



**NIAGARA  
WORKFORCE  
PLANNING BOARD**

# **LOCAL LABOUR MARKET PLANNING REPORT**

**2020-21**

# CONTENTS

- Message from the CEO ..... **3**
- About NWPB ..... **4**
- Our Board of Directors ..... **5**
- Executive Summary ..... **6**
- Section 1: What Industries are in Niagara? ..... **8**
- Section 2: Who is Living and Working in Niagara?..... **13**
- Section 3: What are the Occupations in which Niagara’s Residents are Engaged?... **16**
- Section 4: Measures of Available Labour Supply..... **25**
- Section 5: Employer Challenges and Opportunities in 2020..... **30**
- Action Plan ..... **40**



## MESSAGE FROM THE CEO

Niagara Workforce Planning Board (NWPB) prepared this year's annual labour market report, as well as our [Spring 2020 labour market update](#), amid historic employment and labour force disruptions resulting from the COVID-19 pandemic. This is in contrast to the end of 2019, when Niagara's unemployment rate was at its lowest in decades, and employment opportunities were readily available across most employment sectors.

Within the first three months of 2020, Niagara's monthly unemployment rate shattered past records. Entire sectors of the economy were shuttered during lockdowns. When they opened, they struggled to reach pre-pandemic levels of employment during the summer months. As we release this report at the beginning of 2021, it is clear that there are more disruptions to come before life returns to anything that begins to resemble a pre-pandemic trend.

At a time when employment and training needs can change on a day-to-day basis, the need for data that can inform decision makers and stakeholders has never been more essential. This report attempts to offer the context on where Niagara was before the pandemic, while also capturing the impacts of COVID-19 on the workforce and employers. This report is best seen as part of an ongoing conversation that NWPB has been working to facilitate since the start of the pandemic.

In addition to the insights provided in this report, NWPB has sought to provide our community with relevant data across all of our project work. Through collaborative partnerships we have been able to engage with businesses and business organizations, educational institutions, regional and municipal governments, colleagues within the employment services and literacy and basic skills networks, and directly with the individuals that make up Niagara's workforce.

In total, our work in 2020 highlights not only the impacts of COVID-19 on local business sectors and the workforce, but also identifies pre-existing challenges that were in some cases exacerbated by the pandemic. Many of these briefings and updates were shared on our website ([nwpb.ca](#)) and through social media channels on [Twitter](#), [LinkedIn](#), & [Instagram](#).

I encourage readers of this report to explore these and other resources on our website 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 as our economy re-emerges in 2021 and beyond. We look forward to working with you.

**Vivian Kinnaird, CEO**  
**Niagara Workforce Planning Board**

# ABOUT NWPB

Niagara Workforce Planning Board (NWPB) is one of 26 regional 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

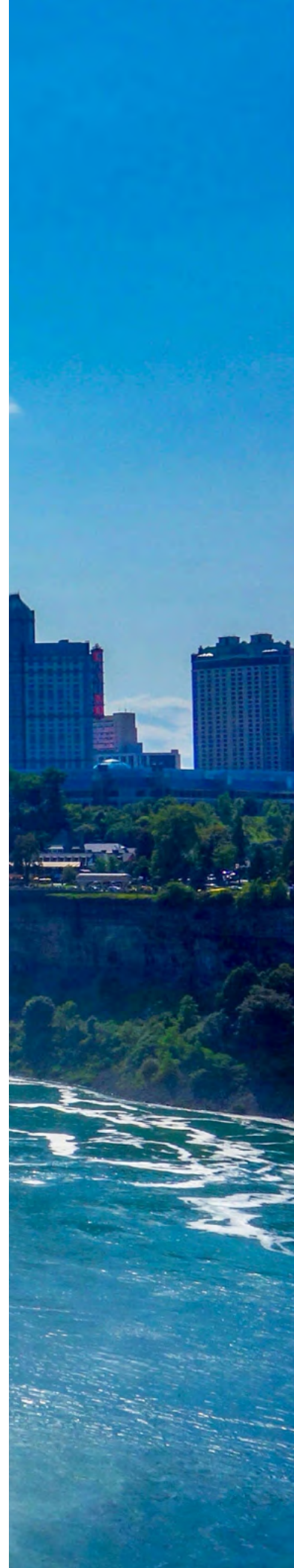
We support our local community organizations by:

- Bringing objective, accurate, and future-focused workforce research to enhance planning and decision making;
- 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*

**This project is funded in part by** the Government of Canada and the Government of Ontario. The views expressed in this document do not necessarily reflect those of the Government of Ontario.



## OUR BOARD OF DIRECTORS

**Matthew Leask** (Chair)  
**Justin De Caire** (Vice Chair)  
**Karen Watt** (Secretary)  
**Ted Barnes** (Treasurer)  
**Carol Nagy** (Past Chair)  
**Mark Cherney**

**Colleen Falco**  
**Steven Gallagher**  
**Katerina Gonzalez**  
**Jennifer Guarasci**  
**Betty-Lou Souter**

## OUR STAFF

**Vivian Kinnaird**  
Chief Executive Officer  
905.641.0801 x127

**Lisa Cairns**  
Business Administration Manager  
905.641.0801 x121

**Adam Durrant**  
Project Manager  
905.641.0801 x131

**Thalia Semplonius**  
Project Manager  
905.641.0801 x124

**Josie Faccini**  
Mentorship Coordinator  
905.641.0801 x126

**Kevin McPhillips**  
Research Associate  
905.641.0801 x150

**Nikki Prudden**  
Marketing & Communications  
Coordinator  
905.641.0801 x125

## CONTACT US

**Address:**  
3550 Schmon Pkwy, Unit 1B, 2nd Floor  
Thorold, Ontario, L2V 4Y6  
**Phone:** 905.641.0801

**Email:** [info@nwpb.ca](mailto:info@nwpb.ca)  
**Web:** [nwpb.ca](http://nwpb.ca)  
**Twitter:** @NWPB

## EXECUTIVE SUMMARY

As of June 2020, there were approximately 13,050 businesses with employees (including not-for-profit businesses and registered charities) operating in the Niagara region. Approximately 49.5% of these businesses employed four or fewer people, and 70.2% employed nine or fewer people. Though historical data suggests an increase in the number of employers between June 2017 and June 2020, a survey of local employers conducted in June 2020 suggests that slightly more than one-third of local employers were either vulnerable to closure or at risk of permanent closure due to COVID-19.

This same survey also suggested that Niagara's employers were operating at an average of 60.6% of their overall operating capacity. Some sectors, such as *wholesale trade*, were operating well above this average. Others, such as *arts, entertainment and recreation*, were operating well below. When employers were asked to identify specific barriers to their recovery, the most common response was a slow return of customers, and the need for a steady cash flow. Hiring and training, which were previously at the forefront of workforce development conversations, were less of a priority at the time of this survey.

In terms of the employer-identified needs emerging out of 2020, COVID-19 has introduced new conversations on business longevity and succession amid physical distancing and other requirements to prevent the spread of the pandemic. As local employers adjusted to the realities of operating under COVID-19, Niagara saw increases to local labour supply occurring alongside considerable exits from the local labour market. This has created a challenging situation where there are a record number of job seekers (e.g. in May of 2020, there were 25,100 active job seekers in Niagara, compared to 12,400 only three months prior) while the challenges of COVID-19 are simultaneously creating hiring difficulties for employers.



Pre-pandemic employment data shows that the jobs most commonly found in Niagara are concentrated in a number of occupations that are at risk of disruption from COVID-19. These occupations include: *retail salespersons, food counter attendants, cashiers, nurse aides, light duty cleaners, and cooks*. Most of these jobs can be categorized as *sales and service occupations*. In February of 2020, Niagara had 62,500 people employed in *sales and service occupations*. By May 2020, this figure had fallen to 48,800, only to rebound to 55,100 by October 2020. Even as the last quarter of 2020 reported some employment gains, the provincial lockdown initiated in December 2020 could see a return to Q2 2020 employment declines and commensurate labour force disruption.

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 service, manufacturing, retail trade, administrative support services, and construction*. Slightly more than one in four Employment Services clients have completed post-secondary training at the college level. As COVID-19 makes hiring and job seeking a more difficult prospect for both employers and job-seekers, local Employment Services providers continue to operate on the front lines of serving both groups.

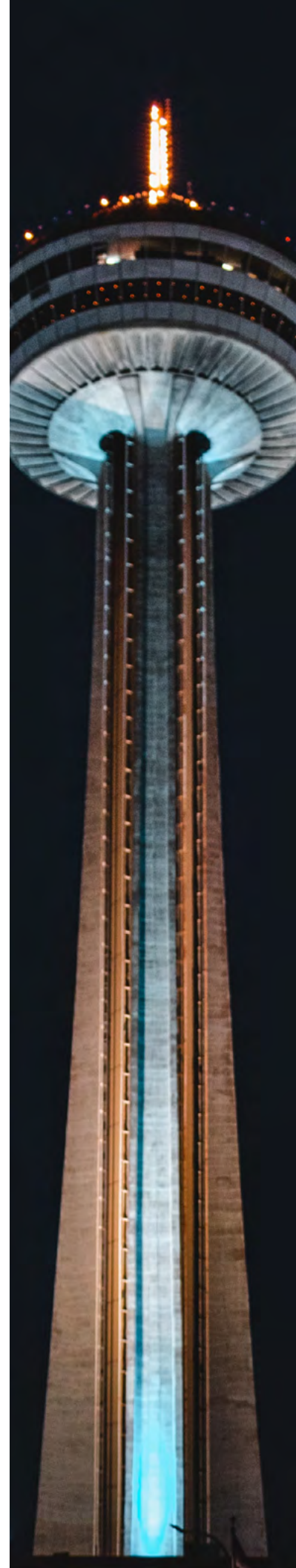
Recognizing that population trends are an essential component of measuring local labour supply, this report finds that between 2015 and 2019, Niagara's population increased by 5.5%. As of 2019, Niagara was home to an estimated 479,183 people. Five-year population migration data shows that between 2013-2018, Niagara gained 19,800 new residents. While these figures are somewhat dated, they are consistent with historic trends. NWPB anticipates conducting a deeper investigation of population migration in our 2021 labour market report.

# SECTION 1: WHAT INDUSTRIES ARE IN NIAGARA?

NWPB uses the Canadian Business Counts database to offer insights on the number of employers in Niagara, their respective industries, the size of establishments within a given industry, and the number of zero-employee firms within an industry. These data help us better understand what industries are most prominent in Niagara and where jobs can be found in our community. The nature of these data do not allow us to infer employer/industry losses due to COVID-19. Our detailed insights on how businesses were impacted by COVID-19 can be seen in Section 5 of this report.

Table 1-1 compares the number of businesses in 2017 to those present in 2020 by the number of employees. Over that period, Niagara's business count – which reflects all employers including not-for-profits, for-profits, and registered charities – grew by 7% and the number of zero-employee businesses grew by 9.1%.

Of note, micro-businesses (i.e. those establishments employing between 1-4 employees) represented approximately 49.5% of all businesses with employees in 2020. In 2017, micro-businesses only represented 47.8% of all employers. Though this segment of employers did not report the most proportional growth, it did see the largest absolute growth, adding 633 employers between 2017 and 2020.





**TABLE 1-1: CHANGE IN NUMBER OF EMPLOYERS BY BUSINESS SIZE, NIAGARA 2017 – 2020<sup>1</sup>**

Employer Size	2017	2020	Total Change	% Change
1-4 employees	5,832	6,465	633	10.9%
5-9 employees	2,703	2,695	-8	-0.3%
10-19 employees	1,741	1,818	77	4.4%
20-49 employees	1,260	1,281	21	1.7%
50-99 employees	396	505	109	27.5%
100-199 employees	178	185	7	3.9%
200-499 employees	64	73	9	14.1%
500+ employees	21	28	7	33.3%
Total, with employees	12,195	13,050	855	7.0%
Zero-Employee Firms	22,788	24,868	2,080	9.1%

Table 1-2 adds further clarity to the prominence of small businesses within the local economy. Note that a business is still considered small even if it employs 99 individuals.

**TABLE 1-2: NUMBER OF BUSINESSES WITH EMPLOYEES BY BUSINESS SIZE, NIAGARA 2017 – 2020<sup>2</sup>**

Employer Size	June 2017	% of Total	June 2020	% of Total
Micro (1-4 employees)	5,832	47.8%	6,465	49.5%
Small (5-99 employees)	6,100	50.0%	6,299	48.3%
Medium (100-499 employees)	242	2.0%	258	2.0%
Large (500+ employees)	21	0.2%	28	0.2%

1 Canadian Business Counts, June 2020 and June 2017, Niagara Census Division, excluding unclassified industries.

2 Ibid.

Only 0.2% of local employers employed more than 500 employees, and approximately 2.0% of businesses employed between 100 and 499 people. This is contrasted with a total of 12,764 micro and small businesses, which represented 97.8% of Niagara’s employers.

Given the importance of micro-employers to Niagara, NWPB collaborated with our partners in regional and municipal government to better understand the impact of COVID-19 on Niagara’s employers. Though section 5 offers comprehensive data on the impact of COVID-19 on local employers, Table 1-3 notes that slightly more than 40% of Niagara’s micro-businesses reported they were either vulnerable to closure or at risk of imminent permanent closure due to the impact of COVID-19.

**TABLE 1-3: BUSINESS SITUATION OF MICRO-BUSINESSES IN NIAGARA AMID COVID-19<sup>3</sup>**

<b>Niagara Businesses (Micro Businesses 1-4 Employees)</b>	
<b>Business Situation (June 2020)</b>	<b>% of Responses</b>
Doing well	3.5%
Stable	15.4%
Sustaining	40.5%
Vulnerable to closure	31.1%
At risk of imminent permanent closure	9.5%
<b>Total</b>	<b>100.0%</b>

The Canadian Business Counts also provide insight on specific industries in Niagara. Tables 1-4 and 1-5 show the top ten industries of operations for micro-businesses and small-to-medium enterprises, respectively.

<sup>3</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2. NWPB graciously acknowledges the collaboration of all Niagara’s municipalities on the creation of this data.

Table 1-4 offers a profile of the top industry representation among micro-businesses in 2017 and 2020. In 2020, the sectors with the most micro-business employers were *professional, scientific and technical services* (744 employers), *specialty trade contractors* (718 employers), and *ambulatory health care services* (648 employers). Niagara saw an increase in employers in all of these sectors between 2017 to 2020. Note that among the top 10 SME subsectors, only *repair and maintenance* saw a decline in the number of operations. Taken as a whole, the top-ten micro-businesses by sub-sector represented 64.6% of all micro-businesses (excluding unclassified micro-businesses) in Niagara in 2020.

**TABLE 1-4: TOP TEN INDUSTRIES BY MICRO-BUSINESS COUNTS AT A THREE-DIGIT NAICS LEVEL, NIAGARA, 2017 – 2020<sup>4</sup>**

Industry (3-digit NAICS)	2017	2020	Absolute Change	% Change
541 - Professional, scientific and technical services	685	744	59	8.6%
238 - Specialty trade contractors	617	718	101	16.4%
621 - Ambulatory health care services	602	648	46	7.6%
531 - Real estate	282	455	173	61.3%
561 - Administrative and support services	258	305	47	18.2%
813 - Religious, grant-making, civic, and professional and similar organizations	287	292	5	1.7%
236 - Construction of buildings	246	282	36	14.6%
484 - Truck transportation	203	261	58	28.6%
811 - Repair and maintenance	260	259	-1	-0.4%
722 - Food services and drinking places	199	212	13	6.5%
<b>Total</b>	<b>3,639</b>	<b>4,176</b>	<b>537</b>	<b>14.8%</b>

<sup>4</sup> Canadian Business Counts, June 2020 and June 2017, Niagara Census Division, excluding unclassified industries.

Table 1-5 outlines the top industry representation among Niagara’s small-to-medium enterprises (1-499 employees). These data show that *specialty trade contractors* (1,197 employers) were the largest industry for SMEs in Niagara followed by *professional, scientific and technical services* (1,049 employers), and *ambulatory health care services* (1,013 employers).

**TABLE 1-5: TOP TEN INDUSTRIES BY NUMBER OF SMALL-TO-MEDIUM ENTERPRISES, NIAGARA 2017 – 2020<sup>5</sup>**

Industry	2017	2020	Total Change	% Change
238 - Specialty trade contractors	1,077	1,197	120	11.1%
541 - Professional, scientific and technical services	963	1,049	86	8.9%
621 - Ambulatory health care services	935	1,013	78	8.3%
722 - Food services and drinking places	1,005	1,010	5	0.5%
561 - Administrative and support services	513	578	65	12.7%
531 - Real estate	376	546	170	45.2%
236 - Construction of buildings	398	456	58	14.6%
813 - Religious, grant-making, civic, and professional and similar organizations	447	446	-1	-0.2%
811 - Repair and maintenance	413	414	1	0.2%
445 - Food and beverage stores	377	361	-16	-4.2%

One challenge with these data is that the methodology driving the Canadian Business Counts was not designed with a pandemic in mind. Under optimal conditions, there can be a significant time lag between a business closing and their being removed from the business counts. As such, these data should be seen as a historical context.

With this in mind, NWPB will continue our partnership with the Regional Municipality of Niagara, and work in support of the annual Niagara Employer Inventory. This tool may allow for more meaningful insights on the impacts of COVID-19 on local employers of all sizes in the years to come.

<sup>5</sup> Canadian Business Counts, June 2020 and June 2017, Niagara Census Division, excluding unclassified industries.

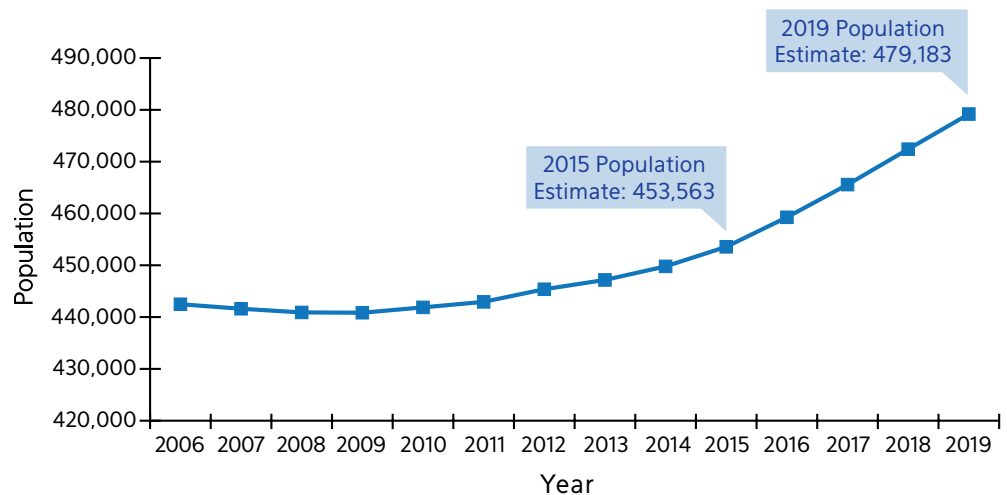


## SECTION 2: WHO IS LIVING AND WORKING IN NIAGARA?

Population data offer an important context for who lives and works in Niagara and how those demographics have changed over time. This information helps our labour market report place employment data within the context of Niagara's general population trends.

Figure 2-1 shows Niagara's historical population estimates between 2006 and 2019<sup>6</sup>. In 2019, Niagara's population was an estimated 479,183 residents. Niagara has seen consistent population growth over the past decade, following a slight population decrease between 2006 and 2009. Between 2015 and 2019, Niagara's population increased by approximately 25,620 people, a 5.6% increase over the five-year period. This is a considerable population increase following years of overall population stability.

**FIGURE 2-1: CURRENT AND HISTORICAL POPULATION ESTIMATES FOR THE NIAGARA REGION<sup>7</sup>**

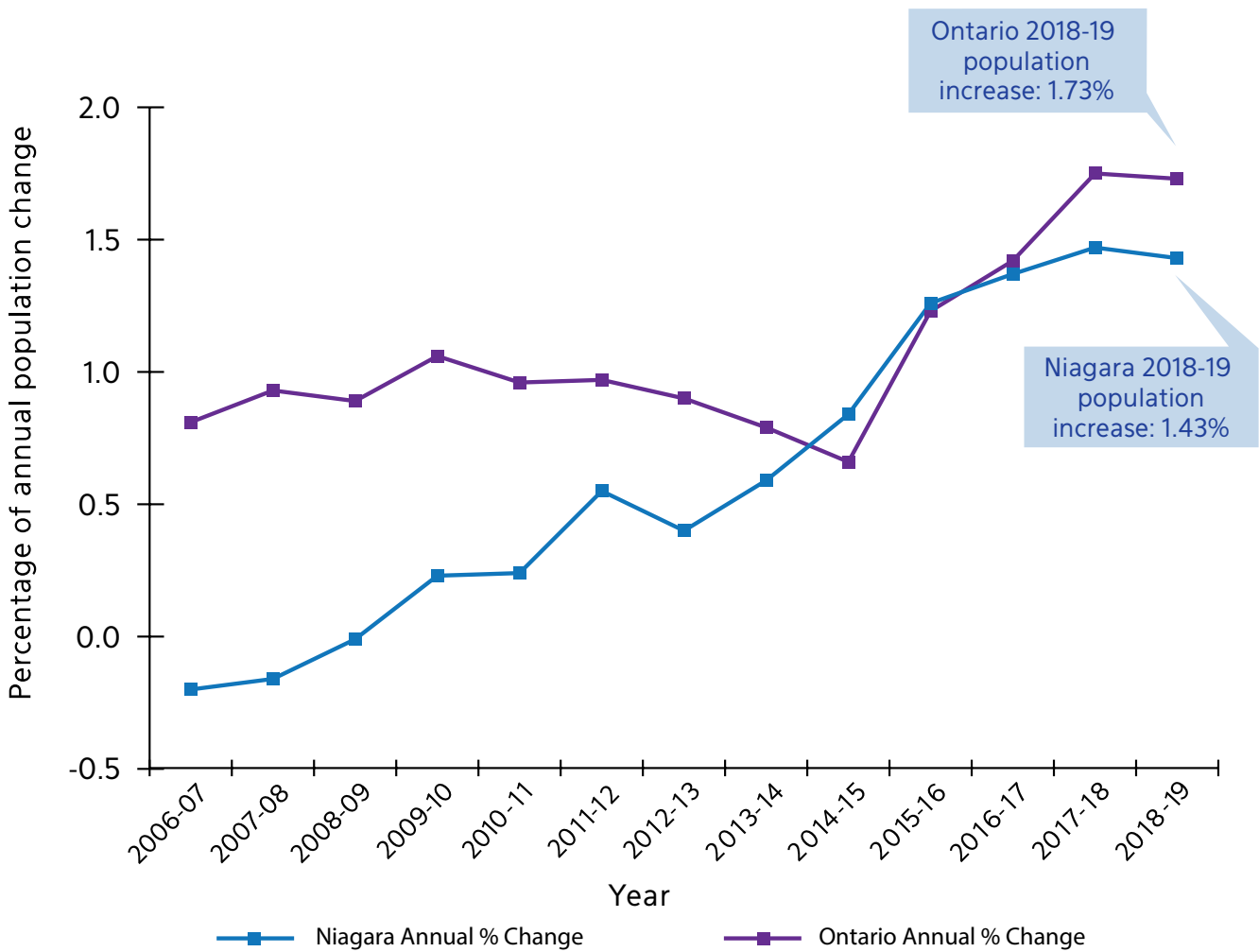


<sup>6</sup> Previous versions of this Labour Market Report presented historical data from 2001 to the present. Statistics Canada recently updated their estimates, reflecting the most up-to-date data, which no longer include population estimates prior to 2006. Thus, our data now track the population estimate from 2006 to 2019.

<sup>7</sup> Statistics Canada. Table 17-10-0139-01 Population estimates, July 1, by census division, 2016 boundaries.

To give some additional context to the recent population increase, Figure 2-2 compares Niagara’s annual rate of population change to Ontario’s rate of change. This figure indicates that Niagara’s population growth trailed provincial rates until 2014-15. Since then, Niagara’s growth rate has been more closely aligned with provincial trends.

**FIGURE 2-2: ANNUAL RATE OF POPULATION CHANGE, NIAGARA – ONTARIO, 2006 – 2019<sup>8</sup>**



<sup>8</sup> Statistics Canada. Table 17-10-0139-01 Population estimates, July 1, by census division, 2016 boundaries).

One of the most significant factors affecting population change is population migration. Table 2-3 highlights Niagara’s population migration across two five-year cohorts. In this table, an in-migrant is defined as someone who permanently moves into the Niagara region, regardless of where they previously lived. An out-migrant is someone who permanently leaves the region to live elsewhere. Net-migrants represent the difference between in-migrants and out-migrants.

**TABLE 2-3: POPULATION MIGRATION CHARACTERISTICS, NIAGARA 2012 – 2017, 2013 – 2018<sup>9</sup>**

Age Group	2012-2017			2013-2018		
	In-migrants	Out-migrants	Net migrants	In-migrants	Out-migrants	Net migrants
<b>0-17</b>	11,988	8,009	3,979	12,418	7,942	4,476
<b>18-24</b>	8,847	8,616	231	9,230	8,484	746
<b>25-44</b>	22,713	20,318	2,395	24,327	20,506	3,821
<b>45-64</b>	16,275	9,108	7,167	17,050	9,419	7,631
<b>65+</b>	8,252	5,350	2,902	8,731	5,605	3,126
<b>Total</b>	<b>68,075</b>	<b>51,401</b>	<b>16,674</b>	<b>71,756</b>	<b>51,956</b>	<b>19,800</b>

Among the 2013-2018 migration cohort, 10,757 (or 54.3%) of Niagara’s 19,800 net-migrants were aged 45 years or older. This is a slight increase from the number of net-migrants aged 45 and older in the 2012-2017 cohort. However, in 2012-17 cohort, migrants over the age of 45 represented 60.4% of net-migrants compared to 54.3% in the 2013-18 cohort. In contrast, individuals between the ages of 18 and 44 represented 4,567 net-migrants, or 23.1% of the total net-migrants in the 2013-18 cohort, which is a considerable gain over the 2012-17 cohort. Therein, 2,626 net-migrants were aged 18-44, representing 15.7% of total migration.

It remains to be seen how COVID-19 will impact migration into the Niagara region. NWPB anticipates engaging in more detailed research into these trends in 2021.

<sup>9</sup> Statistics Canada, Taxfiler, 2012-17 dataset and 2013-18 dataset.

## SECTION 3: WHAT ARE THE OCCUPATIONS IN WHICH NIAGARA'S RESIDENTS ARE ENGAGED?

This section moves beyond the demographic data from the previous section to assess the kinds of work that those employed within Niagara are undertaking. Understanding which occupations are prevalent in Niagara is important when contextualizing the state of Niagara's labour market.

Table 3-1 provides insights into the types of jobs in the Niagara region. These jobs are provided at a 1-digit National Occupation Classification (NOC) level, the broadest occupation category available. Between 2015 and 2019, *sales and service occupations* saw the most absolute growth with an increase of 3,640 jobs. However, *occupations in art, culture, recreation, and sport* had the highest growth percentage (19.4%) followed by *health occupations* (18.5%). The only job decreases were seen in *management occupations*, with a decline of 380 jobs, and *occupations in manufacturing and utilities*, with a decline of 101 jobs.





**TABLE 3-1: JOB COUNTS BY 1-DIGIT NOC,  
NIAGARA, 2015 – 2019<sup>10</sup>**

Occupation (1-Digit NOC Classification)	2015	2019	2015 - 2019 Change	2015 - 2019 % Change
Sales and service occupations	56,976	60,616	3,640	6.4%
Business, finance and administration occupations	25,590	26,625	1,035	4.0%
Trades, transport and equipment operators and related occupations	23,278	24,476	1,198	5.1%
Occupations in education, law and social, community and government services	18,346	19,888	1,542	8.4%
Health occupations	11,244	13,328	2,084	18.5%
Management occupations	12,117	11,737	-380	-3.1%
Occupations in manufacturing and utilities	9,884	9,783	-101	-1.0%
Natural and applied sciences and related occupations	8,089	9,121	1,032	12.8%
Natural resources, agriculture and related production occupations	3,893	4,388	495	12.7%
Occupations in art, culture, recreation and sport	3,244	3,873	629	19.4%
Unclassified	2,724	3,540	816	30.0%
<b>Total</b>	<b>175,385</b>	<b>187,377</b>	<b>11,992</b>	<b>6.8%</b>

<sup>10</sup> Source: EMSI Analyst, 2020.3.

Table 3-2 provides an additional level of detail on the most frequently occurring jobs in Niagara. These data are presented at a 4-digit NOC level, which offers the most specific level of occupational detail. The noted occupations represent at least 1.5% of all jobs in Niagara. Note that the largest job growth between 2015 and 2019 was *retail sales supervisors* (23.2%) followed by *sales and account representatives* (14.9%).

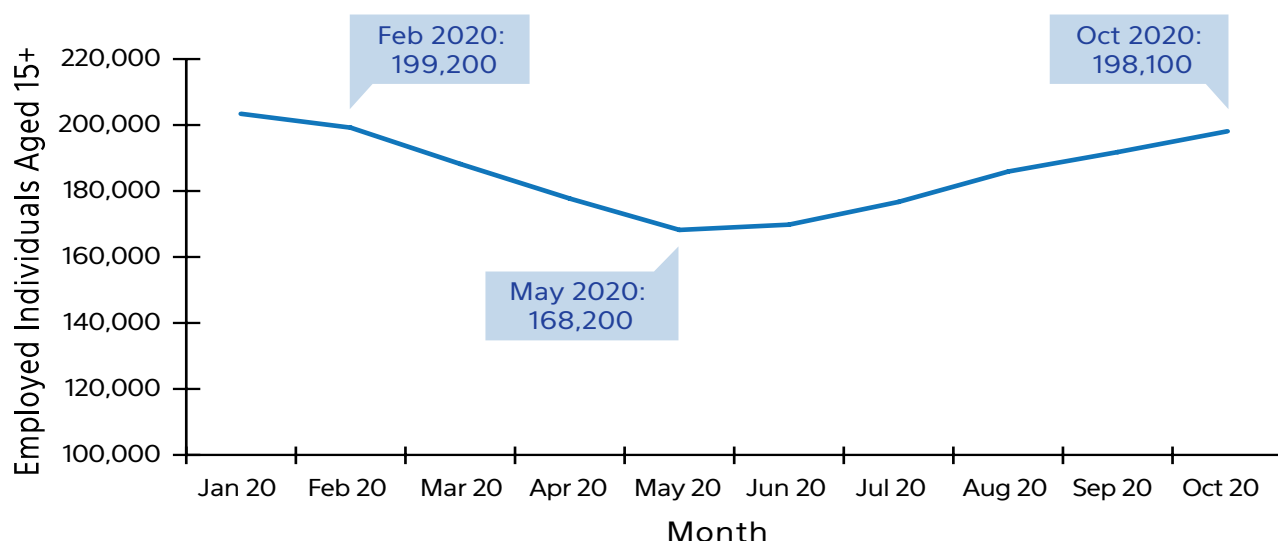
**TABLE 3-2: OCCUPATIONS ABOVE 1.5% OF ALL JOBS BY 4-DIGIT NOC, NIAGARA<sup>11</sup>**

Occupation (4-Digit NOC Classification)	2015	2019	2015 - 2019 % Change	2019 Location Quotient	2019 Median Wages
Retail salespersons	7,101	7,506	5.7%	1.15	\$30,308
Food counter attendants, kitchen helpers and related support occupations	5,668	6,329	11.7%	1.48	\$28,871
Cashiers	4,942	4,939	-0.1%	1.21	\$29,170
Nurse aides, orderlies and patient service associates	3,326	3,791	14.0%	1.23	\$42,768
Light duty cleaners	2,861	3,212	12.3%	1.51	\$29,288
Cooks	2,880	3,135	8.9%	1.36	\$29,185
Retail sales supervisors	2,503	3,084	23.2%	1.22	\$37,902
Registered nurses and registered psychiatric nurses	2,638	3,005	13.9%	0.86	\$77,116
Transport truck drivers	2,835	2,937	3.6%	1.08	\$44,464
Sales and account representatives	2,447	2,811	14.9%	1.17	\$52,820
Food and beverage servers	2,925	2,765	-5.5%	1.17	\$31,169

<sup>11</sup> EMSI Analyst, 2020.3.

While the data presented in Tables 3-1 and 3-2 provide a context for Niagara’s job counts in 2019, more recent data from the monthly Labour Force Survey provides context on how the COVID-19 pandemic affected the people who were working within those jobs. To begin, Figure 3-3 shows the extent to which COVID-19 saw overall employment reductions in Niagara. Table 3-4 provides the detailed employment metrics that reflect the last month before the pandemic, the worst month of the pandemic, and the state of Niagara’s labour market as of October 2020.

**FIGURE 3-3: MONTHLY EMPLOYMENT COUNTS IN NIAGARA<sup>12</sup>**



**TABLE 3-4: KEY LABOUR MARKET INDICATORS FOR NIAGARA<sup>13</sup>**

Indicator	Feb-20	May-20	Oct-20
Labour force	211,600	193,300	213,400
Employment	199,200	168,200	198,100
Full-time employment	152,900	132,600	149,200
Part-time employment	46,400	35,600	48,900
Unemployment	12,400	25,100	15,300
Not in labour force	148,300	167,500	148,300
Unemployment rate	5.9%	13.0%	7.2%
Participation rate	58.8%	53.6%	59.0%
Employment rate	55.3%	46.6%	54.8%

<sup>12</sup> Statistics Canada, Labour Force Survey, Table 14-10-0005-01.

<sup>13</sup> *ibid.*

Table 3-5 adds additional context by looking at the major occupations of employment for people in Niagara, and how those occupation levels changed over the months of February, May, and October of 2020.

**TABLE 3-5: OCCUPATIONAL EMPLOYMENT CHANGES IN 2020 FOR THE NIAGARA REGION<sup>14</sup>**

Occupations (1-Digit NOC Classification)	Feb-20	May-20	Oct-20	May to October Change %	May to October Change Abs. Change
Management occupations	17,100	16,100	15,800	-1.9%	-300
Business, finance and administration occupations	27,800	26,900	29,400	9.3%	2,500
Natural and applied sciences and related occupations	7,300	4,600	13,000	182.6%	8,400
Health occupations	14,700	15,700	15,600	-0.6%	-100
Occupations in education, law and social, community and government services	18,200	16,500	19,700	19.4%	3,200
Occupations in art, culture, recreation and sport	5,400	2,600	4,600	76.9%	2,000
Sales and service occupations	62,500	48,800	55,100	12.9%	6,300
Trades, transport and equipment operators and related occupations	30,700	22,700	27,800	22.5%	5,100
Natural resources, agriculture and related production occupations	6,300	6,400	4,200	-34.4%	-2,200
Occupations in manufacturing and utilities	9,300	7,700	12,800	66.2%	5,100

<sup>14</sup> Statistics Canada, Labour Force Survey, Table 14-10-0313-01.

Most sectors have shown considerable employment gains over the May to October time period. Most remarkably, *natural and applied science* occupations posted a 182.6% employment gain between May and October. However, it is important to note that employment counts measure people who live in Niagara and work in a given sector. These data do not imply that Niagara gained 8,400 jobs in the sciences. These data are inclusive of individuals being recalled to work from pandemic layoff, and would also include individuals who live in Niagara but commute, physically or digitally, to a work location outside of Niagara.

NWPB will be looking for ways to better understand how digital commuting is impacting the local workforce in the coming months. As remote work and digital commuting have been accelerated due to COVID-19, the typical data sources NWPB uses to understand commuting do not offer new insights beyond what was reported in [NWPB's 2019 labour market report](#).

It is also important to understand that employment and job counts do not always offer a complete picture of a local economy's strengths. With that in mind, Table 3-6 presents the most *concentrated* occupations in the region. To measure occupation and industry concentration, NWPB uses a measure called a **location quotient** or LQ.

A location quotient is a measure of a job's presence in the region relative to the same job's presence in the province. An LQ greater than 1.0 indicates that an occupation or industry is more heavily concentrated in a region when compared to the rest of Ontario.

Table 3-6 shows occupations with LQs above 2.5, offering a historical context between 2015 to 2019 in Niagara. This value means that occupations in this table are at least 2.5 times more concentrated in Niagara than they are in Ontario. The three occupations with the highest 2019 LQs are *casino occupations* (6.69), *tour and travel guides* (5.36), and *managers in aquaculture* (5.13).

These three occupations show areas of employment that are particularly unique to Niagara. They also illustrate that a high LQ does not always translate to an abundance of work, as seen in the seven *managers in aquaculture* jobs. Generally, the sectors in which these occupations are found emphasize two strengths in Niagara’s regional economy: tourism and agriculture.

**TABLE 3-6: OCCUPATIONS BY LOCATION QUOTIENT, NIAGARA, 2019<sup>15</sup>**

Occupation	2015 LQ	2019 LQ	2015 Jobs	2019 Jobs	2019 Median Income
Casino occupations	7.44	6.69	941	800	\$45,725
Tour and travel guides	4.24	5.36	118	105	\$35,033
Managers in aquaculture	4.45	5.13	9	7	\$53,909
Nursery and greenhouse workers	4.88	4.96	1,010	1,045	\$30,471
Accommodation service managers	3.28	4.91	256	274	\$55,623
Outdoor sport and recreational guides	3.24	4.12	30	40	\$33,496
Hotel front desk clerks	4.42	4.12	973	847	\$29,299
Managers in horticulture	3.25	3.94	63	62	\$55,193
Executive housekeepers	3.85	3.71	148	126	\$39,239
Boat and cable ferry operators and related occupations	2.66	3.28	22	26	\$49,484

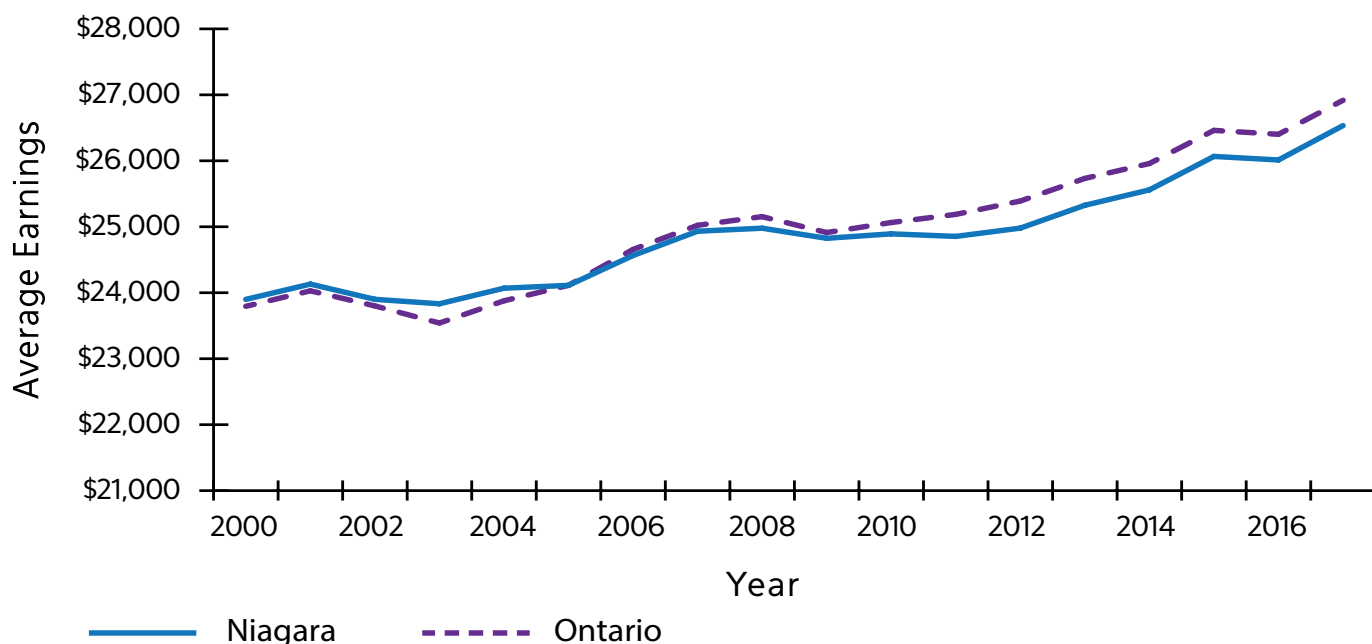
Note that the tourism economy was heavily impacted by the COVID-19 pandemic. Tourism that depends on indoor activities, which is inclusive of casino occupations – Niagara’s employment sector with the highest 2019 location quotient – continues to be severely impacted by the public health measures necessary to stop the spread of COVID-19. 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.

<sup>15</sup> EMSI Analyst, Niagara Census Division, 2020.3 dataset.

As a complement to the income data noted in Table 3-2 and Table 3-6, the final pages of this section offer some general insights on income trends in Niagara, and further contextualize those data with income data aligned to job demand observed in the third quarter of 2020.

Figure 3-7 offers a broader insight on income levels in Niagara. These data note the mean average earnings of Niagara residents, with Ontario data offered as a comparison. These data also exclude the top 10% of income earners as a means of controlling for a proportionally small number of individuals having a disproportionately large influence on the data. Additionally, these data have been inflation adjusted using 2002 dollars.

**TABLE 3-7: TAX FILER HISTORICAL INCOME DATA; BOTTOM 90% OF TAX FILERS, NIAGARA – ONTARIO, 2000 – 2017<sup>16</sup>**



In 2017, Niagara’s average annual income of \$26,533 was approximately \$400 below Ontario’s average of \$26,917. Prior to 2011, average income in Niagara was generally aligned to that observed at the provincial level. Since 2011, there has been a roughly \$400 difference between the respective mean annual incomes of Niagara and Ontario.

<sup>16</sup> Statistics Canada, Table 11-10-0055-01 High Income Tax Filers, 2000-2017.

Niagara’s measurable job demand seen during the third quarter of 2020 adds a COVID-19 relevant context on job opportunities and compensation patterns.

**TABLE 3-8: JOB DEMAND IN NIAGARA, Q3 2020<sup>17</sup>**

Occupation (4-Digit NOC Classification)	Unique Job Postings in Q3 2020	Median Hourly Income
Retail salespersons	361	\$14.57
Home support workers, housekeepers and related occupations	270	\$19.07
Cooks	259	\$14.03
Other customer and information services representatives	244	\$17.27
Food counter attendants, kitchen helpers and related support occupations	229	\$13.88
Material handlers	173	\$17.94
Janitors, caretakers and building superintendents	149	\$19.32
Transport truck drivers	133	\$21.38
Construction trades helpers and labourers	125	\$19.12
Light duty cleaners	122	\$14.08

NWPB’s *Post Pandemic Scenario Planning report* offers additional insights into job demand within the COVID-19 pandemic. As well, NWPB will be undertaking a more detailed examination of how job demand during Q3 and Q4 of 2020 aligned to a need to work in close physical proximity to other people. These insights will be forthcoming in 2021.

<sup>17</sup> Niagara Workforce Planning Board Job Demand Aggregator and EMSI Analyst, Niagara Census Division, 2020.3 dataset. Note that Analyst assumes all jobs are full-time positions. Therefore, hourly incomes below the provincial minimum wage reflect positions with a prevalence of part-time employment.





## 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. Between April 2019 and March 2020, Niagara’s Employment Services providers reported on 6,771 in-person clients. Over two-fifths 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, 2019 – 2020<sup>18</sup>**

Age	Number of Employment Services Clients	Percentage of Employment Services Clients
15-24	1,552	22.9%
25-44	2,896	42.8%
45-64	2,162	31.9%
65 and older	161	2.4%

<sup>18</sup> Employment Ontario Case Management System, 2019-2020, Niagara Region.

Table 4-2 shows the top ten industries where ES clients found their most recent employment experience. The most common industries in which clients previously worked were *accommodation and food service* and *manufacturing*.

**TABLE 4-2: TOP 10 INDUSTRIES AT TIME OF LAYOFF FOR NIAGARA ES CLIENTS, 2019 – 2020<sup>19</sup>**

Industry	Client Count
Accommodation and Food Services	731
Manufacturing	565
Retail Trade	504
Administrative and Support and Waste Management and Remediation Services	438
Construction	427
Health Care and Social Assistance	255
Transportation and Warehousing	195
Other Services (except Public Administration)	193
Arts, Entertainment, and Recreation	149
Agriculture, Forestry, Fishing and Hunting	132

<sup>19</sup> Employment Ontario Case Management System, 2019-2020, Niagara Region.

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. Once again, there was a sizeable cohort of individuals with training in the skilled trades or occupations that could lead to apprenticeship training.

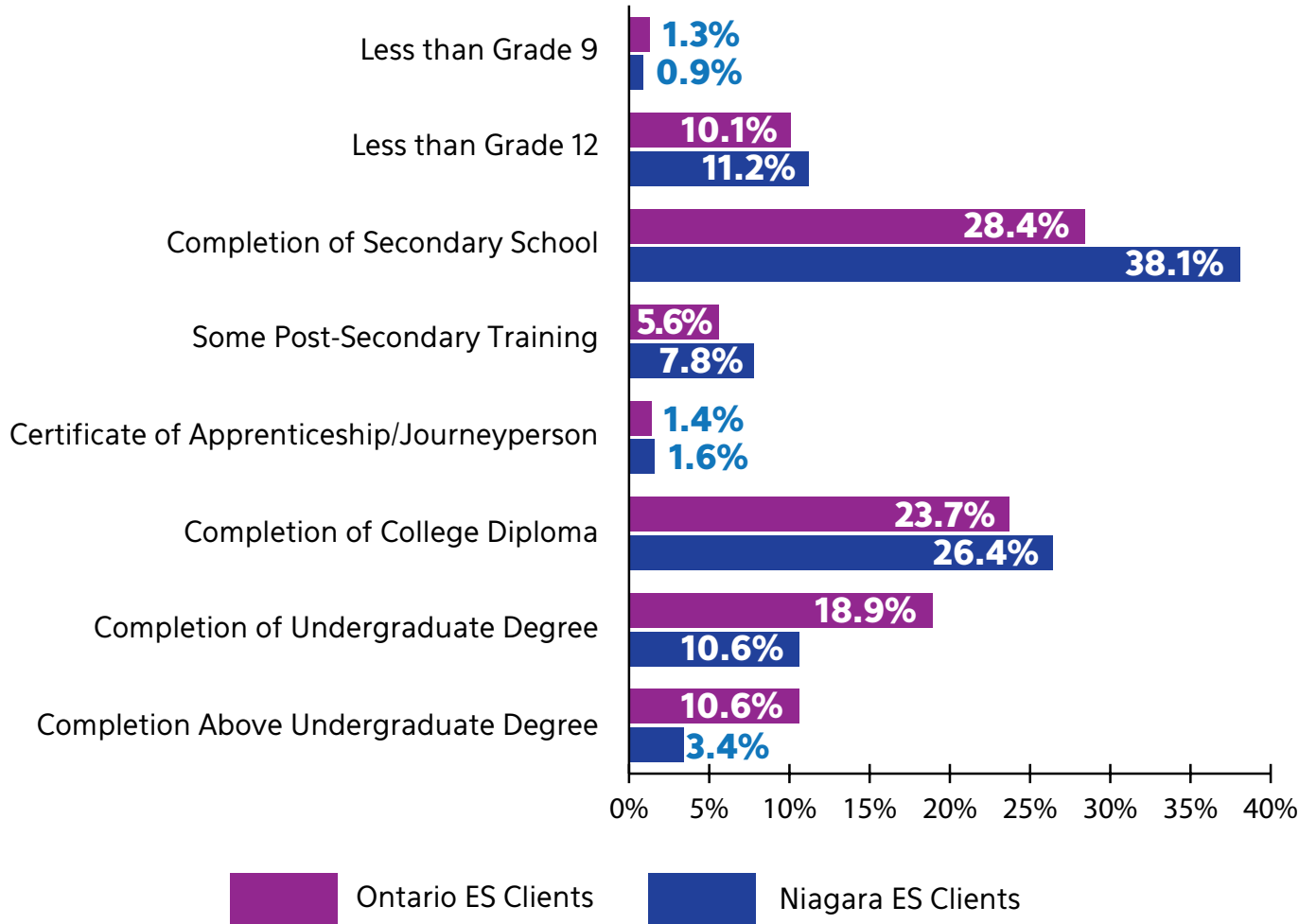
**TABLE 4-3. TOP 10 OCCUPATIONS AT TIME OF LAYOFF FOR NIAGARA ES CLIENTS, 2019 – 2020<sup>20</sup>**

<b>Occupation</b>	<b>Client Count</b>
Service support and other service occupations	453
Service representatives and other customer and personal services occupations	355
Sales support occupations	260
Trades helpers, construction labourers and related occupations	255
Labourers in Processing, Manufacturing and Utilities	249
Service supervisors and technical service occupations	239
Industrial, electrical and construction trades	229
Sales representatives and salespersons - wholesale and retail trade	213
Transport and heavy equipment operation and related maintenance occupations	181
Administrative and financial supervisors and administrative occupations	161

<sup>20</sup> Source: EOIS CAMS, 2019-2020.

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 are capable of offering to employers. The data note that the majority of employment services clients have completed at least secondary school (87.9% of clients) and almost 50% have completed some level of post-secondary education.

**FIGURE 4-4: EDUCATIONAL ATTAINMENT FOR ES CLIENTS IN ONTARIO AND NIAGARA, 2019 – 2020<sup>21</sup>**



<sup>21</sup> Source: EOIS CAMS, 2019-2020.

Table 4-5 shows the length of time ES clients reported they were out of employment. The largest group of ES clients (42.1%) 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. While much of this data predates the most significant impacts of COVID-19, it remains highly consistent with the historical trend for ES clients and serves as a benchmark for measuring the impact of COVID-19 on Niagara’s job seekers in our 2021 labour market report.

**TABLE 4-5: LENGTH OF TIME OUT OF EMPLOYMENT FOR ES CLIENTS, NIAGARA, 2019 – 2020<sup>22</sup>**

Length of Time Out of Employment	Count	Percentage
Less than 3 months	2,849	42.1%
3 - 6 months	855	12.6%
6 - 12 months	901	13.3%
More than 12 months	1,421	21.0%
Unknown	747	11.0%
<b>Total</b>	<b>6,773</b>	<b>100%</b>

<sup>22</sup> Source: EOIS CAMS, 2019-2020.

## SECTION 5: EMPLOYER CHALLENGES AND OPPORTUNITIES IN 2020

In the past, NWPB has used employer engagement as a means of understanding in-demand skills and gleaning insights on emerging career paths. However, the impact of COVID-19 requires a change in that approach. Data and insights from the Niagara COVID-19 Business Impact Survey demonstrate how many employers find themselves operating below their capacity and facing many emerging challenges.<sup>23</sup> As such, our analysis must expand beyond pre-pandemic discussions on in-demand skills and explore considerations of employer continuity.

It is quite likely that the following data may prove unsettling to some readers. The challenges that COVID-19 presents are greater than anything seen since the Great Depression. It is our hope that these data will provide additional insights to decision makers at all levels of government.

---

<sup>23</sup> Niagara Workforce Planning Board humbly and gratefully acknowledges the exceptional work of the Niagara Economic Rapid Response Team in delivering both iterations of the COVID-19 Business Impact Survey.



# OVERALL EMPLOYER HEALTH

The June 2020 delivery of the Niagara COVID-19 Business Impact Survey (NCBIS) saw a total of 1,382 responses from Niagara employers. For context, the June 2019 Canadian Business Counts note there were approximately 13,050 employers in Niagara. As such, this survey’s insights draw from a representative sample of Niagara’s employers.

The industry sectors most represented in this survey were: *accommodation and food service; other services*<sup>24</sup>; *retail trade; health care and social assistance; arts, entertainment and recreation; and manufacturing.*

In general, the data from this survey confirm that 2020 was a challenging year for local employers. Approximately 51% of respondents<sup>25</sup> reported that they had laid off staff since April 1, 2020. These layoffs represented 10,388 full-time employees among respondents and 7,562 part-time staff. For context, 17,950 laid off individuals is equivalent to 8.9% of Niagara’s 199,600 total employment count for 2019.<sup>26</sup>

Although the summer of 2020 saw some employment gains in Niagara, these short-term indicators must be placed within the context of overall employer health. Consequently, the NCBIS asked employers to identify their overall business situation. Among respondents<sup>27</sup>, 34.6% noted that they were either *vulnerable to closure* or *at risk of imminent permanent closure*. These data are seen in Table 5-1.

**TABLE 5-1: LOCAL BUSINESS SITUATION FOLLOWING COVID-19, ALL NCBIS RESPONDENTS<sup>28</sup>**

Business Situation (June 2020)	Respondents	Percentage
Doing well	55	5.5%
Stable	190	19.2%
Sustaining	403	40.7%
Vulnerable to closure	275	27.7%
At risk of imminent permanent closure	68	6.9%
<b>Total</b>	<b>991</b>	<b>100%</b>

24 This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products. Other services also includes providing personal care services, funeral services, laundry services and other services to individuals.

25 n=1,013 respondents to the question on layoffs.

26 Statistics Canada, Labour Force Survey, Table 14-10-0096-01.

27 n=991 respondents to the question on business situation.

28 Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2.

Among micro-businesses (i.e. those businesses with 1-4 employees) the data demonstrate an even more acute challenge. Therein, approximately 40.6% of microbusinesses who responded to the NCIBS (n=370) noted they were either *vulnerable to closure* or *at risk of imminent permanent closure*.

**TABLE 5-2: LOCAL BUSINESS SITUATION, MICRO-BUSINESS RESPONDENTS<sup>29</sup>**

Business Situation (June 2020)	Respondents	Count
Doing well	13	3.5%
Stable	57	15.4%
Sustaining	150	40.5%
Vulnerable to closure	115	31.1%
At risk of imminent permanent closure	35	9.5%
<b>Grand Total</b>	<b>370</b>	<b>100.0%</b>

Note that in both Table 5-1 and Table 5-2, the number of businesses who reported ‘sustaining’ is relatively unchanged between all respondents and micro-business. However, among micro-businesses, there are proportionally fewer employers who reported “doing well” or “being stable” compared to all employers.

Data from the June 2019 Canadian Business Counts notes that there are approximately 6,964 micro-businesses operating in Niagara.<sup>30</sup> Extrapolating the 40.5% of NCIBS micro-business respondents who reported as either vulnerable to closure or at risk of imminent closure to the entire micro-business population reflects potentially 2,820 at risk micro-businesses in Niagara.

Extrapolating the 34.6% of all employers who reported they were either vulnerable to closure or at risk of imminent closure to the region, as a whole, reflects potentially 4,719 at risk businesses in Niagara. Even amid the recent short-term employment recovery that Niagara observed during the second and third quarter of 2020, the medium- and long-term risk to Niagara’s employer base merits further research.

<sup>29</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2.  
<sup>30</sup> Canadian Business Counts, June 2019, Niagara Census Division.



## CHANGES IN EMPLOYER CAPACITY

Employers identified a number of other considerations that inform their medium- and long-term risk. In particular, precautions necessary to combat COVID-19 had a measurable impact on NCBIS respondents' overall business capacity. Survey respondents reported that they were, on average, reduced to 60.6% of their overall capacity to operate due to COVID-19 restrictions.<sup>31</sup> Moreover, these capacity reductions ranged from one industry to the next, as seen in Table 5-3.

**TABLE 5-3: AVERAGE CAPACITY TO OPERATE UNDER COVID-19 RESTRICTIONS, SELECTED INDUSTRIES<sup>32</sup>**

Industry	Average Capacity to Operate Amid COVID-19 Restrictions
Wholesale trade	86.3%
Finance and insurance	85.9%
Manufacturing	83.9%
Construction	76.8%
Agriculture	72.7%
Professional, scientific and technical services	72.3%
Transportation and warehousing	65.0%
Retail trade	57.4%
Health care and social assistance	55.8%
Other services	53.5%
Accommodation and food services	49.8%
Educational services	45.9%
Arts, entertainment and recreation	41.4%
<b>Total</b>	<b>60.6%</b>

<sup>31</sup> n=801 respondents to the question on operating capacity.

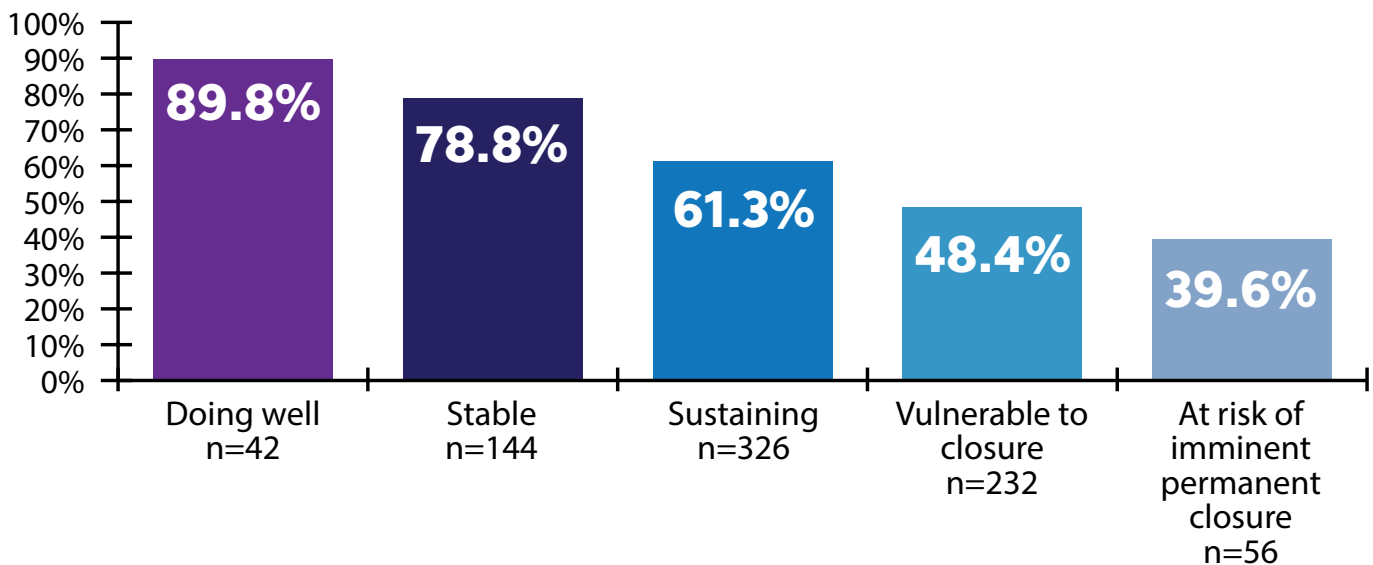
<sup>32</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2. Sectors not represented in this table due to low sample size, but included in the total: Administration services and waste management, real estate management, management of companies, mining, public administration, utilities, information and cultural industries, and business that did not identify an industry.

Industry sectors where the data reflect the highest levels of capacity amid COVID-19 restrictions are seen in *wholesale trade, finance and insurance, and manufacturing*.

Industry sectors where the data reflect significantly reduced capacity are seen in *accommodation and food service, educational services, and arts, entertainment and recreation*. These are industries where face-to-face interactions are part of a business' essential value proposition.

To add further clarity to the challenges reported in these survey data, Figure 5-4 reports on average operational capacity based on how an employer identified their overall business situation.

**FIGURE 5-4: AVERAGE BUSINESS CAPACITY BASED ON BUSINESS STATUS<sup>33</sup>**



These data suggest a strong relationship between overall business status and average operating capacity amid COVID-19 restrictions. Businesses that are doing well are also those that have been able to operate at higher levels of capacity while protecting their employees and customers from the spread of COVID-19.

<sup>33</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2. 1 employer responded to capacity but did not identify their current business situation.

How the creation of a vaccine against COVID-19 will change these figures remains to be seen. NWPB's work on a two-year Post Pandemic Scenario Planning project found that general public access to a COVID-19 vaccine would not be likely to occur until Fall of 2021.<sup>34</sup> The findings of this report also indicate two key critical uncertainties that will effect labour supply and demand in the coming two years:

- 1) changes in women's participation in the labour force
- 2) the ability of the local tourism employers to maintain operations at reduced levels of capacity

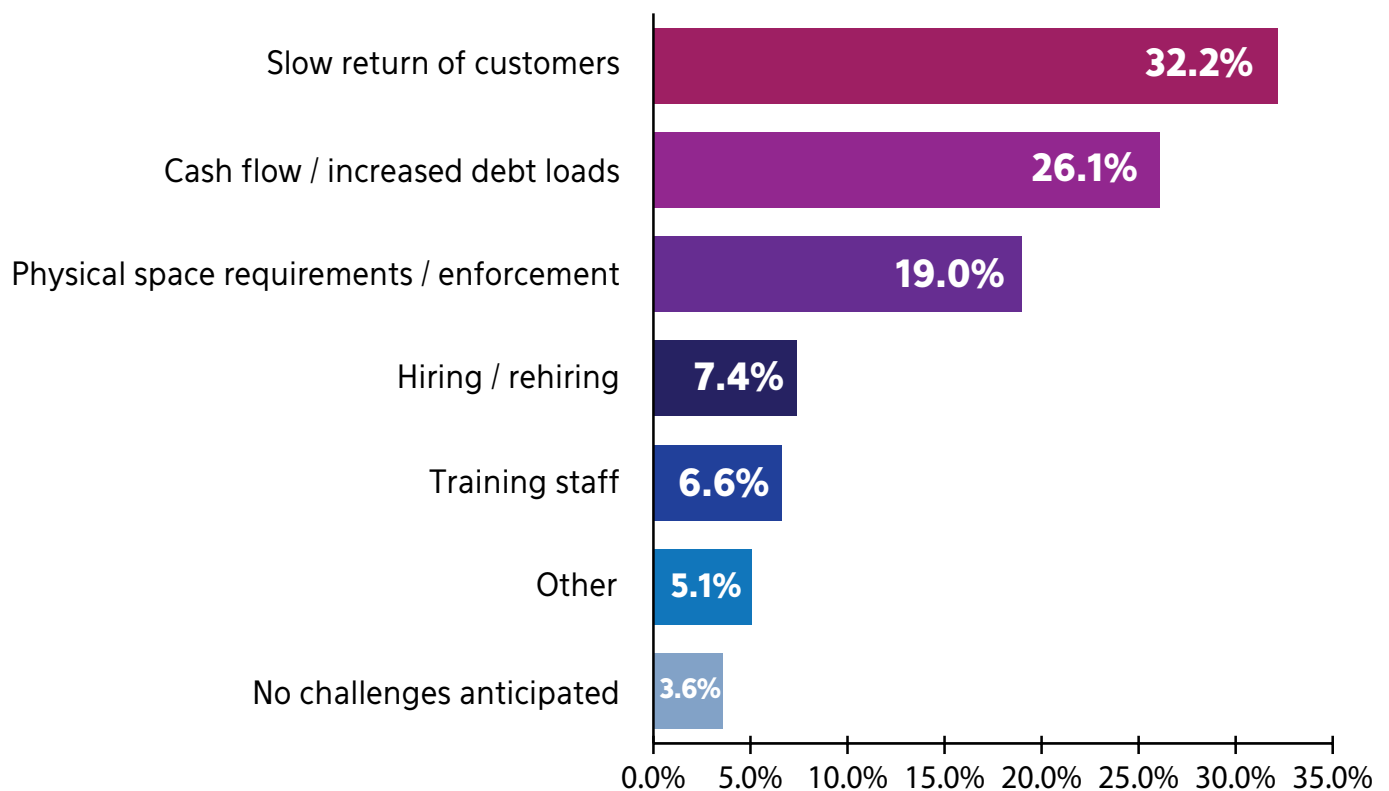
---

34 Kane, P.B., Moyer, H., MacPherson, A. et al. Expert Forecasts of COVID-19 Vaccine Development Timelines, *Journal of General Internal Medicine*, 2020.

## EMPLOYER IDENTIFIED BARRIERS TO COVID-19 RECOVERY

Niagara's long-term employment recovery will be inherently linked to the ability of local employers to recover from the impacts of COVID-19. With this challenge in mind, the NCIBS asked employers to identify their biggest barriers to recovery. Figure 5-5 presents a summary of these data. Note that respondents were allowed to identify more than one response to this question.

FIGURE 5-5: EMPLOYER IDENTIFIED BARRIERS TO RECOVERY<sup>35</sup>



<sup>35</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2.

These data reflect clear employer-identified priorities for supporting business recovery. Almost one-third of employers who responded to this question noted the slow return of customers as a barrier to recovery. These data take on a deeper context when compared to the November 2020 consumer confidence report from the Conference Board of Canada. This report noted consumer confidence stalled at an index score 74.1 in November (where a score of 100 or higher is considered to be a positive outlook).<sup>36</sup> This suggests a considerable challenge where businesses are trying to attract customers and those same customers are feeling less economic optimism, which would lead to a greater reticence to spend.

NCBIS respondents also identified cash flow/increased debt loads and physical space requirements to prevent the spread of COVID-19 as the second and third most prioritized barrier to recovery. These are priorities that speak to fundamental aspects of business continuity and longevity amid a time of economic anxiety for their customers. Table 5-6 offers additional insights on these barriers through the lens of business status.

**TABLE 5-6: EMPLOYER IDENTIFIED BARRIERS TO RECOVERY BASED ON BUSINESS SITUATION<sup>37</sup>**

Business Situation	Cash flow/ increased debt loads	Physical space requirements/ enforcement	Slow return of customers	No Challenges	All other responses
Doing well	6.0%	16.0%	14.0%	44.0%	20.0%
Stable	13.6%	23.5%	27.2%	10.7%	25.0%
Sustaining	25.2%	19.5%	34.1%	1.4%	19.8%
Vulnerable to closure	31.9%	17.6%	32.9%	0.5%	17.1%
At risk of imminent permanent closure	37.2%	14.5%	34.5%	0.7%	13.1%

<sup>36</sup> Conference Board of Canada, Index of consumer confidence: November 2020.

<sup>37</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2.

Based on the three most prominent themes identified in Figure 5-5, Table 5-6 shows that those employers who identified as being either vulnerable to closure or at risk of imminent closure were those who most frequently identified the *slow return of customers* and *cash flow* as barriers to recovery.

These data invite a broader conversation on employer support in the months and years to come. Where skills training and skills alignment was at the forefront of workforce development conversations before the pandemic, local employers did not identify hiring and workforce skills training as barriers at the forefront of their current recovery. If we consider these data as broader indicators for the region, as a whole, they may lead to reduced job opportunities and an increased competition for available employment.

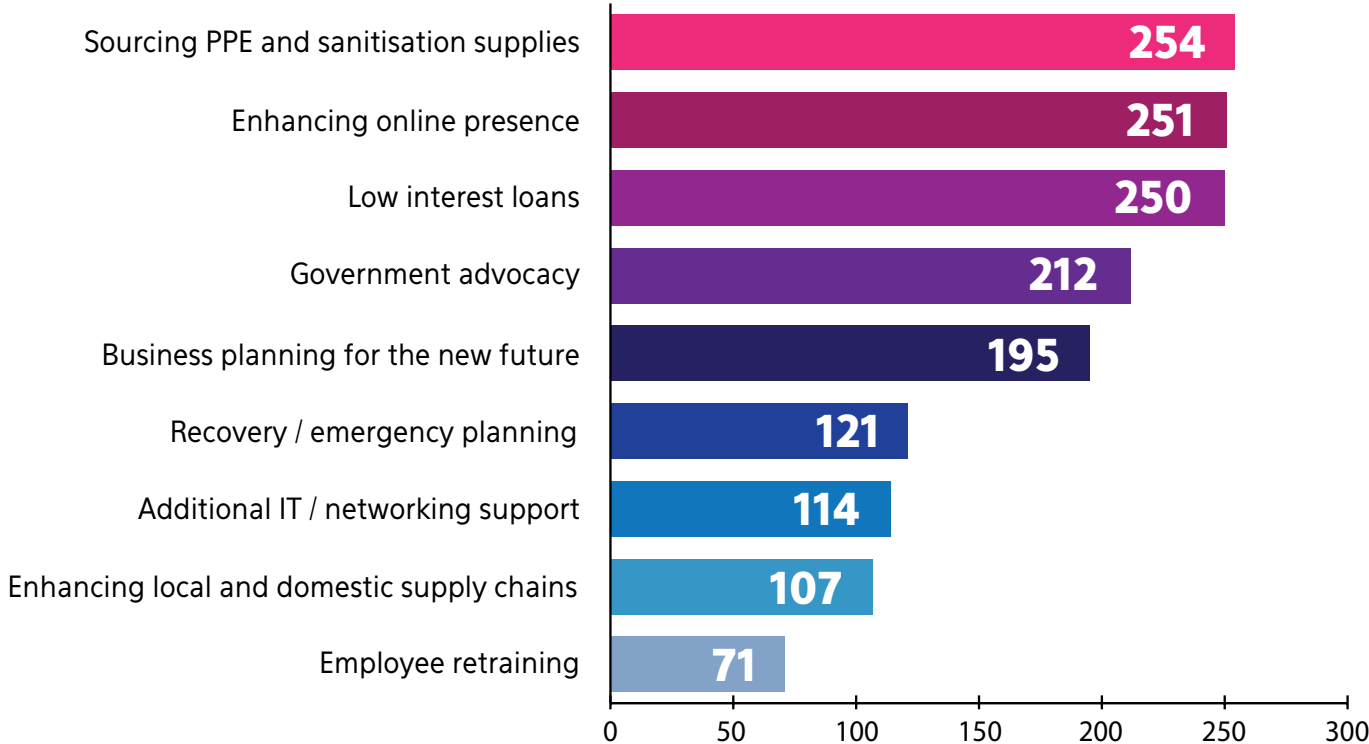
## EMPLOYER IDENTIFIED SUPPORTS TO COVID-19 RECOVERY

With barriers identified, the NCIBS asked employers to identify the specific types of assistance they required. A total of 575 employers identified at least one type of assistance they required. These employers provided a total of 1,575 responses. The most frequently identified needs included: support with enhancing online presence, low interest loans, assistance with sourcing PPE and sanitization supplies, and advocacy to provincial and federal governments.<sup>38</sup> The full list of assistance options are noted in Figure 5-7.

---

38 Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2.

**FIGURE 5-7: EMPLOYER IDENTIFIED ASSISTANCE NEEDED IN MANAGING COVID-19<sup>39</sup>**



While issues of skills training and hiring will likely present themselves in the months and years to come, loans, advocacy, PPE, and actions in support of e-commerce feature much more prominently as priorities. Among the 71 employers who did identify employee retraining as a barrier to recovery, 34 employers (47.9% of those who selected employee retraining as a barrier) were found within the “sustaining” category and 24 (33.8% of those who selected employee retraining as a barrier) were found within the “vulnerable to closure” category.

<sup>39</sup> Niagara Economic Rapid Response Team, COVID-19 Business Impact Survey Wave 2.

# ACTION PLAN

COVID-19 has demonstrated the need for flexibility and a future-focused vision in planning workforce development. With this in mind, NWPB has been on the forefront of working with stakeholders and partners in attempting to navigate the new landscape of Niagara's labour market. The changes inherent to that process invited us to set aside our pre-COVID-19 action plan, and develop something that positioned us to build on the lessons learnt in 2020.

As such, our new action plan focuses 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 2021-22 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	2021-2022 ACTIVITIES	NEAR-TO-MEDIUM FUTURE TERM PLANS BEYOND 2021-2022
<p><b>Mobilizing labour market data to support community stakeholders</b></p>	<ul style="list-style-type: none"> <li>• <b>Produce a spring interim labour market report:</b> In 2020, NWPB piloted the production of an interim spring labour market report, in addition to the production of our annual labour market report. This approach was well received by community stakeholders. As such, we will expand the scope of our annual labour market report to include the interim report along with briefing notes that will speak to regional employment trends and COVID-19 related employment trends as they arise.</li> <li>• <b>Expand public-facing job demand tools on NWPB.ca:</b> In 2020, NWPB, working in consultation with Workforce Windsor-Essex, developed a number of new tools to enhance real-time measures of job demand and labour supply in Niagara. NWPB will continue to refine these tools over the coming year as part of our commitment to delivering timely and relevant labour market research.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Seek out collaboration and partnership opportunities to promote the findings of the annual labour market report.</b></li> <li>• <b>Ensure that the annual labour market report remains relevant to emerging pressures created by the COVID-19 pandemic.</b></li> <li>• <b>Integrate regionally-focused labour force survey data on immigrant employment as it becomes available.</b></li> <li>• <b>Identify paths to broaden NWPB’s audience as data become an increasingly essential part of Niagara’s pandemic recovery.</b></li> </ul>
<ul style="list-style-type: none"> <li>• <b>Enhancing current and forecast labour market demand insights</b></li> <li>• <b>Expanding data targeted to marginalized, at-risk, and identified populations as a means of supporting stronger employment outcomes</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Continue publishing the redeveloped Eye on Employment:</b> NWPB continued to be the local voice of labour market insights in 2020-21 through publication of the monthly Eye on Employment report, frequent radio engagements, and guest speaking engagements. Our 2021-22 plan aims to build on these successes and continue to promote clear and evidence-based narratives on local labour market conditions through ongoing collaborations with the Greater Niagara Chamber of Commerce and 610AM CKTB.</li> <li>• <b>Broaden the scope of labour market insights reported in the annual labour market report:</b> Multiple projects undertaken in 2020-21 found that the impact of COVID-19 was disproportionately felt by women in Niagara. This impact necessitates ongoing monitoring and reporting of gender-based employment trends as part of our annual labour market report.</li> </ul>	

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

STRATEGY	2021-2022 ACTIVITIES	NEAR-TO-MEDIUM FUTURE TERM PLANS BEYOND 2021-2022
<ul style="list-style-type: none"> <li>• <b>Mobilizing labour market data to support community stakeholders</b></li> <li>• <b>Enhancing current and forecast labour market demand insights</b></li> <li>• <b>Expanding data targeted to marginalized, at-risk, and identified populations as a means of supporting stronger employment outcomes</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Create a tourism employment and women’s employment dashboard, to be updated monthly:</b> The findings of NWPB’s Post-Pandemic Scenario Planning project found a strong link between women’s participation in the labour force and the local tourism economy. As this sector and demographic are linked, the employment disruptions caused by COVID-19 had a strong impact on both. This impact requires ongoing observation to provide timely insights on the changing employment situation in this sector and for this demographic.</li> <li>• <b>Production of quarterly briefing notes on emerging tourism and gender-focused employment trends in Niagara:</b> The production and promotion of quarterly briefing notes on this project will ensure that NPWB is creating a steady supply of resources and insights for community stakeholders.</li> <li>• <b>Production of an annual retrospective report on how tourism and gender-based employment changed during 2021:</b> The retrospective report will summarize the findings of the quarterly briefing notes developed over 2021-22, highlighting how trends may have changed and outlining any best practices that have been identified for supporting either women’s labour market participation or employment in tourism-supporting sectors.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Leverage census data to create an authoritative pre- and post-pandemic understanding of tourism employment and women’s employment/labour force participation.</b></li> <li>• <b>Identify local initiatives that support either women’s employment/labour force participation and/or the tourism economy, providing data and insights where relevant.</b></li> <li>• <b>Maintain ongoing sectoral and demographic analysis to support a rapidly changing employment landscape during the COVID-19 recovery.</b></li> </ul>

## WORKFORCE SKILLS ALIGNMENT

STRATEGY	2021-2022 ACTIVITIES	NEAR-TO-MEDIUM FUTURE TERM PLANS BEYOND 2021-2022
<ul style="list-style-type: none"> <li>• <b>Mobilizing labour market data to support community stakeholders</b></li> <li>• <b>Enhancing current and forecast labour market demand insights</b></li> <li>• <b>Expanding data targeted to marginalized, at-risk, and identified populations as a means of supporting stronger employment outcomes</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Expand the quality control on NWPB’s job demand aggregator, leading to the production of sector-specific employment opportunity profiles:</b> NWPB’s job demand aggregator represents a bold step in providing real-time job demand data. Maintaining this project will require ongoing support for innovations and improvements. NWPB anticipates this support will also allow for the creation of tools and reports that focus on job demand in Niagara’s key employment sectors. These reports will be brought into alignment with ongoing efforts to support COVID-19 recovery through Niagara’s Economic Rapid Recovery Team’s identified priorities.</li> <li>• <b>Produce monthly and quarterly job demand reports to support local pandemic recovery and planning:</b> These activities will build on the demonstrated record of success NWPB has achieved with our Employment Prospects Series. These documents have supported local education partners in the creation of specialist high-skills majors programs, while also providing strategic insights on consistently in demand occupations in Niagara to our partners in Employment Services and Literacy and Basic Skills.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Expand self-service options for community research:</b> 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.</li> <li>• <b>Explore opportunities to build and expand meaningful definitions on in-demand skills:</b> 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.</li> </ul>

# UNDERSTANDING BARRIERS TO EMPLOYMENT

STRATEGY	2021-2022 ACTIVITIES	NEAR-TO-MEDIUM FUTURE TERM PLANS BEYOND 2021-2022
<ul style="list-style-type: none"> <li>• <b>Mobilizing labour market data to support community stakeholders</b></li> <li>• <b>Enhancing current and forecast labour market demand insights</b></li> <li>• <b>Expanding data targeted to marginalized, at-risk, and identified populations as a means of supporting stronger employment outcomes</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Develop a workforce-facing survey that explores if/how COVID-19 has created new barriers to employment:</b> COVID-19 has had drastic implications for Niagara’s workforce. The pandemic increased pressures on employers and created new expectations for employees. These changes are also likely to create new barriers to employment. We anticipate a workforce facing survey would help identify these barriers, and be a first step to providing specific insights for job seekers among equity seeking groups (e.g. recent immigrants, visible minorities, women).</li> <li>• <b>Explore the findings of this survey through employer consultations:</b> To add context to the employee survey’s findings, NWPB will conduct one-on-one engagements with employers and employer-advocacy groups including Niagara’s chambers of commerce, local downtown BIAs, and other employer support organizations.</li> <li>• <b>Ongoing collaboration and coordination with Niagara Region on data collection and analysis activities:</b> 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. We anticipate continuing this close integration of our work in 2021-22 as well as working with Niagara Region’s Planning department on the delivery of the 2021 Niagara Employer Inventory.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Leverage data from the 2021 Niagara Employer Inventory to add insights to 2021 Census data:</b> The volume of disruptions that occurred in 2020 and 2021 will likely have an impact on the data produced by the 2021 census – particularly with respect to business succession and longevity. Combining sources on a deep-dive research project will serve as a tool to help steer local pandemic recovery.</li> <li>• <b>Explore how commuter flow to and from Niagara has changed with the pandemic:</b> 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. With more than 40% of the Canadian workforce working remotely amid the pandemic, it will be incumbent on NWPB to explore the extent of the changes to these historic trends. Since commuter and migration data have a direct relationship to our available labour supply and the ability of local employers to retain a workforce, these data will provide vital insights to local stakeholders.</li> </ul>

## YOUTH EMPLOYMENT 2.0

STRATEGY	2021-2022 ACTIVITIES	NEAR-TO-MEDIUM FUTURE TERM PLANS BEYOND 2021-2022
<ul style="list-style-type: none"> <li>• <b>Mobilizing labour market data to support community stakeholders</b></li> <li>• <b>Enhancing current and forecast labour market demand insights</b></li> <li>• <b>Expanding data targeted to marginalized, at-risk, and identified populations as a means of supporting stronger employment outcomes</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Develop a report on the impact of COVID-19 on Niagara’s youth labour force:</b> 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 disruption during the pandemic, NWPB will be preparing an update on the state of youth employment amid COVID-19.</li> </ul> <p>This report will seek to capture policy insights that would support youth recovery in 2021 and beyond. Consultations with community stakeholders in post-secondary education will ensure this work is aligned to emerging needs for recent graduates and students. This work will also include the creation of a youth employment dashboard as a means of providing public-facing insights on youth employment.</p>	<ul style="list-style-type: none"> <li>• <b>Assessment of Census 2021 data as it applies to youth employment:</b> 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, paired with potential opportunities for youth employment surveys will help guide pandemic recovery while working to address pre-pandemic challenges of attracting youth to employment in the skilled trades.</li> <li>• <b>Refresh data from the 2019-20 in-demand skilled trades project:</b> Prior to the pandemic, NWPB leveraged partnerships with local employment service providers and the Niagara Industrial Association to deliver a comprehensive report on in-demand skilled trades. The findings of the Census 2021 and aforementioned youth engagement activities may necessitate refreshing 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.</li> </ul>







3550 Schmon Pkwy, Unit 1B, 2nd Floor  
Thorold, Ontario, L2V 4Y6

**Email:** [info@nwpb.ca](mailto:info@nwpb.ca) | **web:** [nwpb.ca](http://nwpb.ca)

**Phone:** 905.641.0801 |  [@NWPB](https://twitter.com/NWPB)