

Region of Waterloo

Planning, Development, and Legislative Services

Growth, Development, and Sustainability

To: Sustainability, Infrastructure, and Development Committee

Meeting Date: February 11, 2025

Report Title: Region of Waterloo Workplace Count 2024

1. Recommendation

For information.

2. Purpose / Issue:

The Workplace Count, a collaboration with Area Municipalities and the Waterloo Economic Development Corporation (WaterlooEDC), is a region-wide survey of local businesses, conducted every two to three years. The survey took place between May and September 2024, and gathered essential data from diverse workplaces spanning cities, rural areas, and employment hubs across Waterloo Region. The data collected through the 2024 Workplace Count enhances the Regions and Area Municipalities analytical capacity, by providing granular insights into the local economy and is not available from any other source

3. Strategic Plan:

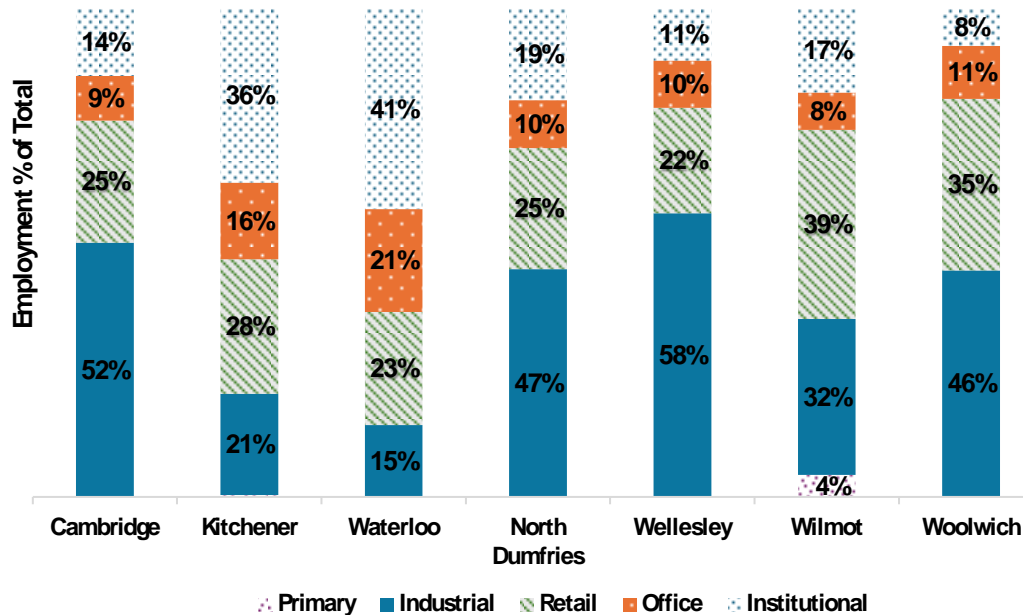
The tracking and monitoring of employment data contributes to the development of programs and services aligned with the Equitable Services and Opportunities, and Resilient and Future Ready Organization objectives.

4. Report Highlights:

- The 2024 Workplace Count visited over 11,000 establishments, of which, 8,300 successfully completed the survey. This represents a completion rate of 74%. Of the completed survey, over 178,000 employees were identified.
- In partnership with Waterloo EDC, in 2024 the Workplace Count was extended to rural businesses located on farm properties (known as on-farm diversified uses). Some examples of the rural businesses surveyed include furniture manufacturers, sheet metal fabricators, or carpentry shops.
- Region-wide, the Industrial, Institutional and, Retail sectors employed a similar amount of jobs, accounting for 29 per cent, 29 per cent and 26 per cent of total

employment, respectively.

Employment by Sector and Municipality



- Key findings of the survey include:

- The majority (62%) of workplaces in the Region employed 1-9 employees. Workplaces with 1-9 employees accounted for 12 per cent of employment.
- Businesses with 500+ employees accounted for less than half a per cent of workplaces, but 28 per cent of employment in the Region.
- Across all sectors, 73 per cent of employment in the Region was full-time, while 27 per cent of employment was part-time.
- The manufacturing sector had the highest proportion of full-time employees, with 96% of jobs being full-time.
- The arts, entertainment, and recreation sector had the highest proportion of part-time jobs at 71%.
- Of the Rural businesses surveyed, manufacturing was the top sector, representing 44% of surveyed businesses.

- A comprehensive 2024 Workplace Count bulletin is attached to this report

5. Background:

The Region’s fifth Workplace Count was undertaken from May to September of 2024 to

collect data on places of employment throughout Waterloo Region. The survey did not collect information on workplaces in homes, or agricultural establishments engaged in growing crops or raising animals. The survey was voluntary, and businesses could refuse to participate or choose to only answer some of the survey questions. The data collected provides the most comprehensive, detailed and current employment data in Waterloo Region and helps the Region of Waterloo and Area Municipalities plan for and meet ongoing needs for services and infrastructure. The data supports the Regions and Area Municipalities ability to identify trends, measure sectoral growth and anticipate future needs across the community. The ability to track employment across various sectors, municipalities, and business sizes provides a solid foundation for evidence-based decision-making, enabling the Region and Area Municipalities to more effectively plan for infrastructure, services, and economic development initiatives. Moreover, by incorporating the data into various strategic planning and forecasting models, the Region is better equipped to respond to emerging opportunities and challenges, ensuring a resilient, future-ready economy. The Workplace Count is also an important tool in supporting a number of economic development priorities across Waterloo Region. Some of the priorities that the data supports include the following:

- Producing a variety of infographic, mapping, and other products that illustrate the diversity and composition of the Region's economy;
- Providing input for planning studies;
- Informing square footage per employee assumptions for Development Charges Background studies;
- Assisting with business retention and attraction, and populating databases such as client relationship management (CRM) and business directories;
- Responding to requests for information about Waterloo Region's economy;
- Creating employment estimates and growth forecasts for infrastructure planning purposes;
- Informing Regional and Area Municipal strategic and operational projects such as two-way all-day GO service, monitoring change in the Central Transit Corridor, Stage 2 ION, and transit planning;
- Assessing labour force needs in key employment areas, including childcare and infrastructure requirements; and
- Informing investment attraction efforts by providing insights on industry supply chains and employment demand.

An important distinction in this year's survey is the collection of data in rural areas. Historically, the Workplace Count focused on collecting data from the cities, and urbanized areas in the townships such as New Hamburg, Elmira, and St. Clements. While data was still collected in these geographies, the 2024 survey was expanded to collect information from businesses located in rural areas, outside of the aforementioned settlement areas. Agriculture data from the census is available for businesses that solely participate in agricultural activities, but does not include

information on rural businesses that have distinct operations unrelated to agriculture. The Rural Survey targeted businesses not primarily engaged in agricultural activities such as growing crops or raising animals. Some examples of the rural businesses surveyed include furniture manufacturers, sheet metal fabricators, or carpentry shops. Many of these businesses exist as ancillary uses on farm properties, often referred to as on-farm diversified uses. Information specific to the rural survey has been summarized as a separate appendix. This data is not available from any other source. Statistics Canada Labour Force Survey data is not comparable, as it provides information focused on employed people who live in the region, as opposed to the workplaces and jobs that are located in the region.

6. Communication and Engagement with Area Municipalities and the Public

Area Municipalities:

A Municipal Advisory Group comprised of both Planning and Economic Development staff from the Area Municipalities provided advice and support throughout the Workplace Count project. This group was effective in spreading the news about the survey within their respective communities and also collected data from large employers to contribute to the survey. Information from the project is shared with the Area Municipalities.

A sincere thanks is extended to all Area Municipal staff, Regional ITS/GIS and the Waterloo Region business community who helped to make this project a success.

Public:

Communication with the public has been consistent throughout the Workplace Count project. Final data will be summarized and shared through the Region of Waterloo website.

7. Financial Implications:

This information directly supports strategic initiatives like infrastructure planning, workforce development, and economic forecasting, ensuring that investments are aligned with regional growth trends and is essential for optimizing resource allocation and supporting targeted investment.

8. Conclusion / Next Steps:

Workplace Count data is being shared with Area Municipalities for their use. The Region of Waterloo will continue to monitor the region's businesses, with another workplace count project anticipated in 2026.

9. Attachments:

Appendix A: 2024 Urban Workplace Count Appendix

Appendix B: 2024 Rural Workplace Count Appendix

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