Other services (except public administration)	\$36,856	-14.6%	3.6%
Average Employment Income Women[26]	\$35,369	N/A	N/A
Retail trade	\$27,606	-9.8%	13.4%
Agriculture, forestry, fishing & hunting	\$27,036	0.0%	2.3%
Accommodation & food services	\$21,307	-31.6%	10.9%

[23] EMSI Analyst, Niagara CD, 2021.1 dataset, job counts for employees only. 2016 Census Profile, Niagara CD, with NWPB calculations.

[24-26] From the 2016 census, inflation adjusted to 2020.

IN WHAT INDUSTRIES DO NIAGARA RESIDENTS WORK?

TREND TO CONSIDER

Note that the tourism industry (which combines subsectors of a variety of industries) was heavily impacted by the COVID-19 pandemic. Tourism that depends on indoor activities, which is inclusive of casino operations – Niagara's employment sector with the highest 2019 location quotient – continues to be impacted.

NWPB has conducted extensive research on the potential impacts of COVID-19 on the local tourism economy in our Post Pandemic Scenario Planning report. This report houses comprehensive estimates of employment in tourism, and explores potential future scenarios that explore how those trends may change in the years to come. The report is available [through this link](#). We also have a monthly [dashboard](#) which reports on monthly tourism employment trends.

SECTION 4

MEASURES OF AVAILABLE LABOUR SUPPLY

Although the COVID-19 pandemic has seen people moving into and out of the labour force in previously unseen numbers, case data from Niagara's Employment Ontario Employment Services (ES) providers allow us to offer insights on a segment of the available labour supply in Niagara.

It is important to note that these data may not reflect the dynamic changes taking place amongst both employment transformation, and the pandemic's impacts on individuals' use of services due to federal and provincial funding supports.

Between April 2020 and March 2021, Niagara's Employment Services providers reported on 3,225 assisted service clients (i.e., clients receiving specific ES services like job search or placement activities), and 3,726 unassisted R&I clients (i.e., any member of the community utilizing freely available resources and information[R&I]). Over 40% of assisted clients were between the ages of 25-44 years old, as seen in Table 4-1.

Table 4-1: Age Cohorts for Niagara ES Clients, 2020-21 [27]

Age	Number of Employment Services Clients	Percentage of Employment Services Clients
15-24	678	21.0%
25-44	1,377	42.7%
45-64	1,093	33.9%
65 and older	76	2.4%

[27] Employment Ontario Case Management System, 2020-21, Niagara Region. Note that these data separate Second Career clients from ES resulting in lower ES client and outcome counts.

MEASURES OF AVAILABLE LABOUR SUPPLY

Table 4-2 shows the top five industries where ES clients found their most recent experience. The most common industries in which clients previously worked were accommodation and food services and administrative support services.

Table 4-2: Top 5 Industries at Time of Layoff for Niagara ES Clients, 2020-21 [28]

Industry	Client Count
Accommodation & Food Services	413
Administrative & Support & Waste Management & Remediation Services	195
Manufacturing	172
Retail Trade	165
Construction	154

Table 4-3 expands on this data by showing the occupation in which ES clients were most recently employed. Therein, the data shows that a large segment of employment service clients had relevant work experience in customer-facing, sales occupations. There also was a sizeable cohort of individuals with training in the skilled trades or occupations that could lead to apprenticeship training.

Table 4-3: Top 10 Occupations at Time of Layoff for Niagara ES Clients, 2020-21 [29]

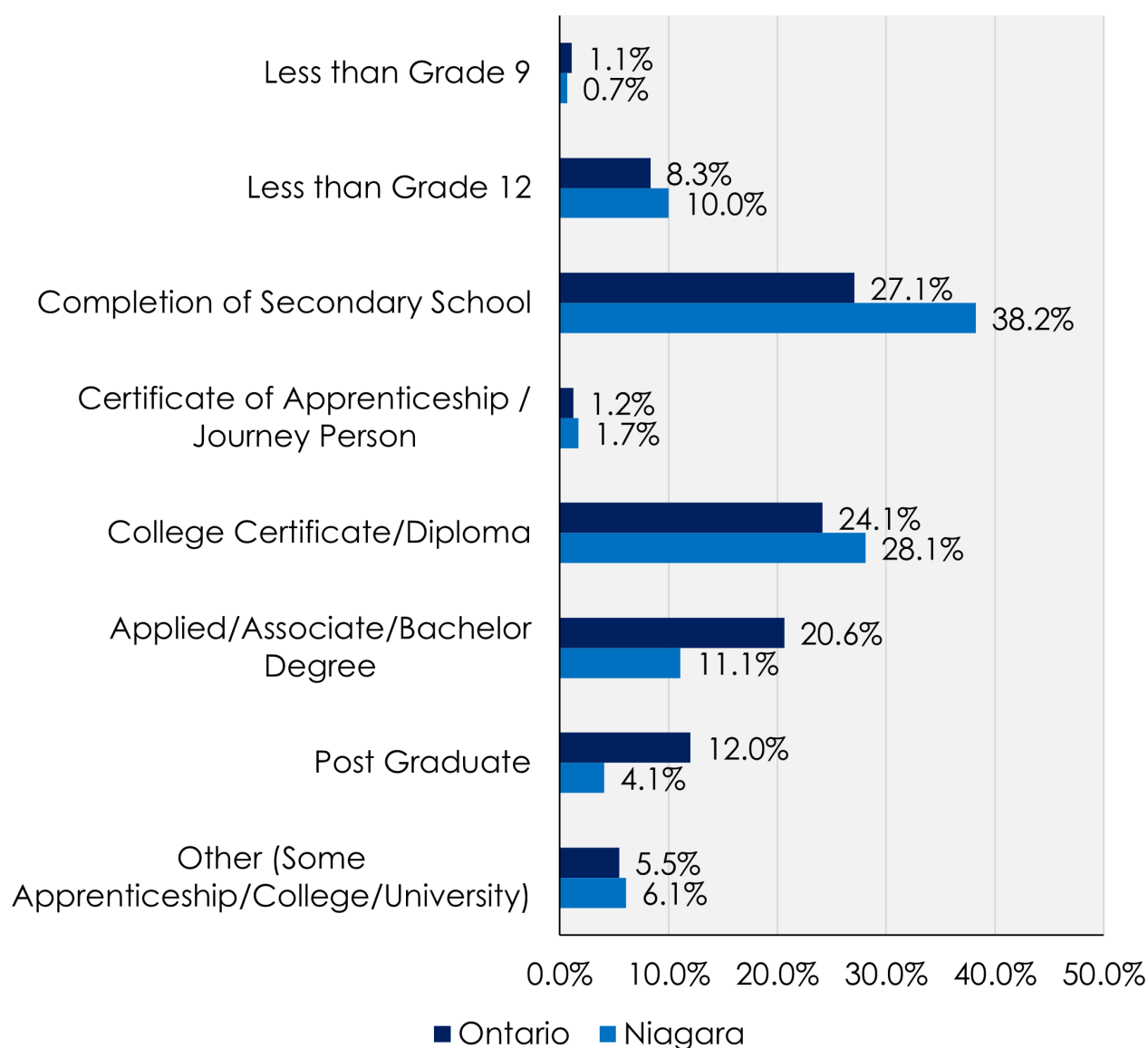
Occupation	Client Count
Service support & other service occupations, n.e.c.	220
Service representatives & other customer & personal services occupations	218
Service supervisors & technical service occupations	128
Labourers in processing, manufacturing & utilities	120
Sales representatives & salespersons - wholesale & retail trade	110
Sales support occupations	106
Trades helpers, construction labourers & related occupations	105
Administrative & financial supervisors & administrative occupations	103
Industrial, electrical & construction trades	97
Transport & heavy equipment operation & related maintenance occupations	71

[28,29] Employment Ontario Case Management System, 2020-21, Niagara Region. Note that these data separate Second Career clients from ES resulting in lower ES client and outcome counts.

MEASURES OF AVAILABLE LABOUR SUPPLY

Figure 4-4 compares the educational background of ES clients in Niagara and Ontario. These data provide a high-level insight on the level of formal training that ES clients can offer to employers. The data notes that the vast majority of employment services clients have completed at least secondary school.

Table 4-4: Educational Attainment for ES Clients in Ontario and Niagara, 2020-21 [30]



[30] Employment Ontario Case Management System, 2020-21, Niagara Region. Note that these data separate Second Career clients from ES resulting in lower ES client and outcome counts.

MEASURES OF AVAILABLE LABOUR SUPPLY

Table 4-5 shows the length of time ES clients reported they were out of employment. The largest group of ES clients (34.6%) reported being out of employment or training for less than three months. This reflects an available workforce whose skills are still closely aligned to current labour market needs.

Table 4-5: Length of Time Out of Employment For ES Clients, Niagara, 2020-21 [31]

Length of Time Out of Employment	Count	Percentage
Less than 3 months	1,116	34.6%
3 - 6 months	663	20.6%
6 - 12 months	635	19.7%
More than 12 months	565	17.5%
Unknown	246	7.6%
Total	3,225	100.0%

SECTION 5

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

EMPLOYER PROFILE

NWPB typically uses data from the Canadian Business Counts (CBC) to produce an estimate of the number of businesses in Niagara (n.b. this measure is inclusive of for-profit, non-profit, and charities). These data also report on the sector in which local businesses operate. The challenge in reporting on this data is that the CBC were never engineered to keep pace with the rapid change that COVID-19 has brought into the economy.

For example, when a business closes, it can take up to three years before the business is removed from the business counts. That means year-over-year comparisons will not capture the worst impacts of the pandemic on Niagara. Yet in the absence of other sources, the Canadian Business Counts remain the only tool to provide a headcount of local industries.

Though the pandemic has impacted these data, we believe they remain a useful tool for two principal functions:

1. Establishing context on Niagara's business profile.
2. Measuring the potential scope of an employer trend as identified through an additional survey (e.g. the Niagara COVID-19 Business Impacts Survey or the Canadian Survey of Business Conditions).

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

With these limitations in mind, Table 5-1 presents a snapshot on the number of businesses that the Canadian Business Counts estimated to be operating in Niagara. These are employers with employees; in 2021 there are an additional 28,910 businesses without employees (e.g., self-employed operations).

Table 5-1 also outlines the change in the number of employers in Niagara by employer size over four years.

Table 5-1: December 2018 and June 2021 Business Count Estimates by Employer Size, Niagara Region [32]

Size of Employer	2018 count	2021 count	Change
1-4 employees	6,600	7,076	476
5-9 employees	2,880	2,731	-149
10-19 employees	1,830	1,746	-84
20-49 employees	1,274	1,190	-84
50-99 employees	465	431	-34
100-199 employees	179	161	-18
200-499 employees	74	57	-17
500 + employees	24	26	2
Total	13,326	13,418	92

Table 5-1 shows that slightly more than 73% of all businesses in Niagara employed 9 or fewer employees. Where the conventional definition of a small-to-medium enterprise – which includes all operations with fewer than 500 employees – captures 99.8% of business activity in Niagara, looking at employers with fewer than ten employees places a specific emphasis on the “small” cohort of small-to-medium enterprises.

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Table 5-2 outlines the change in the number of employers in Niagara by 3-digit NAICS over the past four years. This table outlines the top 20 largest industries.

Table 5-2: December 2018 and June 2021 Business Count Estimates by Industry, Niagara Region [33]

Industry	2018 count	2021 count	Change
238 - Specialty trade contractors	1,144	1,143	-1
541 - Professional, scientific & technical services	1,034	1,060	26
621 - Ambulatory health care services	976	1,002	26
722 - Food services & drinking places	997	942	-55
561 - Administrative & support services	552	551	-1
531 - Real estate	418	542	124
236 - Construction of buildings	423	449	26
813 - Religious, grant-making, civic, & professional and similar organizations	471	433	-38
811 - Repair & maintenance	409	411	2
812 - Personal & laundry services	357	363	6
111 - Crop production	367	357	-10
445 - Food & beverage stores	370	352	-18
484 - Truck transportation	322	339	17
448 - Clothing & clothing accessories stores	306	274	-32
453 - Miscellaneous store retailers	233	252	19
446 - Health & personal care stores	236	247	11
624 - Social assistance	183	228	45
523 - Securities, commodity contracts, & other financial investment and related activities	170	181	11
623 - Nursing & residential care facilities	174	176	2
713 - Amusement, gambling & recreation industries	187	167	-20

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

The following set of tables outline the total number of employers by employee size range, and the four-year change in business counts for local industries.

Table 5-3: Micro-Businesses (1-4 Employees) - December 2018 and June 2021 Business Count Estimates by Industry, Niagara Region [34]

Industry	2018 count	2021 count	Change
Agriculture, forestry, fishing and hunting	216	206	-10
Mining, quarrying, and oil and gas extraction	4	3	-1
Utilities	9	13	4
Construction	949	988	39
Manufacturing	205	212	7
Wholesale trade	240	201	-39
Retail trade	634	649	15
Transportation and warehousing	345	365	20
Information and cultural industries	81	73	-8
Finance and insurance	231	261	30
Real estate and rental and leasing	340	492	152
Professional, scientific and technical services	739	759	20
Management of companies and enterprises	16	19	3
Administrative and support, waste management and remediation services	281	312	31
Educational services	50	55	5
Health care and social assistance	698	726	28
Arts, entertainment and recreation	88	88	0
Accommodation and food services	245	278	33
Other services (except public administration)	797	834	37
total	6,168	6,534	366

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Table 5-4: Small Businesses (5-99 Employees) - December 2018 and June 2021 Business Count Estimates by Industry, Niagara Region [35]

Industry	2018 count	2021 count	Change
Agriculture, forestry, fishing and hunting	276	255	-21
Mining, quarrying, and oil and gas extraction	8	7	-1
Utilities	12	7	-5
Construction	682	672	-10
Manufacturing	407	399	-8
Wholesale trade	264	265	1
Retail trade	1,200	1,123	-77
Transportation and warehousing	187	175	-12
Information and cultural industries	80	74	-6
Finance and insurance	237	231	-6
Real estate and rental and leasing	149	113	-36
Professional, scientific and technical services	286	293	7
Management of companies and enterprises	23	28	5
Administrative and support, waste management and remediation services	281	260	-21
Educational services	79	71	-8
Health care and social assistance	606	644	38
Arts, entertainment and recreation	163	149	-14
Accommodation and food services	865	781	-84
Other services (except public administration)	478	417	-61
Public administration	5	4	-1
total	6,288	5,968	-320

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Table 5-5: Medium Businesses (100-499 Employees) - December 2018 and June 2021 Business Count Estimates by Industry, Niagara Region [36]

Industry	2018 count	2021 count	Change
Agriculture, forestry, fishing and hunting	16	15	-1
Utilities	0	2	2
Construction	11	9	-2
Manufacturing	29	29	0
Wholesale trade	11	7	-4
Retail trade	41	41	0
Transportation and warehousing	9	12	3
Information and cultural industries	3	1	-2
Finance and insurance	6	1	-5
Real estate and rental and leasing	0	1	1
Professional, scientific and technical services	8	5	-3
Management of companies and enterprises	6	4	-2
Administrative and support, waste management and remediation services	17	6	-11
Educational services	5	5	0
Health care and social assistance	30	39	9
Arts, entertainment and recreation	9	4	-5
Accommodation and food services	37	24	-13
Other services (except public administration)	2	3	1
Public administration	9	9	0
total	249	217	-32

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Table 5-6: Large Businesses (500+ Employees) - December 2018 and June 2021 Business Count Estimates by Industry, Niagara Region [37]

Industry	2018 count	2021 count	Change
Construction	0	1	1
Manufacturing	2	2	0
Transportation and warehousing	1	1	0
Professional, scientific and technical services	1	3	2
Administrative and support, waste management and remediation services	4	3	-1
Educational services	4	5	1
Health care and social assistance	5	6	1
Accommodation and food services	3	2	-1
Public administration	4	3	-1
total	24	26	2

Niagara was also home to 28,910 zero-employee businesses as of June 2021. These businesses typically represent self-employed individuals. Table 5-7 captures the industry sectors in which these businesses most frequently operate.

Table 5-7: June 2021 Self-Employed/Zero-Employee Business Count Estimates by Industry, Niagara Region [38]

Industry Sector	Establishment Count	% of Establishments
Real estate	8,363	28.9%
Professional, scientific & technical services	2,567	8.9%
Specialty trade contractors	1,533	5.3%
Securities, commodity contracts, & other financial investment & related activities	1,311	4.5%
Ambulatory health care services	1,126	3.9%
Administrative & support services	890	3.1%
Construction of buildings	846	2.9%
Personal & laundry services	775	2.7%

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Table 5-7 notes that zero-employee businesses operating in real estate represent more than a quarter of all self-employment in Niagara. The next largest sector, professional scientific and technical services, is slightly less than one tenth of zero-employee businesses.

As mentioned on page 33, the nature of the Canadian Business Counts' methodology renders it impossible to see the impact of COVID-19. But when we pair the CBC data with insights from the Niagara COVID-19 Business Impact Survey (NCBIS), we can estimate what that local survey's findings would look like when they are scaled up to a regional level.

EMPLOYER INSIGHTS

NWPB collaborated with Niagara Economic Development and the Niagara Economic Rapid Response Team to ensure that our data gathering needs were harmonized with broader community efforts. As such, NWPB is able to draw on the insights of 786 employers who completed the third delivery of the Niagara COVID-19 Business Impact Survey[39]. Table 5-8 provides a snapshot of how these survey respondents rated the overall status of their business at the time of the survey's delivery between March 29 and April 16, 2021.

Table 5-8: Current Status of Business, All Respondents [40]

Status of Business	Responses
At risk of imminent permanent closure	6.7%
Vulnerable to closure	20.4%
Stable	24.7%
Sustaining	36.2%
Doing well	12.0%

[39] NWPB gratefully acknowledges the support of Niagara Region Economic Development and all of Niagara's municipalities for the facilitation of this data.

[40] Niagara COVID-19 Business Impact Survey, 3rd Delivery, Niagara Economic Rapid Response Team

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Almost 73% of the 716 business responding to this question reported that they were either stable, sustaining, or doing well. This is a considerable improvement compared to the June 2020 NCBIS survey; therein, only 65.4% of respondents reported that their condition was stable, sustaining, or doing well. Despite the positive overall trend, the situation for local tourism supporting employers is quite different.

Table 5-9 shows that among tourism-oriented employers responding to the NCBIS, only 55.2% rated their status as stable or better. Nearly one in ten was at risk of imminent permanent closure and more than one-third were vulnerable to closure. These trends are closely aligned with the tourism employment data that NWPB has been tracking since the summer of 2020 and can be **[found at this link](#)**. NWPB's most recent estimates note that employment in tourism among Niagara residents fell to its lowest point in March of 2021 with an estimated 18,672 people employed in supporting industries. For context, the March 2021 figure is 47.7% of the estimated 39,134 people who were employed in tourism in February 2020.

Table 5-9: Current Status of Business, Self-Identified Tourism-Oriented Employers [41]

Status of Business	Responses
At risk of imminent permanent closure	9.2%
Vulnerable to closure	35.6%
Stable	9.2%
Sustaining	44.2%
Doing well	1.8%

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Amid the uncertainty of the third wave of the COVID-19 pandemic, data from the NCBIS also offer some insights on potential sectors of employment growth. Table 5-10 notes the number of hires respondents expected to make, broken down by sector, over the next six months.

Table 5-10: NCBIS Respondents Anticipated 6 month Hiring [42]

Industry	Anticipated Full-Time hires	Anticipated Part-Time hires
Accommodation & food services	223	438
Manufacturing	173	97
Arts, entertainment & recreation	169	414
Agriculture, forestry, fishing & hunting	88	21
Finance & insurance	53	5
Construction	48	4
Management of companies & enterprises	40	10
Retail trade	38	88
Other services (except public administration)	29	26
Professional, scientific & technical services	27	14
Utilities	22	0
Transportation & warehousing	20	12
Educational services	15	43
Health care & social assistance	12	19
Real estate, & rental & leasing services	12	0
Wholesale trade	9	6
Administrative & support, waste management & remediation services	4	4
Information & cultural industries	1	3
Total	983	1,204

EMPLOYER PROFILE AND EMPLOYER INSIGHTS

Respondents who anticipated making full-time hires in the next six months were most frequently found in accommodation and food service, manufacturing, and arts, entertainment and recreation. Respondents who anticipated making the most part-time hires operated in the same sectors, with accommodation and foods services expecting the most hires and arts, entertainment, and recreation reporting that part-time hires would more than double that sector's expected full-time hires. These sectors are all among Niagara's largest employment drivers. It is also noteworthy that employment in manufacturing is often highly skilled and well compensated.

While these data reflect some cause for optimism, they must also be placed in an appropriate context. Table 5-11 compares the number of survey respondents who anticipated hiring over the next six months compared to those who either reported zero anticipated hires or did not answer the question.

Table 5-11: Employers Expecting to Hire Over the Next Six Months [43]

Anticipate Hiring in the next 6 months	Full-Time Hires	Full- Time %	Part Time Hires	Part- Time %
Yes	212	27.0%	203	25.8%
No	178	22.6%	168	21.4%
<i>Did not answer</i>	396	50.4%	415	52.8%
Total	786	100.0%	786	100.0%

SECTION 6

CONSULTATION INSIGHTS AND THEMES

Throughout the 2021-22 fiscal year NWPB engaged in consultations in a variety of ways. For employer insights, we partnered with the Niagara Economic Rapid Response Team's Wave 3 of the Business Impact Survey. Results from these consultations are described in detail in Section 5 of this report.

Other consultation methods included engaging with a variety of community stakeholders throughout the year including:

- **The local Employment Ontario network**
 - Literacy and Basic Skills managers
 - Employment Services managers and job developers
 - FedCap (Service System Manager)
- **Local government** (e.g., economic development teams, updating local MPs with labour force data insights, etc.)
- **Community stakeholders and organizations** (e.g., youth, industry-specific associations, Chambers of Commerce, school board representatives, post-secondary education representatives)
- **Outreach through a variety of media methods** (e.g., podcast discussions, sharing findings through social media, sharing labour force updates through local newspapers)

A subset of our consultations asked specific questions about pandemic employment impacts. These consultations included the following question relating to employment: **what kind of challenges have you/have you heard others encounter over the last 16 months?** Responses fell within themes such as:

- Lack of employers that were hiring and a limited number of available jobs that were a good fit/met needs
- Employer needs have shifted and increased (in terms of skills and experience required)
 - Some consultations noted that compensation did not always reflect these increased responsibilities
- Unpredictable and inconsistent employment
- Technological barriers to engaging with potential employment opportunities (e.g., barriers to applying for work)

We see that the impacts that have been encountered throughout the past year and a half have been widespread and range from challenges applying to jobs, to difficulties finding suitable employment. Other consultations we engaged in were fairly informal, with information and insights gleaned from the community through ad hoc meetings and discussion. Through these consultations, we saw a series of themes emerge. Some of these needs were addressed in projects completed in both the 2020-21 and 2021-22 fiscal years, and some will be addressed in work moving forward (as outlined in our Action Plan update in the following section).

CONSULTATION INSIGHTS AND THEMES

PANDEMIC IMPACTS ON WOMEN, YOUTH, AND SPECIFIC INDUSTRIES/OCCUPATIONS

Many discussions over the past year were focused on particular demographic groups that were heavily impacted throughout the pandemic. In the 2021-22 fiscal year NWPB produced a gender-focused report examining both historical and current employment trends for men and women in Niagara. This work aligned with Niagara Region's Niagara's Community Safety and Well-being Plan, 2021-2025 in which they indicate a need for gender equality and inclusion both within an economic development strategy and post-pandemic recovery efforts. Given the continued interest in this information, we were able to refer to this already-completed report, in addition to our monthly employment updates in our 2021-22 Tourism and Gender Employment project.

There also was interest on the impact on employment for local youth. Given that one of our 2021-22 partnership projects investigated this particular cohort, we again, were able to refer to these data needs in a timely manner.

In addition to cohort-specific impacts, conversations NWPB engaged in throughout the year typically resulted in discussion around barriers for individuals both in terms of 1) securing employment, and 2) finding stable employment. Some common areas of interest that we plan to continue investigating are:

- The care economy
- Early childhood education
- Child care
- The accommodations and food services industry
- The construction and manufacturing industries



CONSULTATION INSIGHTS AND THEMES

ADDITIONAL INSIGHTS ON NEWCOMERS AND INDIGENOUS POPULATIONS

Over the past year, requests for insights on newcomer and immigrant employment data, in addition to information related to the Indigenous community have increased. While some data are available from the 2016 Census and quarterly insights on newcomers are available from the IRCC, limited data are available that provide real-time information for these two populations. While we were able to provide some high-level insights, given that these themes have been recurring, future work could include the following:

- Opportunity to potentially collaborate with the Niagara Region Women's Advisory Committee and Niagara Region's Diversity Equity and Inclusion Advisory Committee for insights on local trends
- A partnership opportunity with Niagara Region on the next Niagara Employer Inventory (early 2022)
- Incorporation of the 2021 Census information in our upcoming labour market reporting as data become available
- Building partnerships with Indigenous youth training and education organizations through involvement with Niagara Peninsula Aboriginal Area Management Board and Niagara College's collaborative bridging program (MPOWER)
- Aligning work to support Niagara Region's Niagara's Community Safety & Well-being Plan 2021-2025



CONSULTATION INSIGHTS AND THEMES

A MORE COMPREHENSIVE EXAMINATION ON THE WORLD OF WORK

A third theme that emerged through conversations and consultations over the past year is the “new world of work”. In other words, how has the pandemic impacted the way employers and employees operate, what might this mean for the world of work, and what other implications may there be for these changes? For example, we repeatedly heard the following topics emerge from conversations on the world of work

- **Shifts to remote work:** what might the impacts be on labour force availability, mobility, and job demand? What are some of the ways wages and housing affordability/housing in general relate to an increasingly remote work force?
- **What is the perceived labour shortage due to:** is it industry specific or a more general phenomenon; does it look different across sectors; is it related to a skills mismatch; what does industry churn look like; are people re-training and working in different industries; might there be other factors contributing to the shortage?
- **The integration of work and employment with other aspects of life:** some conversations indicated that discussion of employment and other factors such as housing, mental health, and family/childcare need to be held as one inclusive conversation rather than as silo-ed concepts. NWPB also had the opportunity to attend Niagara Region’s Economic Strategy workshops and found that the theme of integrating work and well-being was a theme brought up through conversations in the sessions.



CONSULTATION INSIGHTS AND THEMES

In addition to the above insights from our consultations across this past year, NWPB is also involved in local working groups which help inform project priorities:

- Niagara Economic Rapid Response Team Taskforce
- Ontario Tourism Education Corporation (OTEC) – Niagara Working Group
- Niagara Community Observatory Agriculture Advisory Group
- Niagara Industrial Association (NIA)
- Niagara Peninsula Aboriginal Area Management Board (NPAAMB) Youth Navigation Collaborative Committee
- Niagara Local Immigration Partnership (LIP) group
- Ad hoc planning tables and discussions with local Chambers of Commerce, Niagara Region, community services, St. Catharines Community Working Group, and participation in Niagara Region Economic Development Strategy workshops amongst others

Given the wide range of interests and the breadth of conversations that are being had, there is more investigation and conversations to be had throughout the 2022-23 year. Our updated action plan provides insight on some initial steps to investigating these increasingly complex issues.

In addition to work outlined in our action plan, we continually compare these local findings and themes with trends that we see provincially and nationally. Some of the reports we refer to include:

- **A Feminist Economic Recovery Plan for Canada: Making The Economy Work for Everyone** (July 2020)
- **The She-covetry: Confronting the Gendered Economic Impacts of COVID-19 in Ontario** (September 2020)
- **A Healthy Environment and a Healthy Economy**, from Environment and Climate Change Canada (March 2021)
- **Mno Bmaadziwin Living the Good and Healthy Life** Indigenous Engagements Report for the Region of Niagara, by Niagara Chapter-Native Women Inc. (March 2021)
- **Federal budget 2021** (April 2021)
- **Niagara's Community Safety and Well-being Plan 2021-2025** (June 2021)
- **State of Youth report**, Government of Canada (August 2021)
- **Preventing a Lockdown Generation: A Plan to Support Canada's Youth in Post-Pandemic Recovery**, YMCA and YWCA Canada (August 2021)
- Local community wellbeing reports, such as **Living in Niagara** (2020) and **Vital Signs Hamilton** (2021)
- **"Connecting the Pieces: An Evaluation of the Niagara Prosperity Initiative and Call for a Broader Poverty Reduction Strategy for Niagara" report** (2020)

ACTION PLAN

COVID-19 has demonstrated the need for flexibility and a future-focused vision in planning workforce development. NWPB has been engaged in consistent communication with stakeholders and partners in attempting to navigate the new landscape of Niagara's labour market. Last year these changes invited us to set aside our pre-COVID-19 action plan and develop a new plan that positioned us to build on the lessons learnt throughout the pandemic.

As such, our new action plan continues to focus on three strategic themes:

1. Mobilizing labour market data to support community stakeholders
2. Enhancing current and forecast labour market demand insights
3. Expanding data targeted to marginalized, at-risk, and identified populations as a means of supporting stronger employment outcomes

The following outline of our proposed 2022-23 activities will speak to how NWPB will support these themes and offer a roadmap to how they can be expanded to support the Niagara region based on changing labour market needs as Niagara emerges from COVID-19.



ANNUAL LABOUR MARKET REPORT

Strategy	Mobilizing labour market data to support community stakeholders	Enhancing current and forecast labour market demand insights	Expanding data targeted to marginalized, at risk, and identified populations as a means of supporting stronger employment outcomes
2021-22 Successes	<ul style="list-style-type: none"> • In Spring 2021 NWPB produced an interim labour market report (in addition to our annual report). This strategy allowed us to provide timely insights on trends. • Quarterly briefing notes highlighting current trends: NWPB provided these as a way to share information as conversations around labour market trends arose. • Expansion of public-facing job demand tools on NWPB.ca: In 2020, NWPB - in consultation with Workforce Windsor-Essex - developed new tools to enhance real-time measures of job demand and labour supply in Niagara. NWPB continued to refine our use of these tools as part of our strategy to deliver timely and relevant labour market research. • Continued publishing of the re-developed Eye on Employment: NWPB published the monthly Eye on Employment report, and engaged in frequent sharing of data through our local media outlets. • Increased the scope of labour market insights: Throughout 2020-21 and 2021-22 we saw the pandemic disproportionately impacted different segments of our population; data related to gender and age were included in our annual report. 		
2022-23 Activities	<ul style="list-style-type: none"> • Continue to broaden our engagement to ensure that feedback across multiple segments of our population are incorporated. • Produce a Spring 2022 interim report to help facilitate the consultation process that will inform our annual labour market report • Incorporate the 2021 Census data in the annual labour market report. • Our 2022-23 plan will continue to provide monthly labour market updates, with data insights being widely shared with stakeholders across the region • NWPB has the opportunity to collaborate with Niagara Region on the 2022 update to the Niagara Employer Inventory. This inventory will include a more comprehensive set of questions on demographics to ensure all population groups are represented. Though this activity will start in January 2022, we expect to utilize these insights throughout the 2022-23 annual labour market report. 		
Near-to-medium future term plans beyond 2022-23	<ul style="list-style-type: none"> • Continue to seek out new collaboration and partnership opportunities to 1) inform the content of the annual labour market report, and 2) promote the findings of the annual labour market report. • Ensure that the annual labour market report remains relevant to emerging pressures created by the COVID-19 pandemic. • Continue to consult for insights on labour market trends for newcomers to Niagara and the Indigenous community • Identify additional paths to broaden NWPB's audience as data become an increasingly essential part of Niagara's pandemic recovery. 		

ONGOING TOURISM AND GENDER-FOCUSED EMPLOYMENT IMPACTS OF COVID-19

Strategy	Mobilizing labour market data to support community stakeholders	Enhancing current and forecast labour market demand insights	Expanding data targeted to marginalized, at risk, and identified populations as a means of supporting stronger employment outcomes
2021-22 Successes	<ul style="list-style-type: none"> Created a monthly tourism and women's employment dashboard: As this sector and demographic are linked, the employment disruptions caused by COVID-19 had a strong impact on both. We provided ongoing observation to provide timely insights on employment situations Production of quarterly briefing notes on emerging tourism trends in Niagara: The production of quarterly briefing notes on this project ensured that NWPB provided resources and insights related to larger labour market trends that were emerging and how tourism has been impacted. Production of an annual retrospective report on how tourism and gender-based employment changed during 2021: The retrospective report summarized the findings of the quarterly briefing notes, noted how trends may have changed, and outlined best practices that have been identified for supporting either women's labour market participation or employment in tourism-supporting sectors. 		
2022-23 Activities	<ul style="list-style-type: none"> Continue tracking employment impacts on sectors that were particularly hard-hit throughout the pandemic. This examination will expand to take a more comprehensive examination on industry and gendered-employment trends in Niagara. Identify local initiatives that support women's employment/labour force participation, providing data and insights where relevant. It will be vital to engage with individuals to ensure supports that help promote sustainable and predictable employment opportunities are available. Leverage 2021 census data to create an authoritative pre-and post-pandemic understanding of tourism employment and women's employment/labour force participation. 		
Near-to-medium future term plans beyond 2022-23	<ul style="list-style-type: none"> As custom data orders from the 2021 census become available, we will provide additional insights related to tourism and gender-focused employment trends. Continue to track local initiatives that support either women's employment/ labour force participation, providing data and insights where relevant. Maintain ongoing sectoral and demographic analysis to support a rapidly changing employment landscape during the COVID-19 recovery. 		

EMPLOYER AND EMPLOYEE ADJUSTMENTS TO COVID-19

Strategy	Mobilizing labour market data to support community stakeholders	Enhancing current and forecast labour market demand insights	Expanding data targeted to marginalized, at risk, and identified populations as a means of supporting stronger employment outcomes
2021-22 Successes	<ul style="list-style-type: none"> Expanded the quality control on NWPB's job demand aggregator, leading to the production of sector-specific employment opportunity profiles: NWPB's job demand aggregator expanded to allow for the creation of reports that focus on job demand in Niagara's key employment sectors. Produce monthly and quarterly job demand reports to support local pandemic recovery and planning: These activities built on the demonstrated record of success NWPB has achieved with our Employment Prospects Series which provided strategic insights on consistently in demand occupations in Niagara to our partners in Employment Services and Literacy and Basic Skills. 		
2022-23 Activities	<ul style="list-style-type: none"> Incorporate the new National Occupation Classifications for 2021 into data products and tools through collaboration with Workforce Windsor-Essex. The 2021 NOC updates provide changes both to occupational classifications and codes, and the skills taxonomies. Continue providing insights on in-demand jobs and skills Expand self-service options for community research: Working with partners in Employment Services, Literacy and Basic Skills, and municipal government, NWPB anticipates expanding the self-service options on our job demand aggregator and data tools. This will allow for rapid and real-time insights to support micro-credential program creation and long-term career planning. 		
Near-to-medium future term plans beyond 2022-23	<ul style="list-style-type: none"> Explore opportunities to build and expand meaningful definitions on in-demand skills: NWPB's job demand aggregator has the capacity to be expanded to support integration with a variety of internationally recognized skill taxonomies. Integrating these products into our aggregator will allow for the creation of a locally-focused skills inventory that will help job seekers leverage their existing skills and train for the jobs that will be essential to the recovery from COVID-19. 		

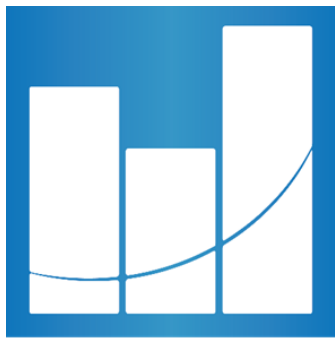
UNDERSTANDING BARRIERS TO EMPLOYMENT

Strategy	Mobilizing labour market data to support community stakeholders	Enhancing current and forecast labour market demand insights	Expanding data targeted to marginalized, at risk, and identified populations as a means of supporting stronger employment outcomes
2021-22 Successes	<ul style="list-style-type: none"> • Develop a workforce-facing survey that explores if/how COVID-19 has created new barriers to employment – this survey helped identify these barriers, and was a first step to providing specific insights for job seekers. • Explore the findings of this survey through employer consultations – To add context to the employee survey's findings, partnered with the Niagara Economic Rapid Response Team to engage employers and identify barriers as a result of the pandemic. • Ongoing collaboration and coordination with Niagara Region on data collection and analysis activities – To reduce survey fatigue among employers, who we know to be focused on maintaining business operations amid the pandemic, NWPB has coordinated our data gathering efforts through Niagara Region Economic Development and the Regional Economic Rapid Recovery Team. 		
2022-23 Activities	<ul style="list-style-type: none"> • Incorporate 2021 Census data to reporting as these data will provide information on how the pandemic impact employment for individuals. While these trends may have shifted, we will have in-depth insights on trends like commuter flow and workforce migration • Explore how commuter flow to and from Niagara has changed with the pandemic – Previous research conducted in partnership with Community Benchmarks reflects the fact that Niagara has a strong degree of commuter and migration flow with the Hamilton Census Division. As remote working increased throughout the pandemic it will be important to explore how these trends may have changed. • Leverage data from the 2021 Niagara Employer Inventory; given the ongoing disruption of the pandemic, these data will provide real-time insights from employers. 		
Near-to-medium future term plans beyond 2022-23	<ul style="list-style-type: none"> • Continue partnering with groups that engage employers and the workforce; this will help reduce both survey fatigue, but also ensure that parties working towards similar priorities are collaborating. This includes partnering with organizations that represent individuals (both from the employee and employer perspective) who have been marginalized and underrepresented. 		

YOUTH EMPLOYMENT 2.0

Strategy	Mobilizing labour market data to support community stakeholders	Enhancing current and forecast labour market demand insights	Expanding data targeted to marginalized, at risk, and identified populations as a means of supporting stronger employment outcomes
2021-22 Successes	<ul style="list-style-type: none"> Produce a report on the impact of COVID-19 on Niagara's youth labour force – In 2018, NWPB partnered with Niagara Region Economic Development to produce a comprehensive youth employment strategy. As youth in Niagara saw significant levels of unemployment and labour force alienation during the pandemic, NWPB will be preparing an update on the state of youth employment amid COVID-19. This year's report involved consulting with local youth in order to capture policy insights that would support youth recovery in 2021 and beyond. This work included the creation of a youth employment dashboard as a means of providing public-facing insights on youth employment. 		
2022-23 Activities	<ul style="list-style-type: none"> Assessment of Census 2021 data as it applies to youth employment – The release of the 2021 census will bring with it a wealth of new data on youth and youth employment outcomes. A comprehensive review of this data will help guide pandemic recovery. Increase the diversity of youth representing in project work. This will be done through partnerships with local organizations that work with local youth. 		
Near-to-medium future term plans beyond 2022-23	<ul style="list-style-type: none"> As custom data orders from the 2021 census become available, we will provide additional insights related to youth employment trends. These data may also serve as a way to refreshed data from NWPB's 2019-20 in-demand skilled trades project (a project leveraged through partnerships with local employment service providers and the Niagara Industrial Association). The findings of the 2021 Census would allow us to update this document as a tool to steer pathways to full-time and stable employment for youth who face long-term consequences of beginning their careers amid an economic slowdown. 		

LOCAL LABOUR MARKET PLANNING REPORT



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For additional information on the local labour market, and to review previous publications, please visit our website at www.nwpb.ca

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