

# Spring 2020 Labour Market Update



**NIAGARA**  
**WORKFORCE**  
**PLANNING BOARD**



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.



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## Executive Summary

NWPB has prepared this report amid extraordinary times. Canadians are facing the daily challenges of the COVID-19 pandemic during economic conditions last seen during the Great Depression. With these challenges in mind, the goal of this report is to offer a clear accounting on the state of the local labour market in 2019 as a means of setting the context for 2020's ongoing recovery efforts. Our focus, with this and all other reports, is to ensure there is a reliable source of regional insight that will help decision makers return people to meaningful and stable work in the months to come.

Even before the pandemic, 2019 presented as a year of general employment decline. The number of employed Niagara residents fell from 201,700 in 2018 to 199,600 in 2019. This employment decline occurred alongside decreases in the number of unemployed individuals and a much larger spike in individuals who reported as not being in the labour force. Given a greater proportion of Niagara residents over the age of 65 compared to Ontario, this trend is likely driven by retirements, individuals over the age of 65 moving into Niagara, and unemployed workers giving up the search for employment. By March of 2020, which saw the beginning of the provincial and federal orders to combat COVID-19, 11,000 Niagara residents lost employment in a single month. However, the reality of this number is likely higher as local labour force data is measured with a three month floating average, which would include the pre-pandemic months of January and February.

Between 2018 and 2019, employment declines among Niagara residents were concentrated within three industry sectors: *business, building and other support services; wholesale and retail trade; and accommodation and food services*. By March of 2020, almost all industry sectors in Niagara began reporting month-over-month employment losses. Between February and March 2020, 3,000 Niagara residents in *accommodation and food services* lost employment. *Wholesale and retail trade* saw similar losses with 2,600 Niagara residents losing employment. While employment losses do not necessarily translate to job losses – particularly when sectors are temporarily shut down due to emergency orders – a regional employer survey was clear in its findings that the longer the COVID-19 pandemic continued, the more likely temporary employment losses would become permanent job losses.

The COVID-19 pandemic further illustrated some “complex” impacts on the labour market. Therein, the pandemic and emergency measures led to a surge of individuals in Ontario who were technically employed but reported zero employment hours. Among Ontario's 7,030,100 employed individuals in March 2020, 20.4% (1,433,700 people) reported being employed at zero hours. With these data in mind, there is reason to believe COVID-19 is having labour force impacts beyond basic measures of employment and unemployment.

These impacts will extend to measuring Niagara's industrial profile. The Canadian Business Counts reported 13,728 businesses (including not-for-profits and charities) operating in Niagara. More than half of those businesses employ four people or fewer. A March survey delivered by the Niagara Economic Rapid Response Team noted that 92% of surveyed businesses (n=2,461) reported losing revenue from COVID-19. These respondents further estimated that if COVID-19 restrictions persisted for a year it would lead to revenue losses of \$1,353,483,235.

Niagara's self-employment sector is also likely to face impacts from COVID-19. Among the estimated 26,829 self-employed individuals residing in Niagara, slightly less than one-third (30.4%) are employed in real estate. While these individuals no doubt benefited from a booming housing market in recent years, current forecasts from the Canada Mortgage Housing Corporation expect a considerable housing market slowdown well into 2021.

In terms of the skills and education level in the local labour force, Niagara continues to have an overall advantage over the provincial benchmark with respect to individuals who have a background in the skilled trades (7.8% of Niagara's labour force holds a completed apprenticeship certificate compared to 5.9% in Ontario). Amid the COVID-19 pandemic there has been a particular demand for individuals with a variety of skills that lend themselves to working in long-term and residential care facilities, as well as within the Niagara Health System. However, it remains to be seen what skills and educational backgrounds will emerge as particularly in demand as the local and provincial workforce recalibrates to the post-COVID world.

Overall job demand, as measured through the aggregation of online job postings, between 2018 and 2019 saw 19.3% growth, increasing from 12,375 Niagara-focused job postings in 2018 to 14,746 in 2019. The largest segment of this demand was found in *sales and service occupations* which accounted for 41.2% of all job demand. With the emergence of the COVID-19 pandemic, Niagara saw week-over-week job demand begin to decline during the week of March 15, 2020. By the week of March 22, 2020 weekly job demand had decreased by 51.5% compared to the same week in 2019.

NWPB's full 2020 Labour Market Report will be available in the Fall of 2020. In the interim, NWPB has produced a number of sector and industry-specific briefing notes to support decision makers at all level of government during the pandemic. All of these insights are available for public use at [www.niagaraworkforce.ca/COVID-19](http://www.niagaraworkforce.ca/COVID-19).

## Section 1. Who is Living and Working in Niagara?

Reviewing local population patterns provides a fundamental understanding of Niagara's maximum potential labour force. Taking into account the current context of COVID-19, understanding our local population also allows for a summary examination on the demographics of individuals who may be affected by the economic uncertainty caused by this pandemic.

Niagara has experienced population growth since 2009 (Figure 1-1), and the rate of this growth has recently increased to mirror provincial levels of population growth (Figure 1-2).

Figure 1-1. Current and Historical Population Estimates for the Niagara Region<sup>1</sup>

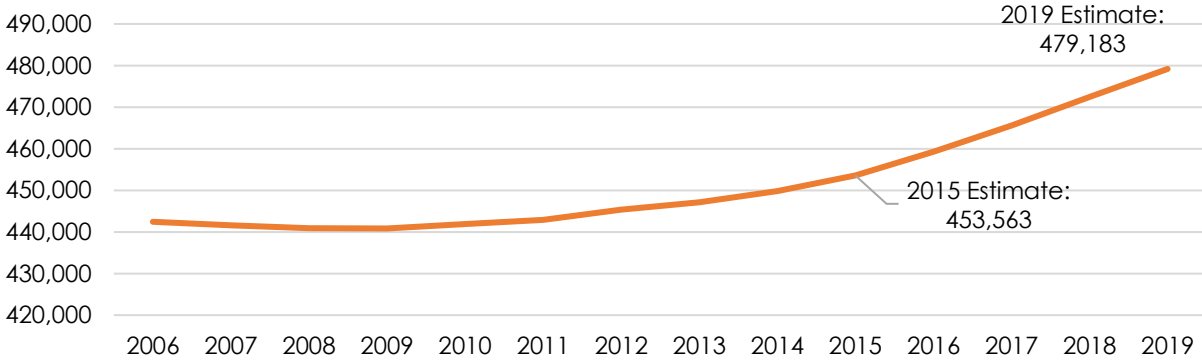
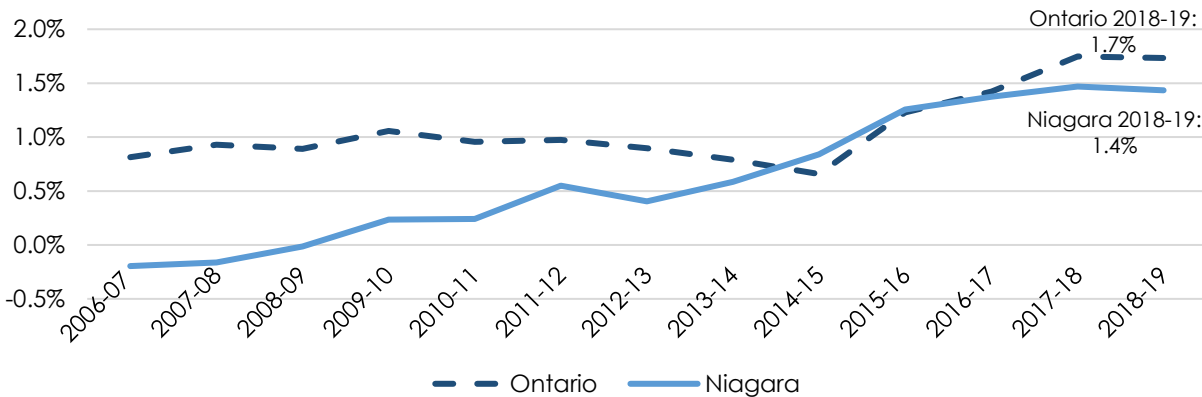


Figure 1-2. Regional and Provincial Rates of Population Growth<sup>2</sup>



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

<sup>2</sup> Ibid, calculations by NWPB

We also can examine the local population that is of “prime working age” – in other words, those aged 15 to 64. Figure 1-3 shows that just under 64% of Niagara’s population is in the “prime working age” population, compared to the provincial measure where just over 67% of the population is of prime working age.

Figure 1-3. Age Cohorts in Niagara, 2019<sup>3</sup>

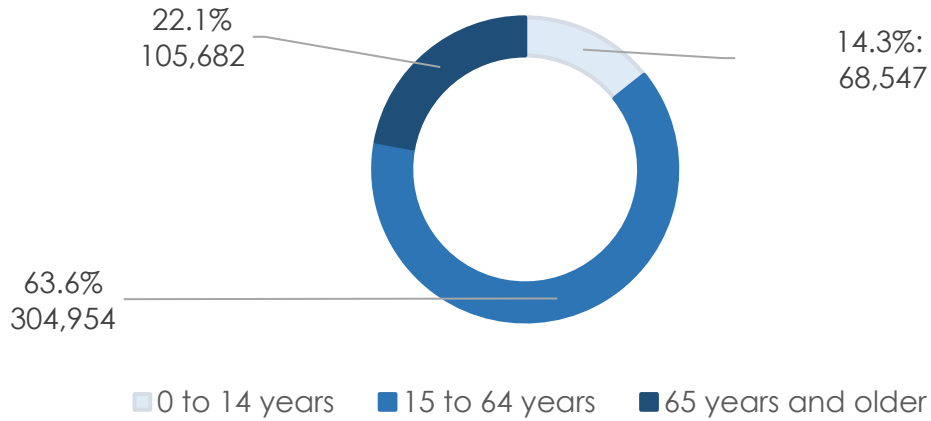
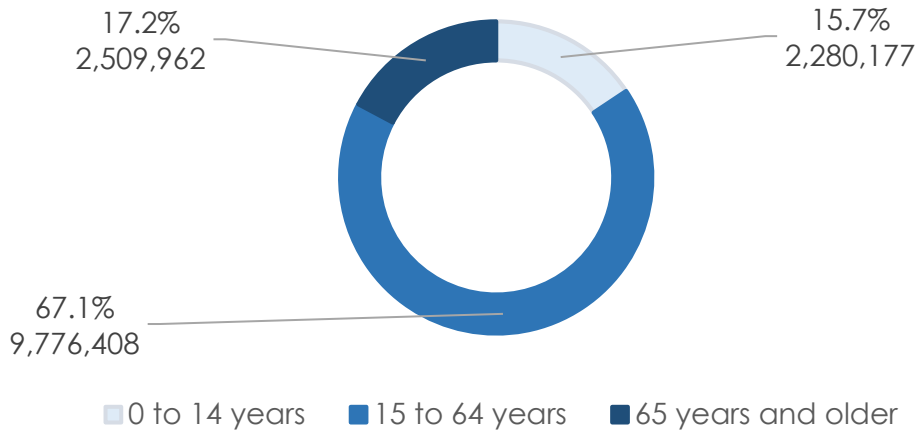


Figure 1-4. Age Cohorts in Ontario, 2019<sup>4</sup>



<sup>3</sup> Statistics Canada, Table: 17-10-0139-01, Population estimates, July 1, by census division, 2016 boundaries

<sup>4</sup> ibid

Table 1-5 shows that the St. Catharines-Niagara CMA<sup>5</sup> saw slight changes in its labour force indicators between 2018 and 2019. The decrease in labour force size and increase in people reporting they are not in the labour force likely indicates that some part of this change is driven by individuals leaving the labour force. With Figure 1-3 showing that slightly more than one out of five Niagara residents are over the age of 65, these changes are likely being influenced by retirements as well as the relocation of individuals who are not working to the Niagara region.

Table 1-5. St. Catharines-Niagara CMA Annual Key Performance Indicators<sup>6</sup>

Labour Force Indicator	2018	2019	2018-19 Change
Labour Force	215,800	211,800	-4,000
Total employment	201,700	199,600	-2,100
<i>Full-time employment</i>	153,100	154,700	1,600
<i>Part-time employment</i>	48,600	44,900	-3,700
Unemployment	14,200	12,200	-2,000
Not in labour force	136,700	145,600	8,900
Unemployment rate	6.6%	5.8%	-0.8%
Participation rate	61.2%	59.3%	-1.9%
Employment rate	57.2%	55.8%	-1.4%

**These 2019 data should be used as a baseline for the economic change that Niagara is currently experiencing due to COVID-19.** When we compare the first quarter of 2020 to 2019 as a whole, the early impacts of the COVID-19 pandemic on the local labour force become evident in March 2020.

Between February and March of 2020, approximately 11,000 Niagara residents lost employment. These employment losses were more concentrated among individuals with full-time employment; therein, 65.5% of the 11,000 people who lost employment were working full-time, and 35.5% were working in a part-time capacity. March also saw an additional 6,000 Niagara residents reporting as not in the labour force. This means that these individuals were not working nor were they looking for work. This is one of the reasons why COVID-19's shock to the employment landscape is atypical of past recessions and economic disruptions. With entire industry sectors shut down, people are leaving the workforce and not searching for any potential employment. As the impacts

<sup>5</sup> Statistics Canada's Labour Force Survey provides labour force information at a Census Metropolitan Area (CMA) level. The St. Catharines-Niagara CMA excludes Grimsby and West Lincoln due to their workforces' commuter flow patterns. Grimsby's commuter flow places it in the Hamilton CMA, and West Lincoln is defined as Non-CMA Ontario.

<sup>6</sup> Statistics Canada, Table 14-10-0096-01 Labour Force Characteristics by census metropolitan area.



of COVID-19 continue to present themselves, it is expected that participation rates will fall as unemployment rates rise.

Table 1-6. St. Catharines-Niagara CMA Monthly Key Performance Indicators<sup>7</sup>

Labour Force Indicator	2019 Annual	2020		
		Jan	Feb	Mar
Labour Force	211,800	215,100	211,600	205,900
Total employment	199,600	203,400	199,200	188,200
<i>Full-time employment</i>	<i>154,700</i>	<i>156,200</i>	<i>152,900</i>	<i>145,700</i>
<i>Part-time employment</i>	<i>44,900</i>	<i>47,200</i>	<i>46,400</i>	<i>42,500</i>
Unemployment	12,200	11,700	12,400	17,700
Not in labour force	145,600	144,500	148,300	154,300
Unemployment rate	5.8%	5.4%	5.9%	8.6%
Participation rate	59.3%	59.8%	58.8%	57.2%
Employment rate	55.8%	56.5%	55.3%	52.2%

These changes show the impact of COVID-19 and the policy changes (e.g., the shut down of non-essential businesses) that have occurred in order to address the spread of this pandemic.

<sup>7</sup> Statistics Canada, Table 14-10-0095-01 Labour Force Characteristics by census metropolitan area.

## Section 2: In What Work are Niagara Residents Engaged?

Data from Statistics Canada's Labour Force Survey allow for an examination of the occupations and industries where Niagara residents find employment. **It is essential to understand that these data are counts of employment. Gains or losses of employment should not be read as gains or losses in jobs** – job data are captured in Section 3 of this report. Table 2-1 provides an overview of annual employment data with a focus on occupation of employment.

Table 2-1: Occupation of Employment: St. Catharines-Niagara Census Metropolitan Area<sup>8</sup>

Occupation (1-digit NOC code)	2018	2019	2018-19 Change	2018-19 % Change
Sales & service	65,600	64,100	-1,500	-2.3%
Trades, transport & equipment operators and related	29,400	31,600	2,200	7.5%
Business, finance & administration	26,200	24,800	-1,400	-5.3%
Education, law & social, community & government services	18,400	17,800	-600	-3.3%
Health	16,400	16,700	300	1.8%
Management occupations	16,800	15,800	-1,000	-6.0%
Occupations in manufacturing & utilities	9,300	9,900	600	6.5%
Natural & applied sciences & related	9,200	7,400	-1,800	-19.6%
Art, culture, recreation & sport	6,000	6,500	500	8.3%
Natural resources, agriculture & related production	4,400	5,000	600	13.6%
<b>Total employed</b>	<b>201,700</b>	<b>199,600</b>	<b>-2,100</b>	<b>-1.0%</b>

As noted in Section 1, Niagara saw an overall decline in its employed population between 2018 and 2019. The largest proportional and absolute employment decline was in *natural and applied sciences* occupations. This occupation group saw a decline of 1,800 employed individuals, which accounts for a 19.6% reduction from 2018 employment levels. While there was also a decline of 1,500 people working in sales and service occupations, this annual change only reflects 2.3% of the 2018 employment figures. Gains in employment in *trades, transport and equipment operators* reflect a long-term trend of employment growth in the goods-producing sector, and a particular need for skilled trades people within the region.

<sup>8</sup> Statistics Canada, Labour Force Survey, Table 14-10-0096-01

The annual data in Table 2-1 serve as an essential context for viewing the employment trends for the first quarter of 2020, as seen in Table 2-2. March's data reflect month-over-month employment losses not seen since the 2008-09 recession. Deeper analysis of these employment data are available in NWPB's monthly Eye on Employment, which can be accessed through NWPB's COVID-19 portal – [www.niagaraworkforce.ca/COVID-19](http://www.niagaraworkforce.ca/COVID-19).

Table 2-2: Occupation of Employment - Q1, 2020: St. Catharines-Niagara Census Metropolitan Area<sup>9</sup>

Occupation (1-digit NOC code)	Jan 2020	Feb 2020	Mar 2020	Feb-Mar Change	Feb-Mar % Change
Sales & service occupations	61,800	62,500	58,600	-3,900	-6.2%
Business, finance & administration occupations	28,500	27,800	28,500	700	2.5%
Trades, transport & equipment operators and related occupations	33,800	30,700	28,100	-2,600	-8.5%
Occupations in education, law & social, community & government services	18,500	18,200	17,400	-800	-4.4%
Management occupations	16,700	17,100	15,900	-1,200	-7.0%
Health occupations	14,300	14,700	14,300	-400	-2.7%
Occupations in manufacturing & utilities	9,400	9,300	8,900	-400	-4.3%
Natural resources, agriculture & related production occupations	5,700	6,300	6,600	300	4.8%
Natural & applied sciences & related occupations	7,900	7,300	5,900	-1,400	-19.2%
Occupations in art, culture, recreation & sport	7,000	5,400	3,900	-1,500	-27.8%
<b>Total employed, all occupations</b>	<b>203,400</b>	<b>199,200</b>	<b>188,200</b>	<b>-11,000</b>	<b>-5.5%</b>

Sales and service occupations reflect the largest month-over-month employment decline, with 3,900 fewer individuals in employment in March compared to February. Proportionally, more than one quarter of individuals who were employed in *art, culture, recreation and sport* occupations in February were not working in March. *Trades, transport, and equipment operators*, which saw year-over-year employment growth between 2018 and 2019, shed 8.5% of its total employment between February and March. Over the course of three months (Jan-Mar 2020), *trades transport and equipment operators* saw a reduction of 5,700 employed individuals.

Data on the industries in which Niagara's residents find employment, as seen in Table 2-3, provide an additional insight on historic and current trends.

<sup>9</sup> Statistics Canada, Labour Force Survey, Table 14-10-0313-01

Table 2-3: Industry of Employment: St. Catharines-Niagara Census Metropolitan Area<sup>10</sup>

Industry (2-digit NAICS Code)	2018	2019	2018-19 Change	2018-19 % Change
Wholesale & retail trade	32,100	31,100	-1,000	-3.1%
Health care & social assistance	25,200	26,000	800	3.2%
Accommodation & food services	25,000	24,000	-1,000	-4.0%
Manufacturing	18,000	18,500	500	2.8%
Construction	18,200	18,300	100	0.5%
Educational services	14,300	14,200	-100	-0.7%
Information, culture & recreation	9,800	9,500	-300	-3.1%
Finance, insurance, real estate, rental & leasing	9,200	9,100	-100	-1.1%
Other services (except public administration)	8,700	9,000	300	3.4%
Business, building & other support services	11,500	8,700	-2,800	-24.3%
Public administration	7,200	8,600	1,400	19.4%
Transportation & warehousing	8,900	8,500	-400	-4.5%
Professional, scientific & technical services	7,500	8,200	700	9.3%
Agriculture	3,400	3,700	300	8.8%
<b>Total employed</b>	<b>201,700</b>	<b>199,600</b>	<b>-2,100</b>	<b>-1.0%</b>

Year-over-year industry data show that *public administration* had the largest absolute and proportional employment gain with an additional 1,400 individuals reporting employment; this represents a 19.4% increase in employment over the 2018 data. The largest 2018-2019 employment decrease was found in *business, building, and other support services*. This industry grouping includes two industry sectors: *management of companies and enterprises*, and *administrative and support, waste management and remediation services*. A detailed breakdown of *business, building, and other support services* is noted in the footnote below.<sup>11</sup>

<sup>10</sup> Statistics Canada, Labour Force Survey, Table 14-10-0098-01

<sup>11</sup> Establishments operating under *management of companies and enterprises* grouping are generally engaged in managing companies and/or the holding the securities or financial assets of companies and enterprises. Establishments operating under in the *administrative support* grouping are generally engaged in activities such as administration, hiring, document preparation, taking orders from clients, arranging travel, providing security and surveillance, cleaning buildings, and packaging products. *Waste management and remediation services* industries are generally engaged in the collection, treatment, and disposal of waste material as well as the operation of material recovery facilities and the remediation of polluted sites.

The impact of the COVID-19 pandemic on Niagara's workforce is also visible through an industry-focused lens. The first three months of 2020 are broken down in Table 2-7.

Table 2-4: Industry of Employment - Q1, 2020: St. Catharines-Niagara Census Metropolitan Area<sup>12</sup>

Industry (2-digit NAICS Code)	Jan 2020	Feb 2020	Mar 2020	Feb-Mar Change	Feb-Mar % Change
Wholesale & retail trade	32,100	32,300	29,700	-2,600	-8.0%
Health care & social assistance	23,300	25,300	25,000	-300	-1.2%
Accommodation & food services	25,800	26,100	23,100	-3,000	-11.5%
Manufacturing	22,900	21,200	19,800	-1,400	-6.6%
Educational services	16,100	17,100	17,700	600	3.5%
Construction	15,200	14,400	13,800	-600	-4.2%
Other services (except public administration)	10,800	10,300	10,400	100	1.0%
Business, building & other support services	9,500	8,400	8,300	-100	-1.2%
Information, culture & recreation	10,600	9,700	8,100	-1,600	-16.5%
Transportation & warehousing	9,100	8,600	6,900	-1,700	-19.8%
Finance, insurance, real estate, rental & leasing	7,600	7,200	6,800	-400	-5.6%
Public administration	7,400	5,900	6,100	200	3.4%
Agriculture	4,700	5,400	6,000	600	11.1%
Professional, scientific & technical services	5,900	5,500	5,300	-200	-3.6%
Utilities	1,900	1,700	1,500	-200	-11.8%
<b>Total employed</b>	<b>203,400</b>	<b>199,200</b>	<b>188,200</b>	<b>-11,000</b>	<b>-5.5%</b>

The combination of five industry sectors, *accommodation and food service; wholesale and retail trade; transportation and warehousing; information, culture and recreation, and manufacturing* account for 93.6% of month-over-month employment losses in Niagara. These data show the shock COVID-19 has had on Niagara's labour force. **As these data represent Niagara's resident workforce, they should not be seen as a proxy measure of local job losses or layoffs.** These data, and subsequent monthly updates published by the Niagara Workforce Planning Board should serve to provide a framework for guiding the efforts at an economic and employment recovery as physical distancing measures are eased.

<sup>12</sup> Statistics Canada, Labour Force Survey, Table 14-10-0097-01

## The “Complex” Impacts of COVID-19 on Employment in Niagara and Ontario

Even as the data in this section present a rapidly changing and supremely challenging workforce reality, there is cause to consider larger impacts that are harder to measure, but nonetheless happening at the local level and across Ontario.

Provincial data from Statistics Canada's Labour Force Survey captures the number of employees who were employed but reported working zero hours. Typically, this is a measure of individuals who are not working due to illness, vacations, or other expected leaves of absence that do not terminate an individual's employment. The arrival of COVID-19 has sharply increased the number of people in Ontario reporting zero-hours employment.

Isolating the month of March for 2015-2019 (e.g. March 2015, March 2016, etc.) reveals that an average of 11.9% of employed individuals in Ontario were employed at zero hours during that time period. **In March of 2020, 20.4% of employed individuals were employed at zero hours.** This means there were an estimated 532,200 more people employed at zero hours in March of 2020 than in March of 2019.

While it is possible that this half-million additional people employed at zero hours were using vacation time amid the initial uncertainty of COVID-19, preliminary analysis of the April labour force survey data shows this trend continuing. Moreover, the impact of increased zero-hours employment was not evenly distributed across industry sectors or demographics. Controlling for expected zero-hours employment shows that in March 2020, an estimated 19.6% of individuals employed in accommodation and food service (approximately 63,650 people), were employed at zero hours which is above and beyond the roughly 26,351 people who would typically be expected to be at zero hours based on a five-year reference measure.

Between February and April 2020 there were overall declines in the size of the labour force and the number of individuals reporting employment. In terms of age and gender, we see that 83.3% of the decline in the labour force and 64.2% of the decline in employment was shared by females. During the February-April 2020 time period, 64.0% of the increase in unemployment was shared by males. With regard to age cohorts, individuals aged 25 to 54 had the largest share of the drop in the labour force size (78.6% of the total labour force size decline), employment (62.8% share of the total decline), and had the largest share of the increase in unemployment (41.6% of the total increase in unemployment).

In the months to come NWPB will be using this provincial lens on the labour force to produce more detailed local estimates of “complex” employment impacts on Niagara.

## Section 3. Niagara's Industry Profile

The previous sections of this report focused on the work individuals are doing in Niagara. Here we examine employers in Niagara. In 2019, Niagara saw a total of 13,728 business with employees. Note that in these data a business is generally defined as any operation - be it for-profit, not-for-profit, or a charity - that has employees. A detailed breakdown on the number and size of these businesses is seen in Table 3-1.

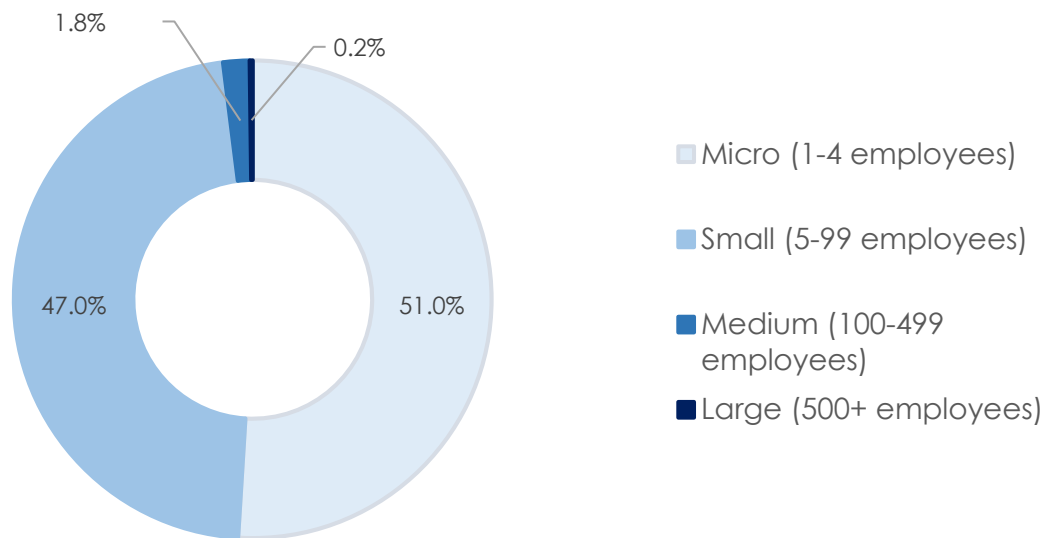
Table 3-1. Business Sizes in Niagara, 2019<sup>13</sup>

<b>Business Size</b>	<b>Total</b>	<b>% Of Businesses</b>
1-4 employees	6,998	51.0%
5-9 employees	2,817	20.5%
10-19 employees	1,835	13.4%
20-49 employees	1,288	9.4%
50-99 employees	517	3.8%
100-199 employees	165	1.2%
200-499 employees	80	0.6%
500 + employees	28	0.2%
<b>Total, with employees</b>	<b>13,728</b>	<b>100.%</b>

<sup>13</sup> Canadian Business Counts, December 2019 location counts by CD, NAICS and Employment Size Range

Segmenting these businesses into micro-, small-, medium-, and large-business sizes shows that 51.0% of employers in Niagara are micro-businesses, and that 98% of employers employ fewer than 100 individuals.

Figure 3-2. Business Sizes in Niagara, 2019<sup>14</sup>



It is important to note that the impacts of COVID-19 on all employers and self-employed individuals are happening faster than these data can be updated. The Canadian Business Count data are typically updated twice a year, and even then it can take as long as three years for a business that has closed to be removed from the counts. As such, these counts should serve as a valuable frame of reference to Niagara's industry profile before the impact of COVID-19 presented itself.

More recent data gathered from the Niagara COVID-19 Business Impact Survey found that among 2,461 surveyed businesses in Niagara, 97% reported that they were impacted by COVID-19.<sup>15</sup> Approximately 92% of those same surveyed businesses reported that they had lost revenue due to COVID-19. This survey also confirmed that most respondents anticipated escalating loss of revenue as COVID-19 stretched on. Respondents projected that if COVID-19 were not resolved within 12 months, they could expect revenue losses of \$1,353,483,235. Losses of revenue of this scope will have a direct impact on employment and the labour force.

On a positive note, at the time of the survey's publication, the vast majority of business closures were of a temporary nature. Given the uncertain impact of the pandemic, NWPB is closely monitoring these and other data that will allow us to track potential

<sup>14</sup> Canadian Business Counts, December 2019 location counts by CD, NAICS and Employment Size Range

<sup>15</sup> Niagara Economic Rapid Response Team, Niagara COVID-19 Business Impact Survey,

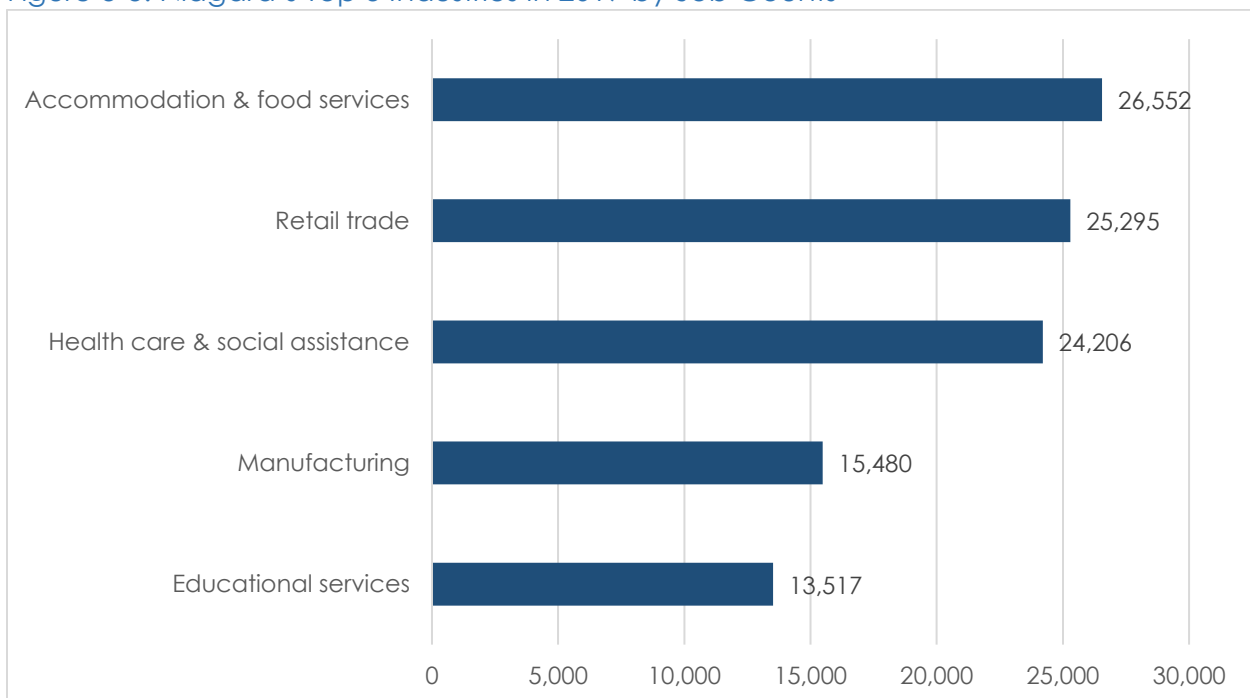


business closures that may emerge due to COVID-19. Employers requiring support to maintain operations during the pandemic should refer to the Government of Canada's business support programs.<sup>16</sup>

Where Section 2 of this report examined where Niagara's residents find employment, Figure 3-3 presents five industries that house the largest number of jobs in Niagara. *Accommodation and food service* remains the largest sector in Niagara in terms of the number of jobs. However, this sector has been hardest hit by COVID-19. The March 2020 update to the Labour Force Survey indicated that 3,000 Niagara residents lost employment in this industry over a single month. Considering the "complex" impacts noted in Section 2 of this report, there are grounds to consider how many individuals are technically employed at zero hours.

NWPB recently published a briefing note on the likely job impacts of COVID-19 on tourism industries.<sup>17</sup> This briefing note, and other documents will be updated as new data becomes available.

Figure 3-3. Niagara's Top 5 Industries in 2019 by Job Counts<sup>18</sup>



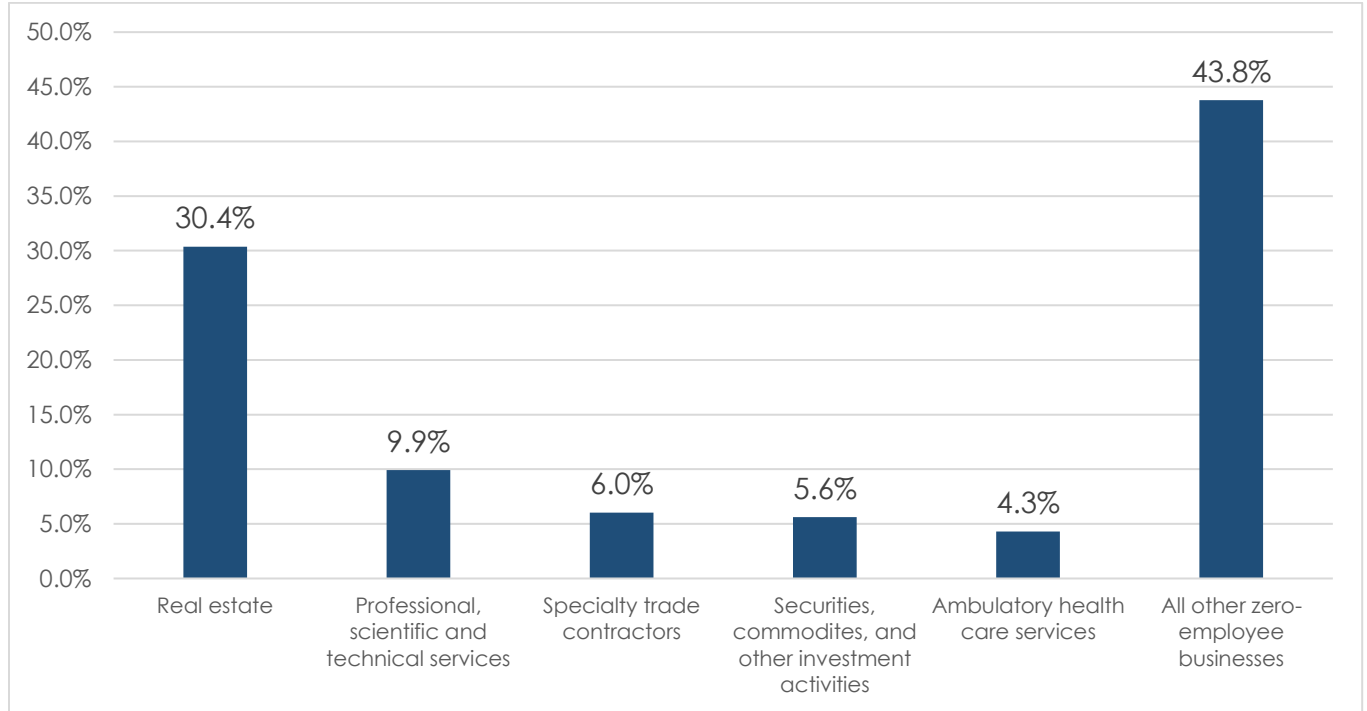
<sup>16</sup> Additional information on government support for employers can be accessed at - <https://www.canada.ca/en/department-finance/economic-response-plan.html#businesses>

<sup>17</sup> NWPB's COVID-19 tourism briefing note can be accessed at - <https://www.niagaraworkforce.ca/site/blog/2020/04/15/briefing-note-tourism-related-jobs-at-risk-niagara-covid19-april-15>

<sup>18</sup> EMSI Analyst, 2019.3 run. Note that 2019 data are based on partial year data and are, therefore, estimates.

Figure 3-4 outlines the industries that make up the top-five industry sectors of all zero-employee/self-employment businesses in Niagara. The largest sector by far is *real estate*; this is followed by businesses in *professional, scientific and technical services*.

Figure 3-4. Zero-Employee Businesses in Niagara, 2019<sup>19</sup>



As of 2019, Niagara was home to approximately 26,829 self-employed individuals based on estimates from EMSI Analyst.<sup>20</sup> This means that approximately 7,370 were employed in real estate – an industry that has seen considerable disruption due to COVID-19. The Canada Mortgage Housing Corporation's *Spring 2020 Special Editing Housing Market Outlook* notes that Canada's housing market could start to rebound by the middle of 2021.<sup>21</sup> The report further notes that housing prices will be depressed during the same time period. This broader market trend is quite likely to have a long-term financial impact on the 30.4% of Niagara's self-employed population who work in real estate.

<sup>19</sup> Canadian Business Counts, December 2019 location counts by CD, NAICS and Employment Size Range

<sup>20</sup> EMSI Analyst, 2019.3 run. Note that 2019 data are based on partial year data and are, therefore, estimates.

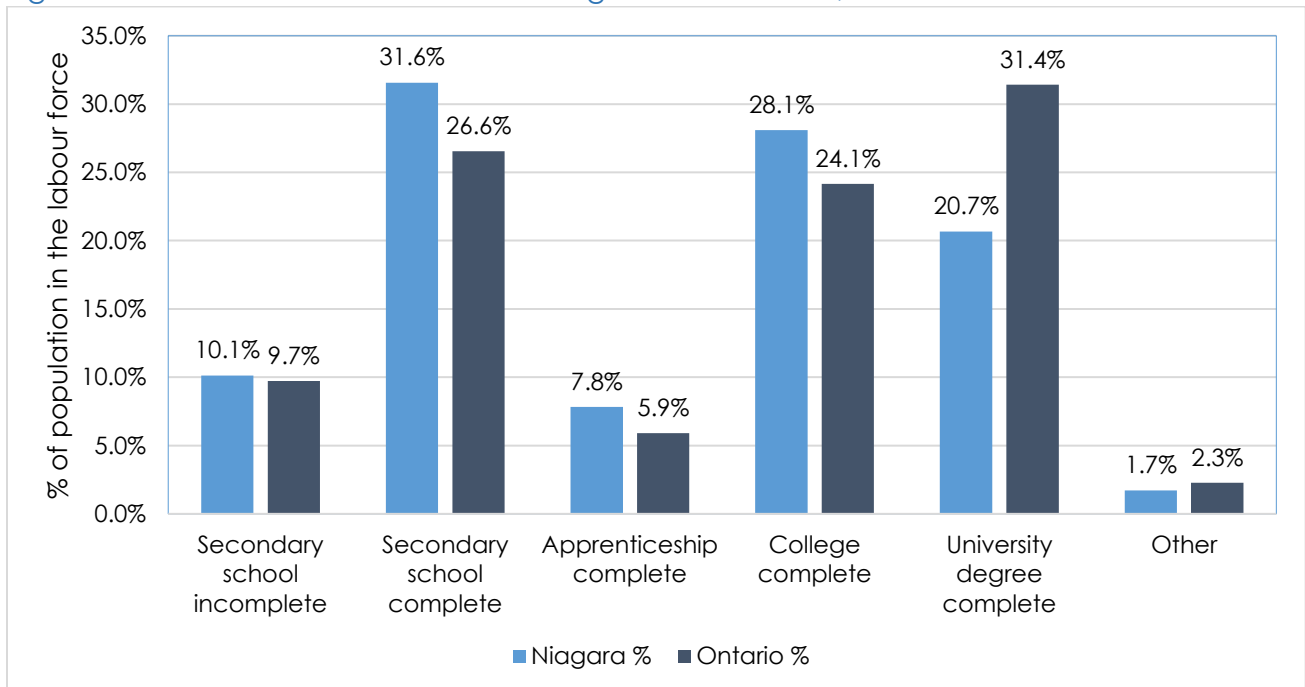
<sup>21</sup> Canada Mortgage Housing Corporation, *Housing Market Outlook, Special Edition – Spring 2020*. Retrieved from <https://www.cmhc-schl.gc.ca/en/data-and-research/publications-and-reports/housing-market-outlook-canada-and-major-centres>

## Section 4: What skills are found in Niagara's Labour Force

Data on the educational attainment of Niagara's labour force shapes a fundamental understanding of the skills that are available to local employers. While the COVID-19 pandemic has changed many aspects of the local labour market, education data is a stable, long-term indicator of the assets available to employers in uncertain times. Note: these data reflect individuals who live within the Niagara region and were either working or looking for work. People commuting into Niagara for work while living outside of the region are not represented in these data. However, NWPB can prepare these data on request.

As of 2016, approximately 203,630 Niagara residents – approximately 89.9% of Niagara's labour force – had completed some level of formal education (including a secondary school diploma, trades certificate, college diploma, or university degree). Figure 4-1 breaks down this educational attainment for Niagara with Ontario's data acting as a comparator.

Figure 4-1: Educational Attainment in Niagara and Ontario, 2016 Census<sup>22</sup>



<sup>22</sup> Statistics Canada, Census 2016, Custom Tabulation. Though dated, the 2016 census remains the most recent and most reliable data source on the local labour market's educational attainment.

The data seen in Figure 4-1 reflect that Niagara's labour force has a greater proportion of people who have completed apprenticeship training or a college diploma compared to the provincial benchmark. Niagara lags behind the provincial benchmark in terms of people who have completed a university degree.

Examining fields of study for the post-secondary trained labour force offers a deeper level of knowledge on the general skills within the local labour force, as well as the number of people who offering those skills. Almost one person in five who hold a post-secondary certification have a background in *business, management, and marketing related support services*. This is closely followed by almost 20,000 people with training in health professions.

Table 4-2: Top Fields of Study Within Niagara's Resident Labour Force<sup>23</sup>

Field of Study	Individuals in the labour force	Percentage of post-secondary trained labour force
Business, management, marketing & related support services	22,660	17.2%
Health professions & related programs	19,445	14.7%
Education	8,105	6.1%
Engineering technologies & engineering-related fields	6,795	5.1%
Mechanic & repair technologies/technicians	6,260	4.7%
Personal & culinary services	5,930	4.5%
Construction trades	5,335	4.0%
Social sciences	5,115	3.9%
All other fields	52,455	39.7%
<i>All types of post-secondary training</i>	<i>132,100</i>	<i>100.0%</i>
<b>Total</b>	<b>226,590</b>	

The months of the pandemic saw increased demand for individuals with skills in health care, primarily to support a surge in workforce demand in long-term and residential care facilities. As the post-pandemic employment landscape remains uncertain, NWPB will be closely working with our partners and stakeholders to investigate emerging skill needs.

<sup>23</sup> Statistics Canada, Census 2016, Custom Tabulation, selected fields of study based on those fields that represent at least 2% of total post-secondary educational attainment in the Niagara region. A full version of this table will be available for review online with the publication of NWPB's full 2020 Labour Market Report in Fall 2020.

## Section 5. What Jobs are in Demand in Niagara?

This section provides an overview of employer-identified job demand. To measure this demand, NWPB aggregates online public job posts. While this approach cannot account for private job demand (e.g., a company's private job board) or informal recruiting methods (e.g., word-of-mouth recruiting), it does serve to give us a baseline for understanding where employers are looking to hire.

Here, we outline annual levels of job demand for 2018 and 2019. Consistent with previous occupational-level data (see Section 2) we see the most job demand was for *sales and service occupations* in both 2018 and 2019. We also saw a 19.1% increase in the year-over-year job demand for *sales and service occupations*.

Table 5-1. Job Posts by 1-digit NOC, Niagara 2018-2019<sup>24</sup>

Occupation	2018		2019		2018-19 Change	
	Job Posts	%	Job Posts	%	Job Posts	%
Sales & service occupations	5,103	41.2%	6,076	41.2%	973	19.1%
Business, finance & administration occupations	1,865	15.1%	1,907	12.9%	42	2.3%
Trades, transport & equipment operators & related occupations	1,170	9.5%	1,604	10.9%	434	37.1%
Occupations in education, law & social, community & government services	847	6.8%	1,209	8.2%	362	42.7%
Management occupations	884	7.1%	1,068	7.2%	184	20.8%
Health occupations	869	7.0%	859	5.8%	-10	-1.2%
Natural & applied sciences & related occupations	601	4.9%	751	5.1%	150	25.0%
Natural resources, agriculture & related production occupations	253	2.0%	374	2.5%	121	47.8%
Occupations in manufacturing & utilities	292	2.4%	311	2.1%	19	6.5%
Occupations in art, culture, recreation & sport	169	1.4%	187	1.3%	18	10.7%
<i>Unclassified occupation</i>	318	2.6%	418	2.8%		
<i>Unavailable</i>	4	0.03%	0	0.0%		
<b>Total</b>	<b>12,375</b>	<b>100.0%</b>	<b>14,764</b>	<b>100.0%</b>	<b>2,389</b>	<b>19.3%</b>

<sup>24</sup> Source: Gartner TalentNeuron; Niagara County; January 1 – December 31, 2018; January 1 – December 31, 2019 excluding Kijiji; available jobs

These 2019 job demand data should be seen as a baseline for how publically posted job demand changed in early 2020 amid Ontario's emergency declaration beginning March 17, 2020 and the order to close non-essential businesses on March 24, 2020. As provincial and federal measures addressing COVID-19 were introduced in the latter half of March, weekly job demand data began to change.

Figure 5-2. New Job Posts, February – March 2019 and 2020, Niagara<sup>25</sup>

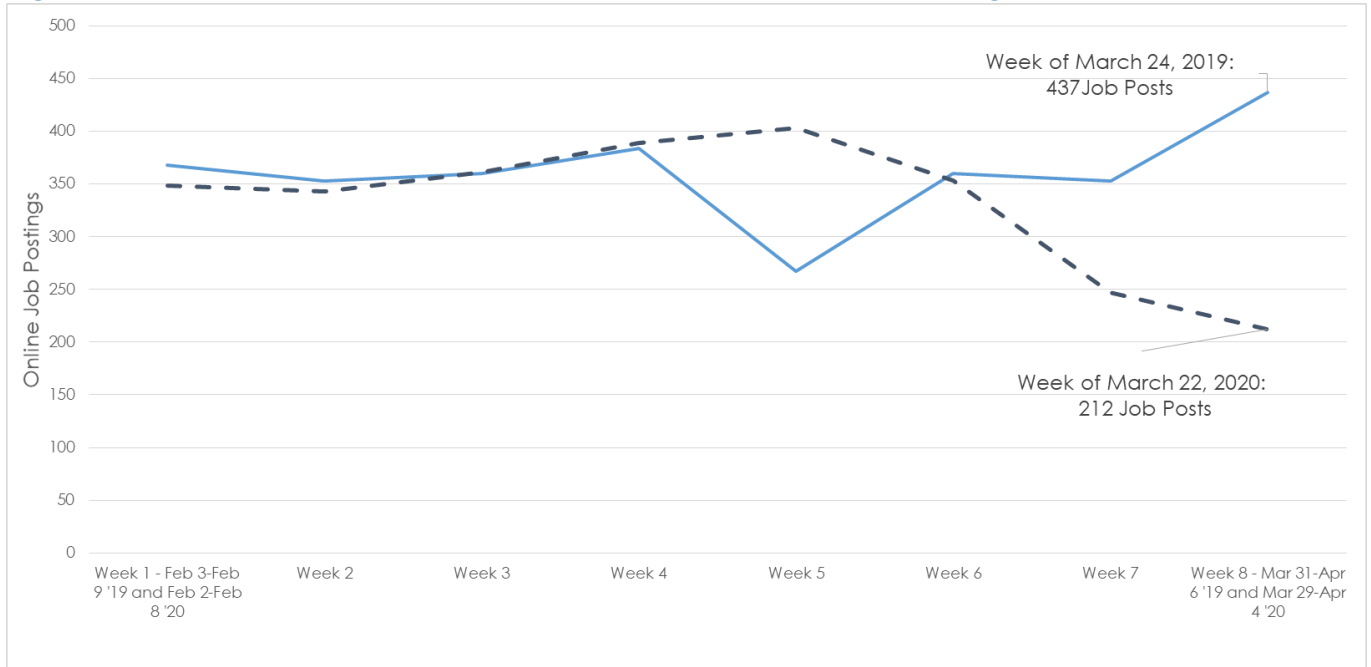


Figure 5-2 shows weekly job demand data from the first week of February 2020 through to the fourth full week of March 2020. Data from the same 8 weeks in 2019 offer a historical comparison. These data show that Niagara's week-over-week job demand trends began to change during the week of March 15, 2020 (week 7). During the week of March 22, 2020 (week 8), measurable job demand decreased by 51.5% compared to 2019.

Given that changes continue to occur due to COVID-19, NWPB is providing regular updates on local sectors, general employment, and job demand in Niagara. These updates can be found on our website, [niagaraworkforceboard.ca](http://niagaraworkforceboard.ca)

<sup>25</sup> Source: Gartner TalentNeuron; Niagara County; Feb 3-March 30, 2019; Feb 2-March 28, 2020, new job posts only, excluding job posts originating on kijiji.com

## Concluding Remarks and Next Steps

Since the beginning of the COVID-19 pandemic, NWPB has worked to provide timely and locally-focused labour force insights through briefing notes and monthly publications – all of which can be accessed at [www.niagaraworkforce.ca/COVID-19](http://www.niagaraworkforce.ca/COVID-19). Moving forward we will continue to monitor and report on changing labour market conditions as we build toward the release of our full 2020 labour market planning report.

During that time we will be engaging in one-on-one employer consultations, leveraging emerging data sets to gain new insights, and updating our job demand reporting to ensure that we are supporting front-line employment services staff who are working with individuals and employers during this time of crisis.

As an organization, we are dedicated to bringing objective, accurate, and future-focused workforce research to the forefront of conversations as a means of supporting planning and decision making. These times demand that we do our utmost to respond to changing situations while ensuring that a desire to be reactive does not compromise the integrity of our work. In the coming months, NWPB staff will be available for presentations and discussions as the entire country works to finding an equilibrium during these challenging times. In the coming months, NWPB will be releasing publications on the following topics:

- Gender and employment equity in Niagara
- Updated briefing notes on the impact of COVID-19
- Bi-weekly job demand reports

NWPB will also be updating our workforce/self-employment survey as well as our employer survey to support the COVID-19 recovery.

Any questions about this report can be directed to NWPB's CEO, Vivian Kinnaird – [vivian@niagaraworkforce.ca](mailto:vivian@niagaraworkforce.ca)



# **NIAGARA WORKFORCE PLANNING BOARD**

For additional information on the local labour market, and to review previous publications, please visit our website at [www.niagaraworkforce.ca](http://www.niagaraworkforce.ca)

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