



Date: **February 11, 2025**

Subject: **2024 Workplace Count**

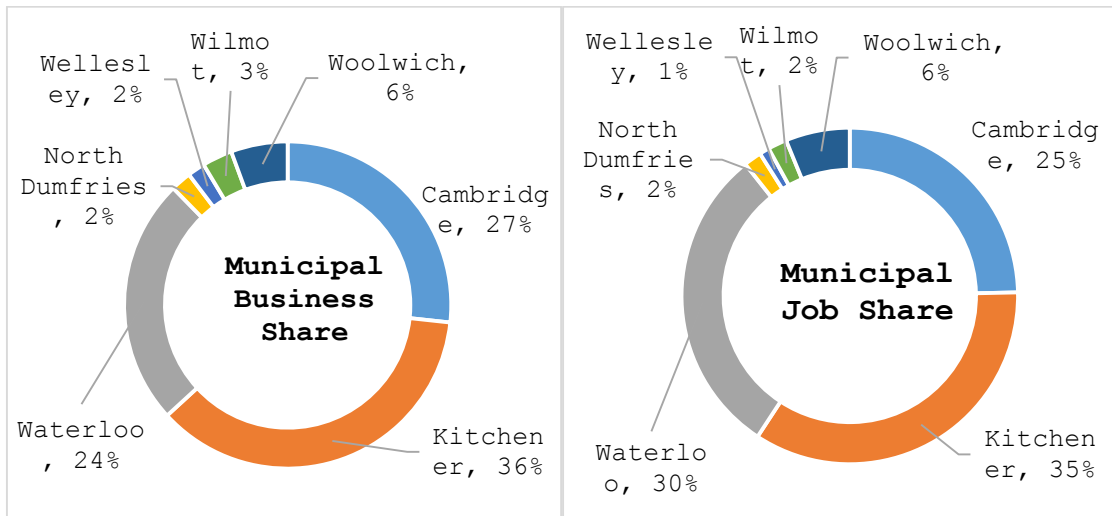
This bulletin provides details from the 2024 Workplace Count survey. The Workplace Count surveys places of employment to provide a comprehensive understanding of the characteristics of businesses throughout the Region. The project targets businesses that have a physical location in Waterloo Region. The survey is voluntary, and businesses could refuse to participate or choose to only answer some of the survey questions. The results presented in the report are based on survey responses received. The Workplace Count project visited over 11,000 establishments, of which, 8,300 successfully completed the survey. The survey did not collect information on workplaces in homes, or agricultural establishments engaged in growing crops or raising animals. Therefore, the data does not represent total employment in Waterloo Region.

The results presented in this bulletin represent businesses located throughout the Regions cities, township urban areas, and settlement areas. A survey of rural businesses was conducted in 2024, the results can be found in Appendix B – 2024 Rural Survey of report PDL-GDS-25-002. The Rural Survey targeted businesses located outside of settlements, in the Region’s rural areas, that are not engaged in agricultural activities.

Survey Highlights:

The majority of businesses (87%) are located within Cambridge, Kitchener, and Waterloo, with the remaining 13% located in the townships. A higher proportion of jobs are located in the cities (90%) with 10% of jobs located in the townships.

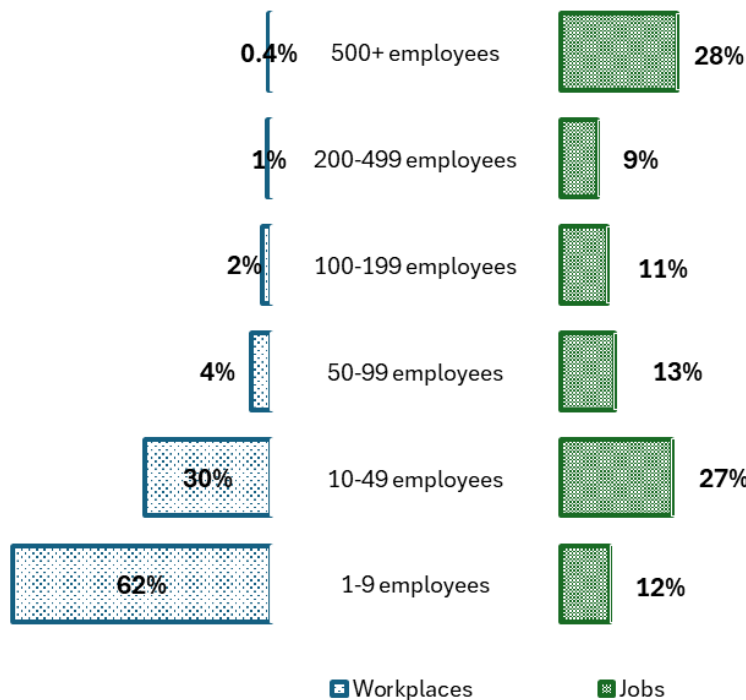
Figure 1: Municipal Business and Job Share



Size of Workplace

The majority of businesses have fewer than 10 employees, representing 62% of all business establishments in the Region. Although representing the majority of businesses in the Region, small businesses accounted for 12% of employment. Medium sized businesses with 10-49 employees, accounted for 30% of businesses and 27% of all employment in the Region. Large employers, those with more than 500 employees represented less than half a per cent of all regional businesses, though employed 28% of jobs in the Region.

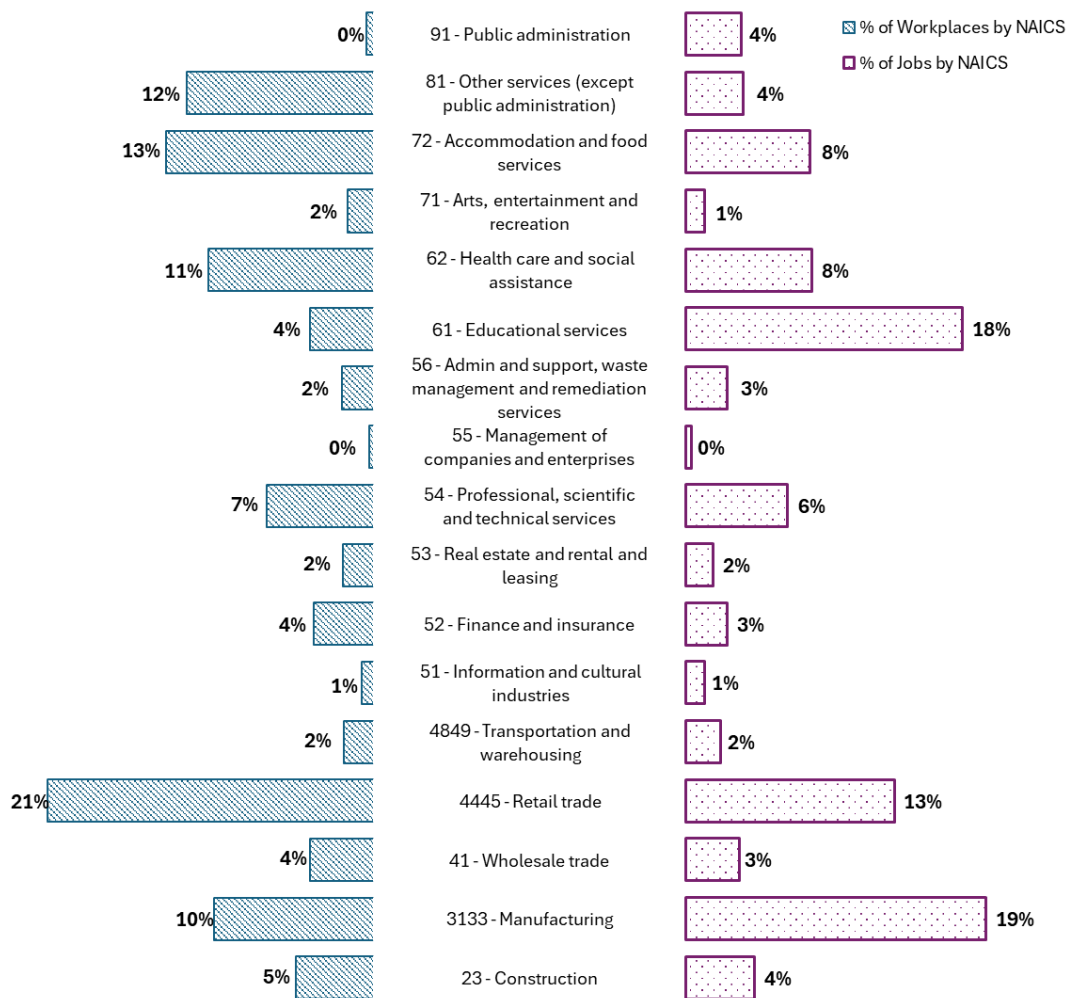
Figure 2: Jobs and Workplaces by Size of Workplace



Employment by Sector:

The Workplace Count uses the 2022 North American Industrial Classification System (NAICS) to categorize employment by sector. Manufacturing reported the highest employment in the Region, consisting of 19% of the Regions surveyed employment, with the majority of those jobs being full-time. Three post-secondary institutions in the Region contribute to the educational services sector employing the second highest proportion of jobs, at 18%. Retail trade is the top sector in terms of business locations with over one fifth (21%) of all the Regions workplaces identified (Figure 3).

Figure 3: Employment Breakdown by Sector



The following table provides a breakdown of employment based on NAICS into broader employment sectors. The Workplace Count data was collected and categorized based on NAICS. NAICS is an industry classification system developed by statistical agencies in North America, to classify business establishments for the purpose of collecting and analyzing business information. The broader employment sectors are groupings of common industries in terms of the physical space and geographic locations they occupy.

Table 1: Employment Sector Breakdown by Two-Digit NAICS

Sector by 2-Digit NAICS	Employment Sector
11 - Agriculture, Forestry, Fishing and Hunting	Primary
21 - Mining, Quarrying, and Oil and Gas Extraction	Primary
22 - Utilities	Industrial
23 - Construction	Industrial
31-33 - Manufacturing	Industrial
41 - Wholesale trade	Industrial
44-45 - Retail trade	Retail
48-49 - Transportation and warehousing	Industrial
51 - Information	Office
52 - Finance and Insurance	Office
53 - Real Estate and Rental and Leasing	Office
54 - Professional, Scientific, and Technical Services	Office
55 - Management of Companies and Enterprises	Office
56 - Administrative and Support and Waste Management and Remediation Services	Office
61 - Educational Services	Institutional
62 - Health Care and Social Assistance	Institutional
71 - Arts, Entertainment, and Recreation	Retail
72 - Accommodation and Food Services	Retail
81 - Other Services (except Public Administration)	Retail
91 - Public administration	Institutional

Employment by Sector and Employment Status

Across all sectors, 73 per cent of employment in the Region was full-time, while 27 per cent of employment was part-time. The arts, entertainment, and recreation sector had the highest proportion of part-time jobs at 71%, followed by accommodation and food services, where 54% of employment was part-time. Conversely, 96% of manufacturing jobs were full-time, the highest proportion among all sectors for full-time employment. Similarly, transportation and warehousing, wholesale trade and construction are primarily comprised of full-time jobs (Figure 4).

Figure 4: Employment by 2-Digit NAICS and Employment Status

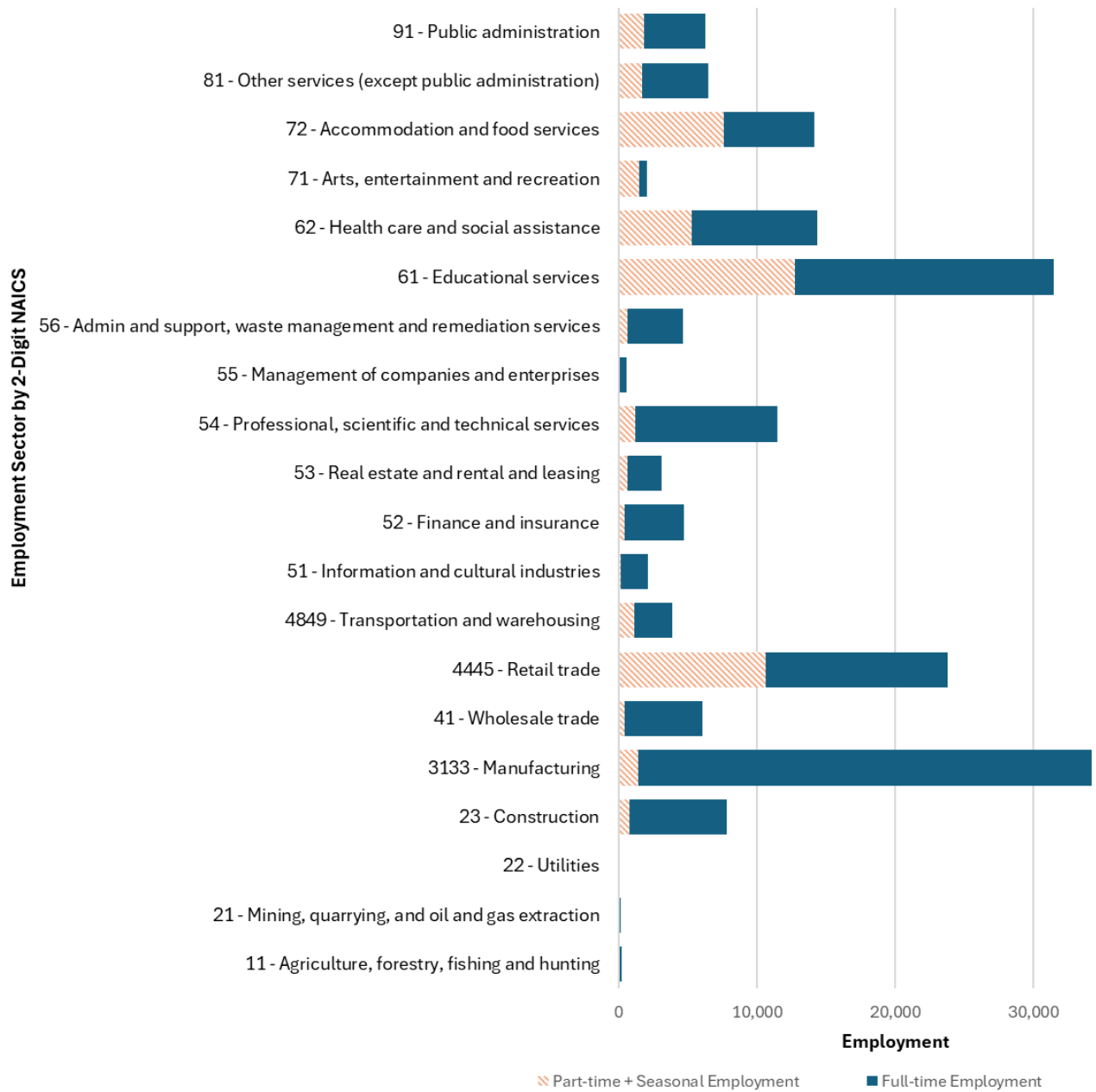
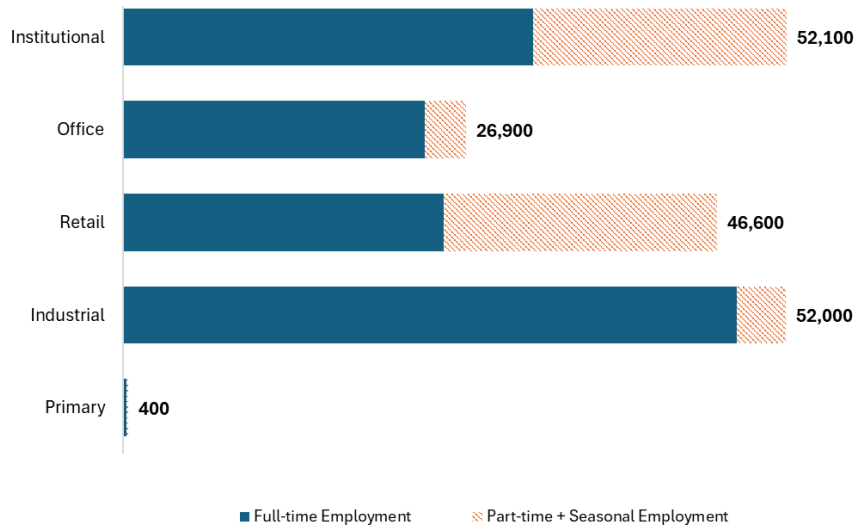


Figure 5: Employment by Sector and Employment Status

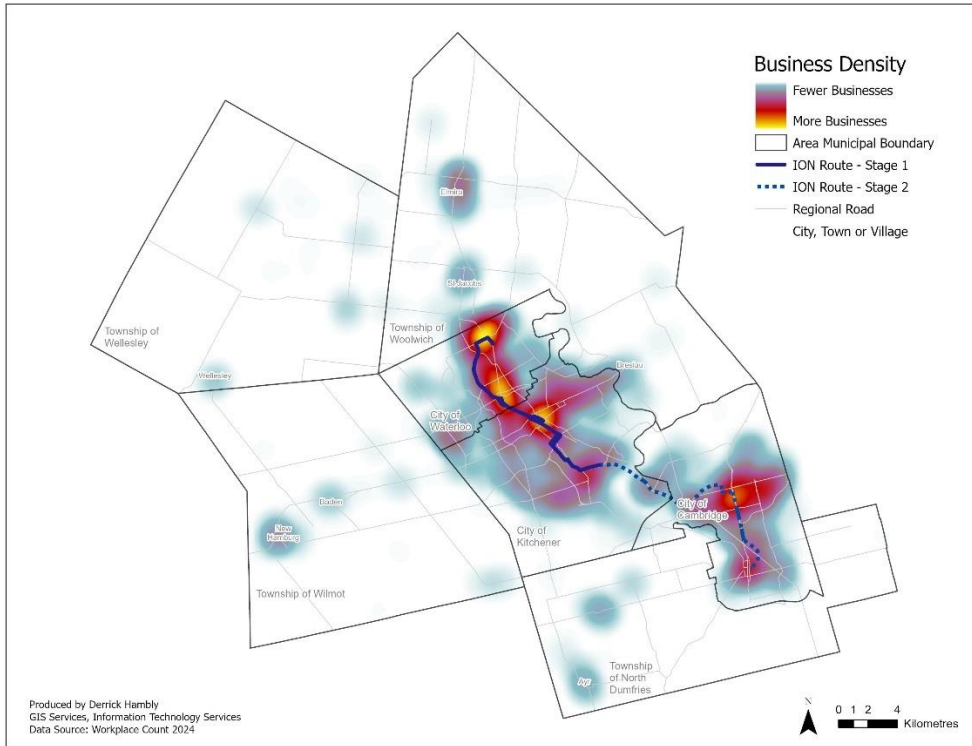


Geographic Distribution of Businesses and Jobs

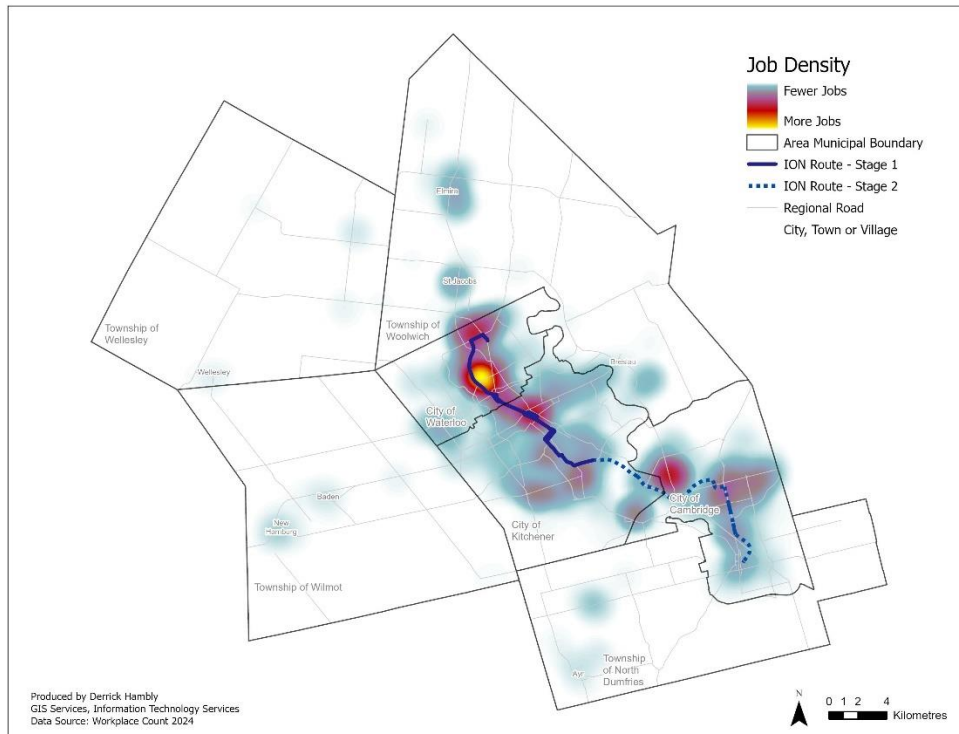
The Regions businesses are largely concentrated around the ION rapid transit route, connecting the larger malls (Conestoga, Fairway, and Cambridge Centre), to the core areas of Uptown Waterloo, Downtown Kitchener, and Downtown Galt (Map 1). Nearly a third of all businesses in the Region are located within 800 meters of an ION station, these areas primarily consist of retail, institutional, and office-based businesses.

Comparatively, the Regions jobs are largely concentrated around the Universities in the City of Waterloo, along the ION route in both Kitchener and Waterloo as well as in employment areas such as the East Side Lands in Cambridge (Map 2). These areas are comprised of Institutional, Retail, and Industrial employment.

Map 1: Locations of Businesses



Map 2: Location of Jobs



Employment Areas:

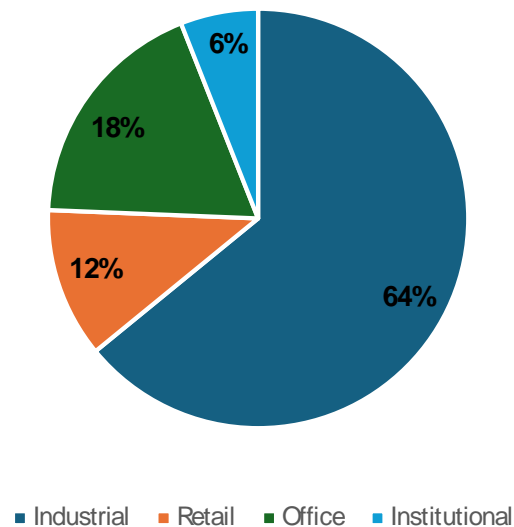
The Region's Employment Areas are strategically located areas intended to accommodate business and economic activities, such as manufacturing, warehouses, research and development and associated retail and ancillary facilities. These areas are crucial for the Region's long-term economic health and are to be protected for current and future employment uses.

Currently, Employment Areas contain 30% of identified workplaces and 38% of all jobs in the Region. Furthermore, a substantial 82% of the Region's manufacturing jobs are concentrated within Employment Areas as illustrated in Map 3.

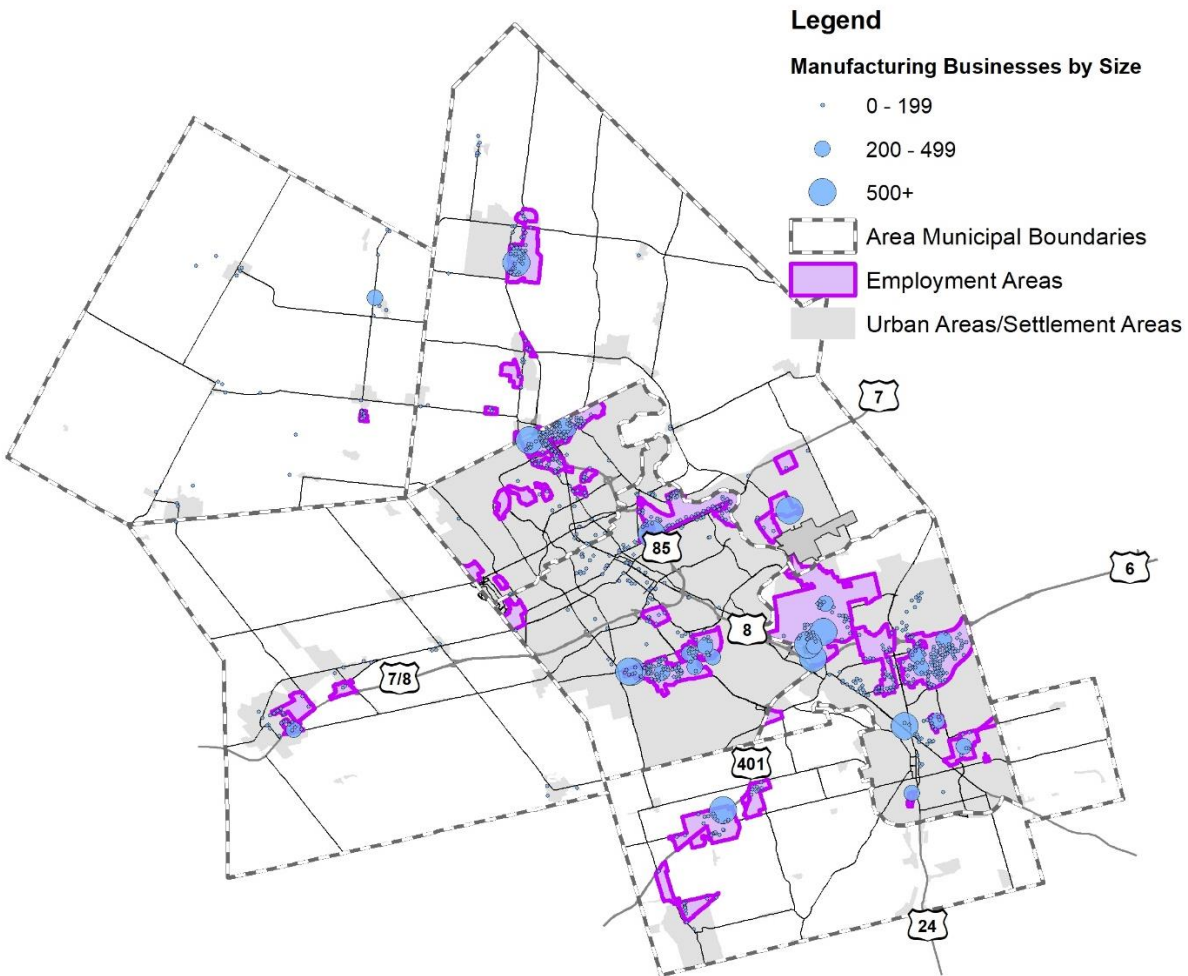
Recent updates to Provincial planning policies have tightened the criteria for designating Employment Areas. With this change, certain uses, including institutional, commercial, retail and office spaces not directly related to the primary employment activities, are no longer permitted within these areas.

Figure 6 shows a breakdown of employment by type within Employment Areas. Notably, nearly one in three job types may no longer meet the new designation criteria. This could potentially result in the gradual conversion of these uses to non-employment uses.

Figure 6: Breakdown of Employment by Type on Employment Areas



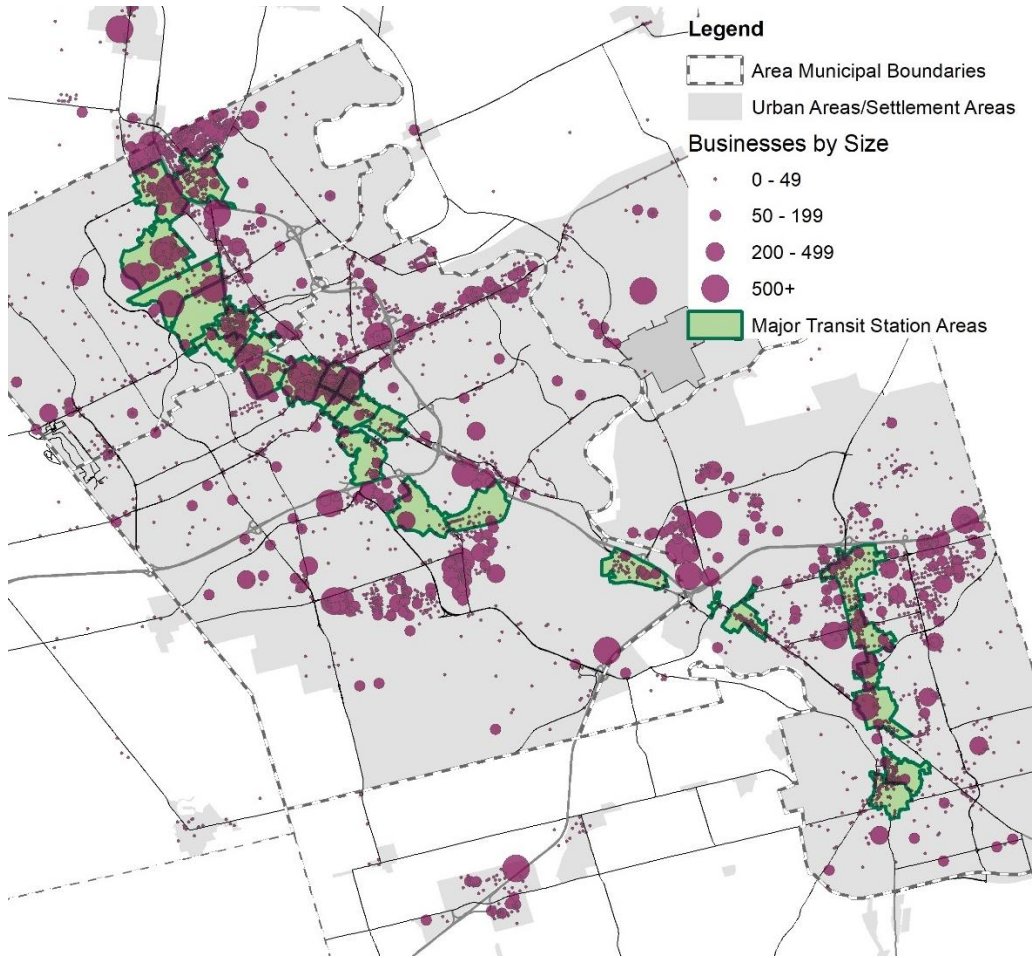
Map 3: Distribution of Manufacturing Businesses



Major Transit Station Areas:

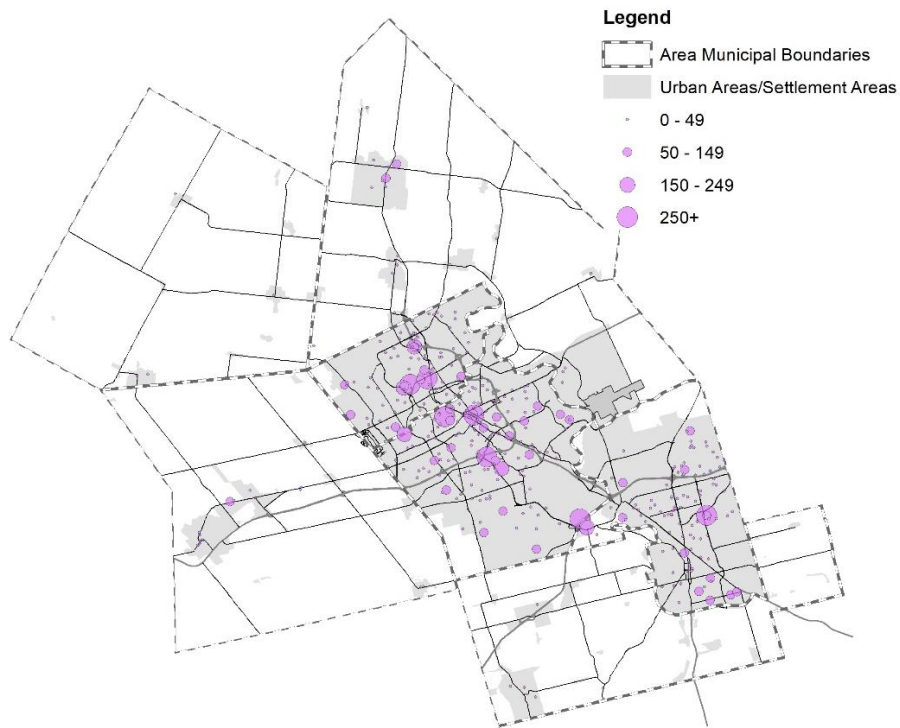
Major Transit Station Areas (MTSAs) are generally defined as the area within an approximate 500 to 800-metre radius of a transit station. This is considered the distance most people will walk to take rapid transit. Waterloo Region has 27 MTSAs along the ION rapid transit corridor. Over 30% of the Region's workplaces, including some of the regions major employers, exist within MTSAs. The establishments located within MTSAs employ more than 50,000 workers, representing 28% of the surveyed jobs across the Region. This indicates that a large share of the Region's jobs are serviced by rapid transit, with an even larger share being serviced by the Grand River Transit bus network.

Map 4: Distribution of Businesses within MTSAs



Appendix A: Spatial Distribution of Businesses by Sector

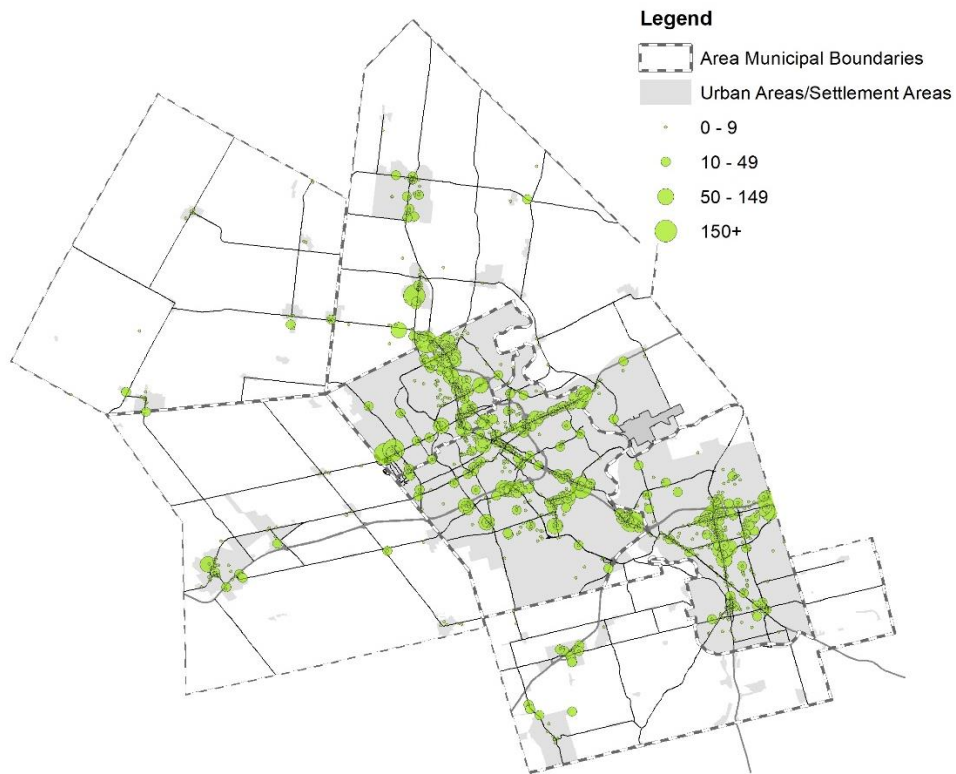
Map A: Educational Services by Number of Employees



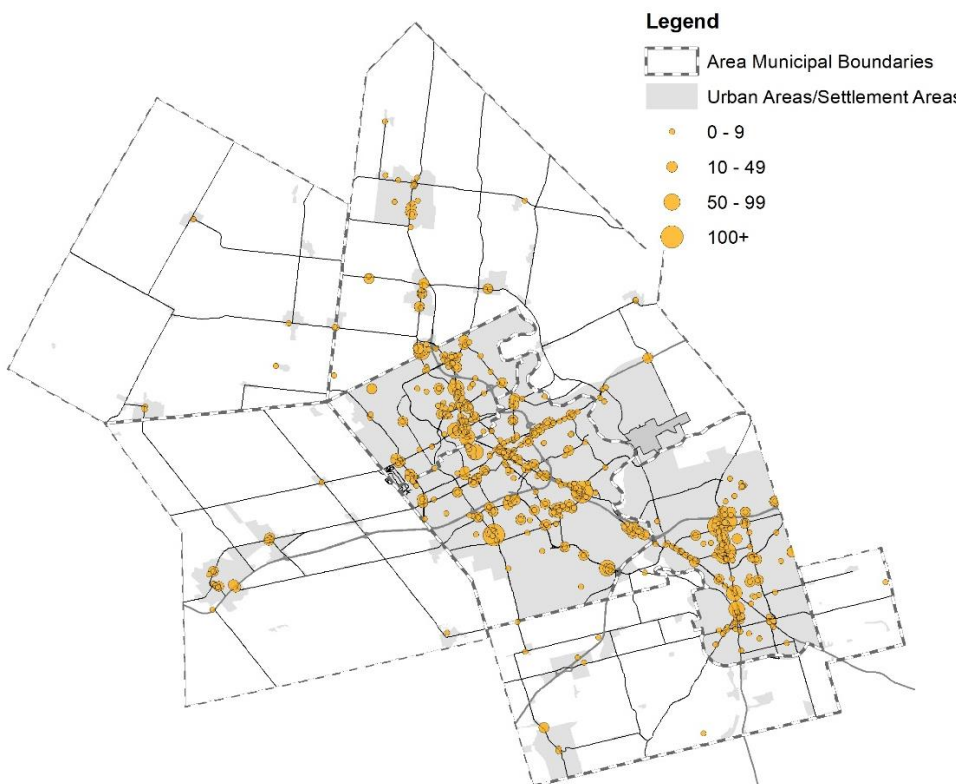
Map B: Office Businesses by Number of Employees



Map C: Retail Businesses by Number of Employees

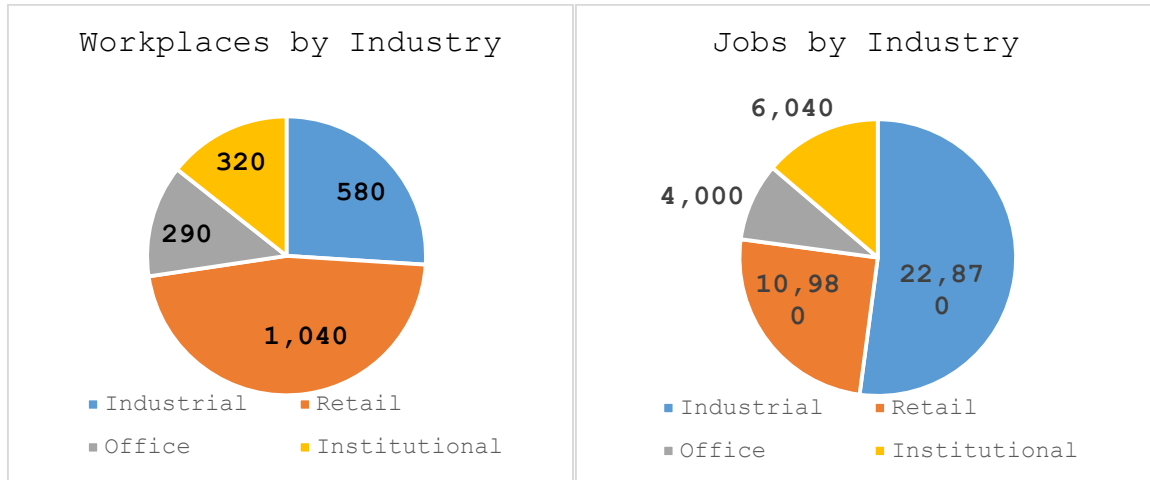


Map D: Accommodation and Food Service Businesses by Number of Employees



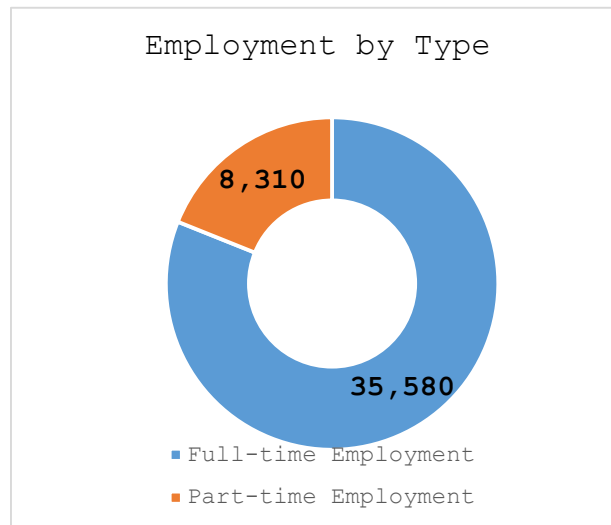
Appendix B: City of Cambridge Profile

The City of Cambridge contains over 2,200 unique workplaces, which represents 27% of the regional total. Retail and industrial makeup a significant portion of the City of Cambridge's workplaces and jobs. Nearly a quarter of workplaces in Cambridge are industrial. However, the industrial sector employs more than half of the 44,000 jobs located within the City of Cambridge.

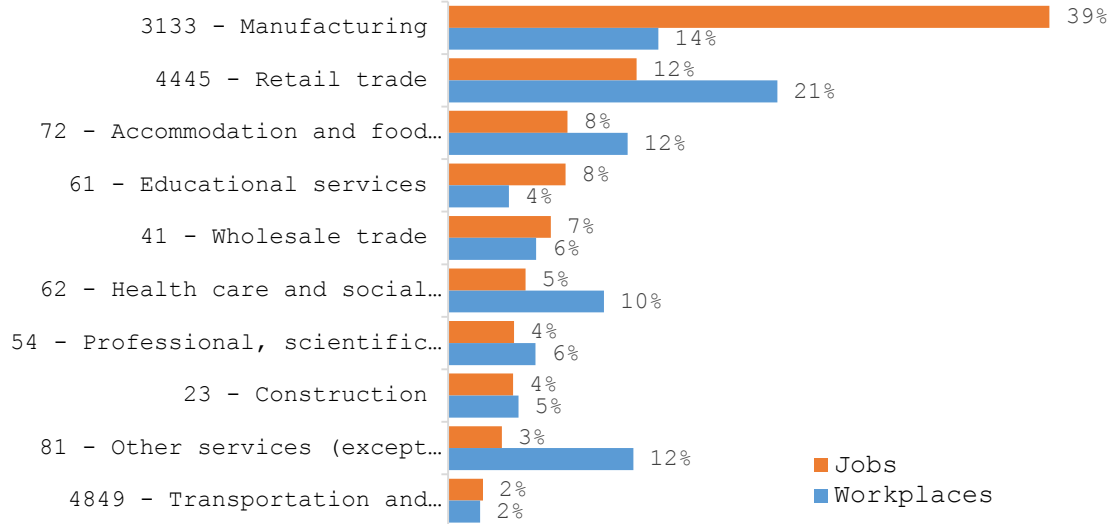


Employment by Type

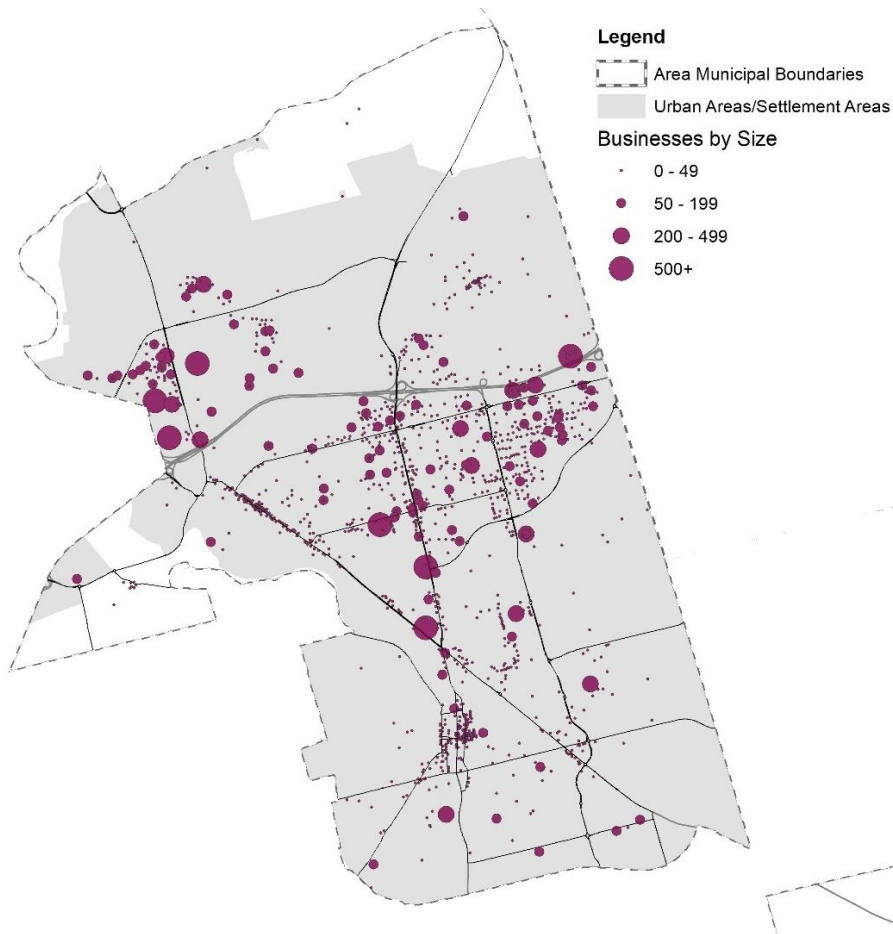
Of Cambridge's 44,000 jobs, 81% are full-time and 19% are part-time. The proportion of full-time employees in Cambridge is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in Cambridge, which generally employ full-time workers.



Top 10 Employment Sectors in Cambridge

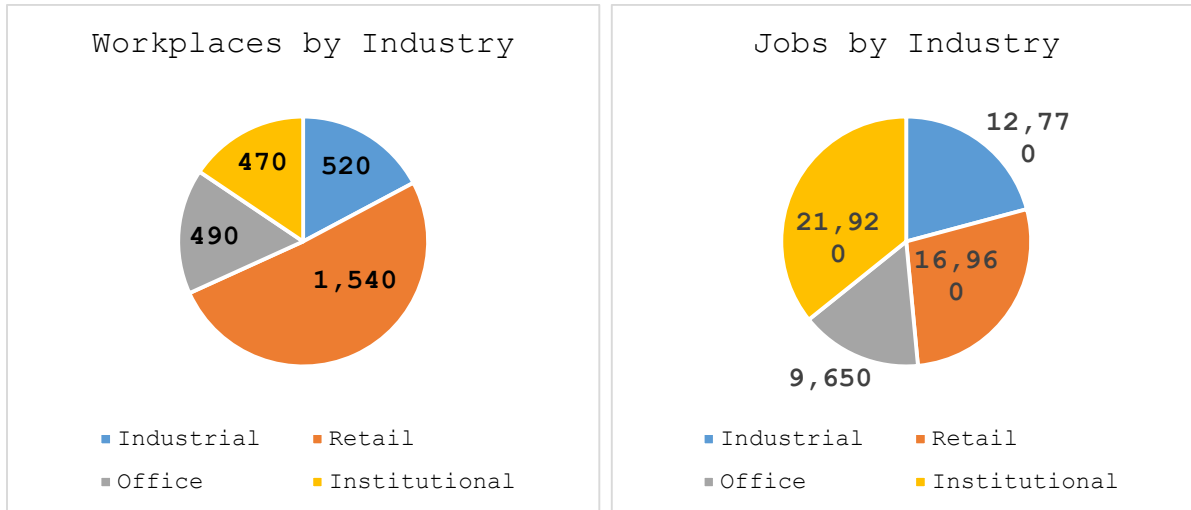


Spatial Distribution of Businesses in Cambridge



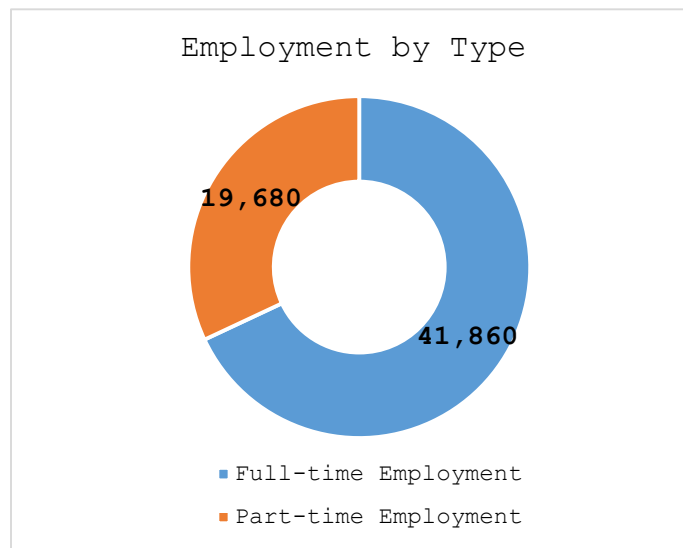
Appendix C: City of Kitchener Profile

The City of Kitchener contains over 3,000 unique workplaces, which represents 36% of the regional total. The retail sector makes up a significant portion of the city's workplaces (51%). Jobs are more evenly distributed across industries, with institutional containing 36% of jobs, retail with 28%, industrial at 21% and office at 16% of jobs in Kitchener.

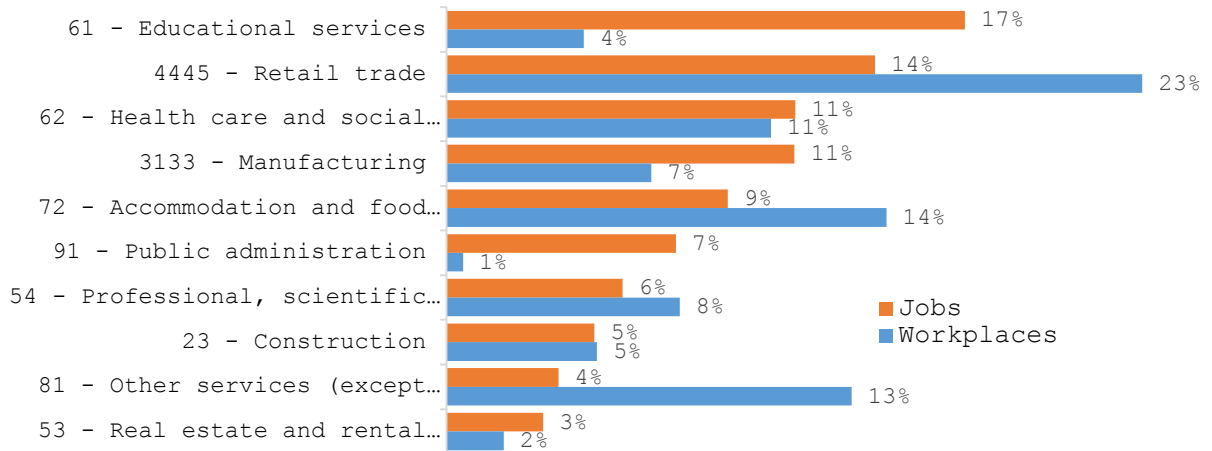


Employment by Type:

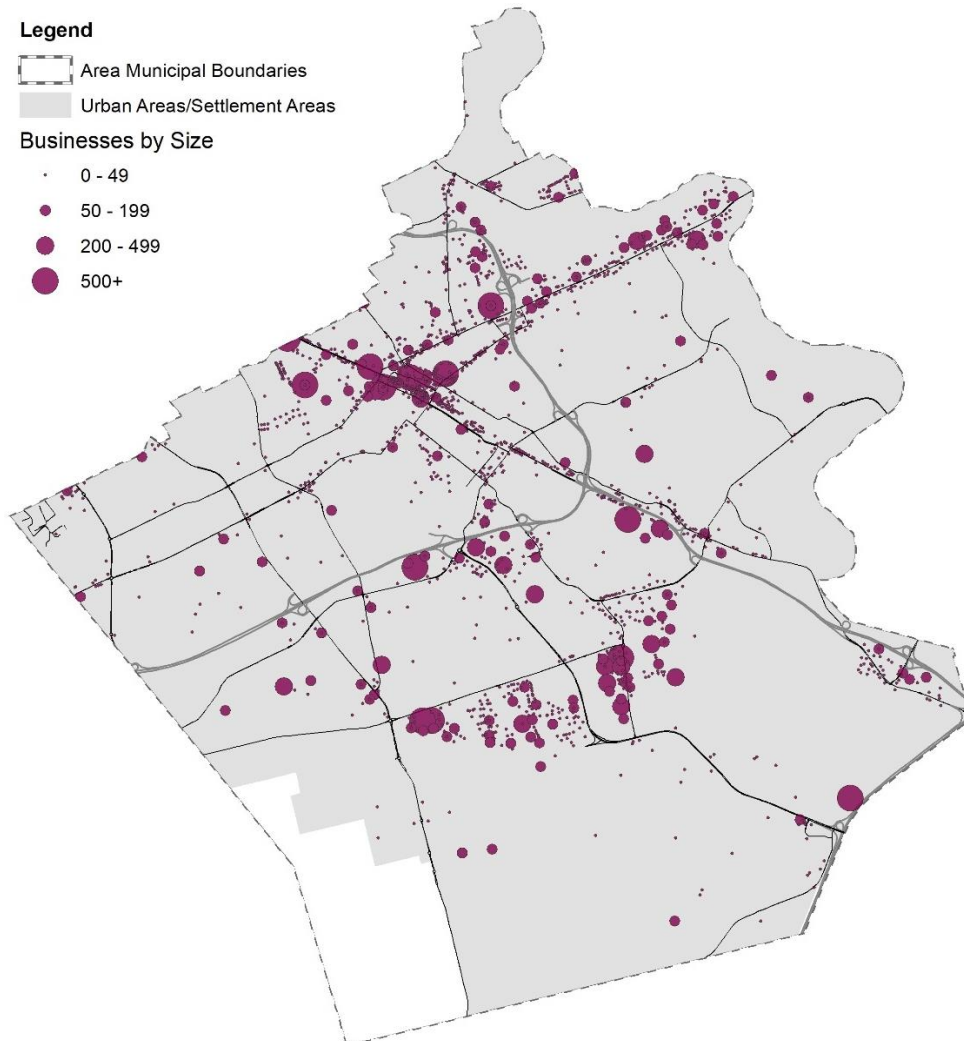
Of Kitchener's 61,500 jobs, 68% are full-time and 32% are part-time. The proportion of full-time employees in Kitchener is lower than the Regional average of 73%. This is reflective of the large share of institutional and retail sectors in Kitchener, which generally employ a higher proportion of part-time employees.



Top 10 Employment Sectors in Kitchener

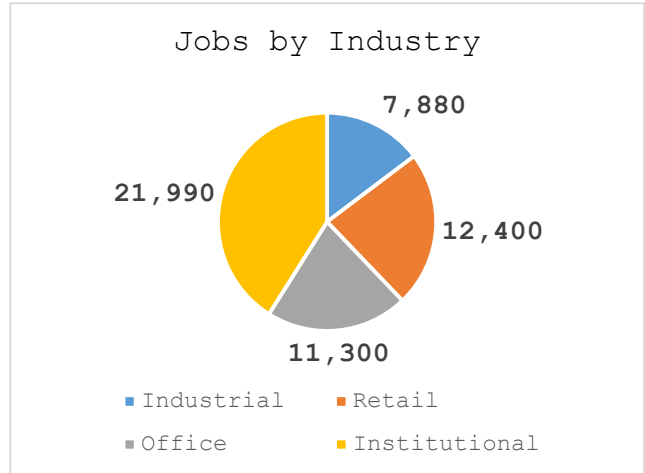
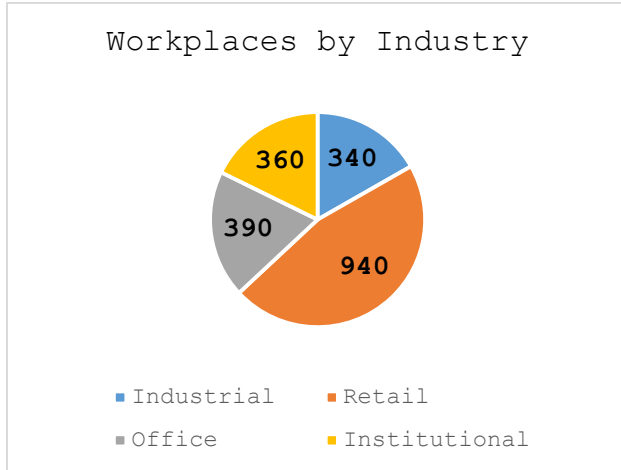


Spatial Distribution of Businesses in Kitchener



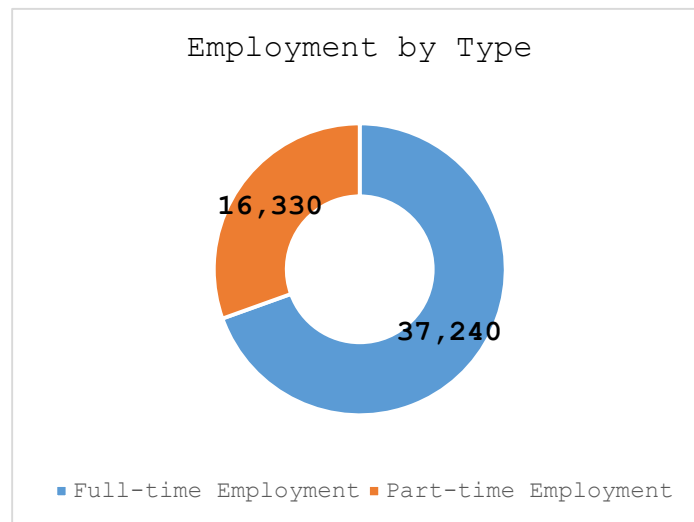
Appendix D: City of Waterloo Profile

The City of Waterloo contains over 2,000 unique workplaces, which represents 24% of the regional total. The retail sector makes up a significant portion of the city's workplaces (46%). Institutional jobs make up the bulk of employment in Waterloo (41%). Employment in the remaining sectors (retail, office, and industrial) are evenly distributed.

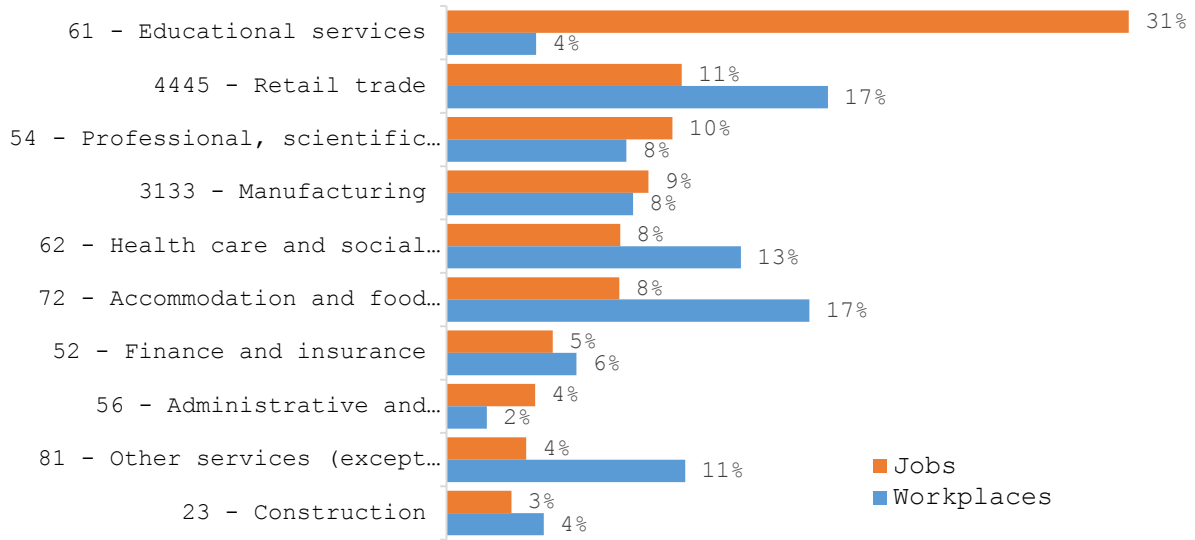


Employment by Type:

Of Waterloo's 54,000 jobs, 70% are full-time and 30% are part-time. The proportion of full-time employees in Waterloo is lower than the Regional average of 73%. This is reflective of the large share of institutional and retail sectors in Waterloo, which generally employ a higher proportion of part-time employees.



Top 10 Sectors by Employment in Waterloo



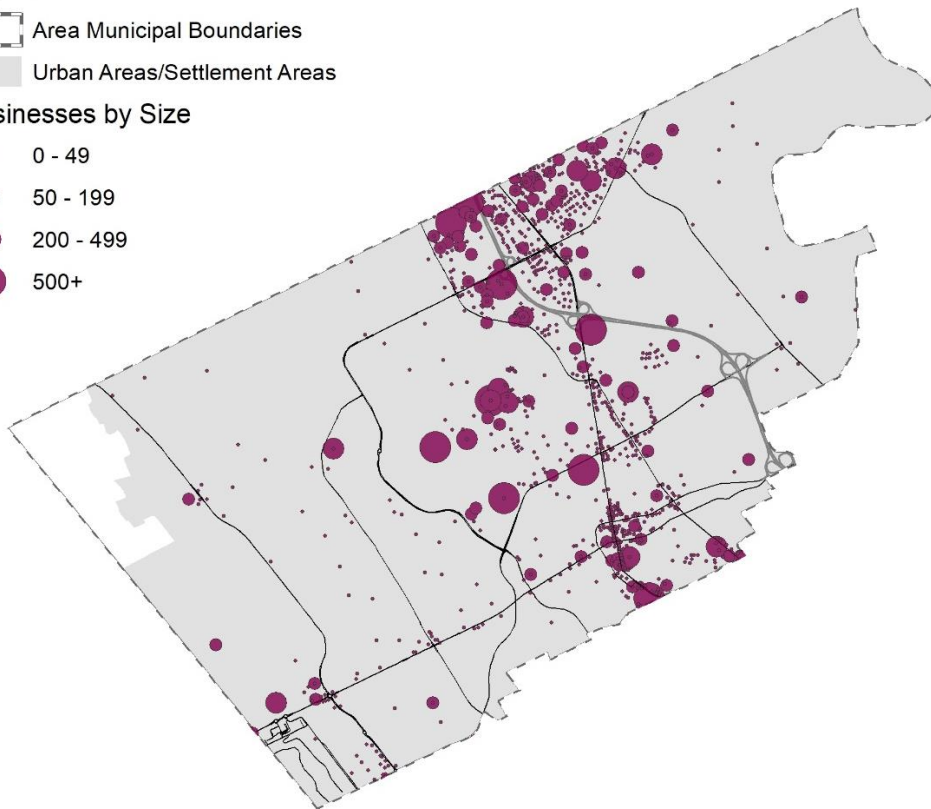
Spatial Distribution of Businesses in Waterloo

Legend

- Area Municipal Boundaries
- Urban Areas/Settlement Areas

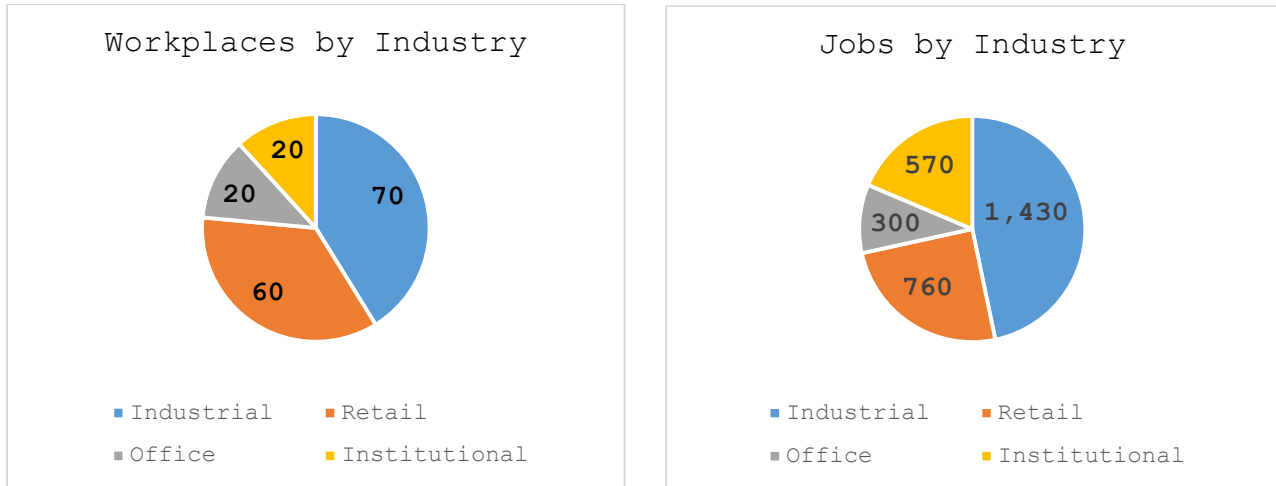
Businesses by Size

- 0 - 49
- 50 - 199
- 200 - 499
- 500+



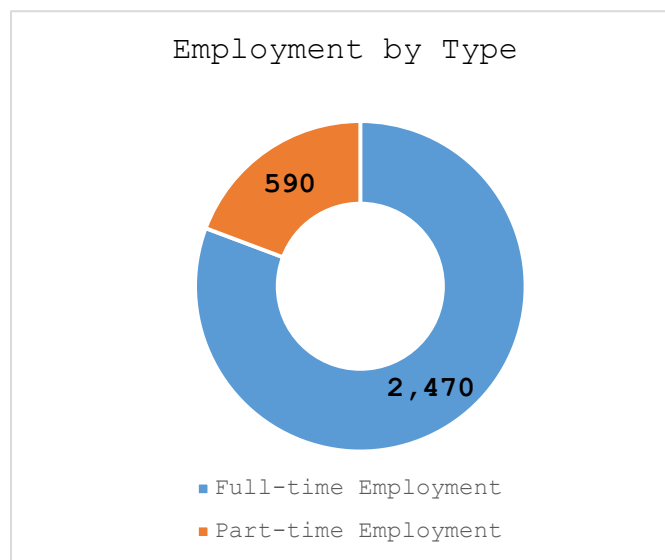
Appendix E: Township of North Dumfries Profile

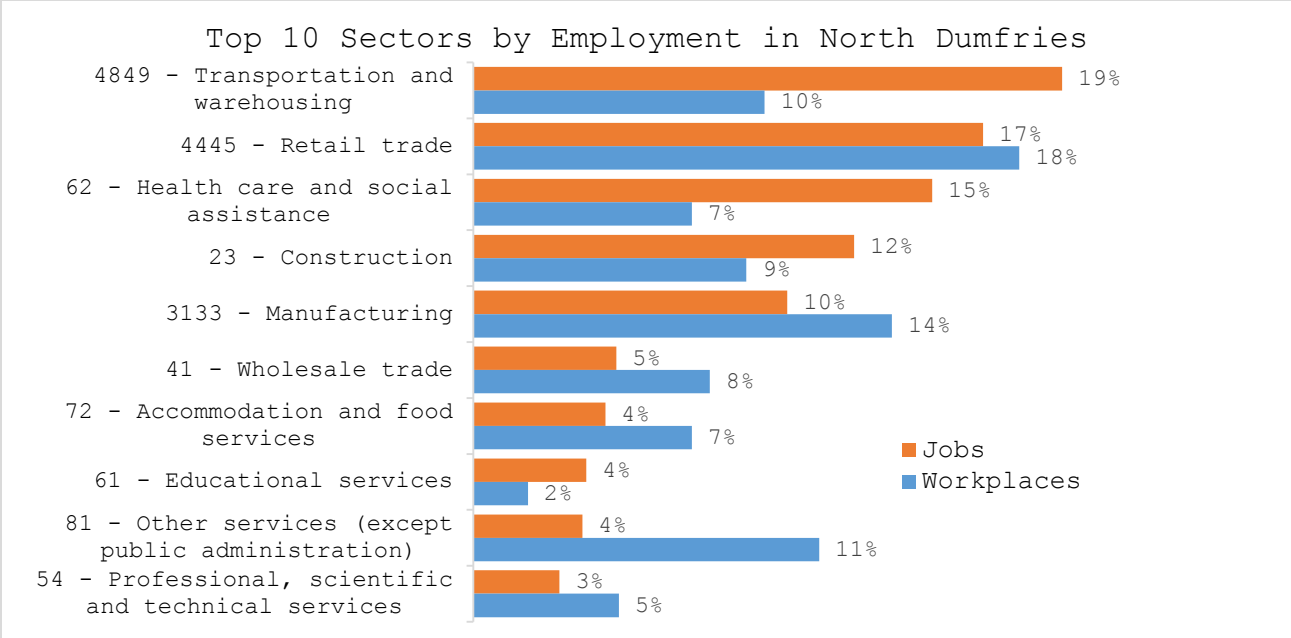
The Township of North Dumfries contains 170 unique workplaces, which represents 2% of the regional total. The industrial sector makes up a significant portion of the township's workplaces (41%). Similarly, jobs are concentrated in the industrial sector in North Dumfries.



Employment by Type:

Of North Dumfries 3,000 jobs, 81% are full-time and 19% are part-time. The proportion of full-time employees in North Dumfries is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in the township, which generally employ full-time workers.





Spatial Distribution of Businesses in North Dumfries

Legend

- Area Municipal Boundaries
- Urban Areas/Settlement Areas

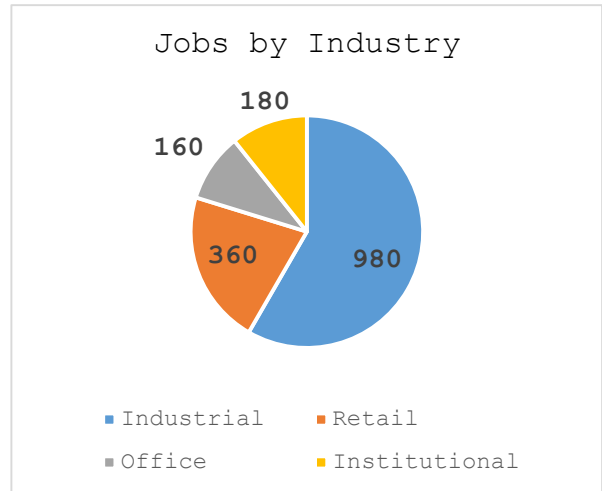
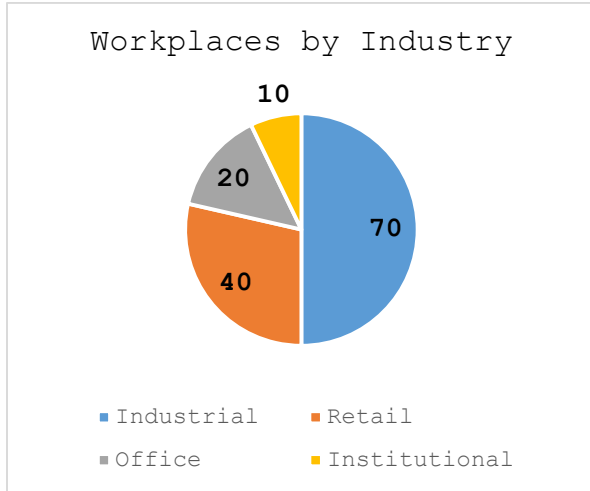
Businesses by Size

- 0 - 49
- 50 - 199
- 200 - 499
- 500+



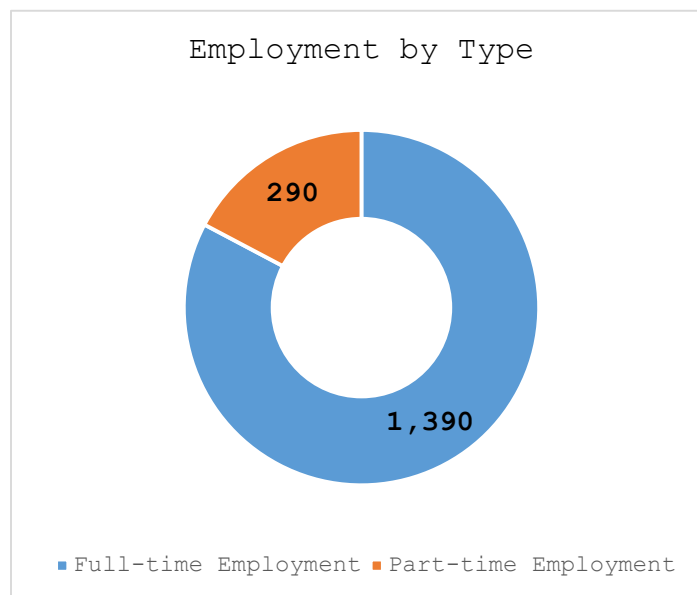
Appendix F: Township of Wellesley Profile

The Township of Wellesley contains over 140 unique workplaces, which represents 2% of the regional total. The industrial sector makes up half of the township's workplaces and employs 58% of jobs in the township. Retail is the second largest sector in the township, employing 21% of surveyed jobs.

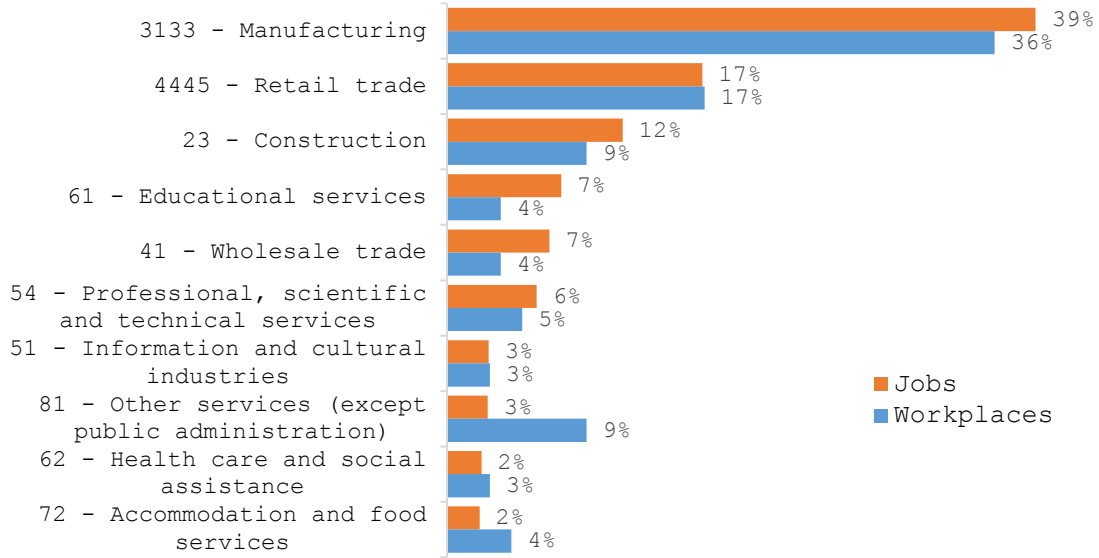


Employment by Type

Of Wellesley's 1,700 jobs, 83% are full-time and 17% are part-time. The proportion of full-time employees in Wellesley is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in the township, which generally employ full-time workers.



Top 10 Employment Sectors in Wellesley



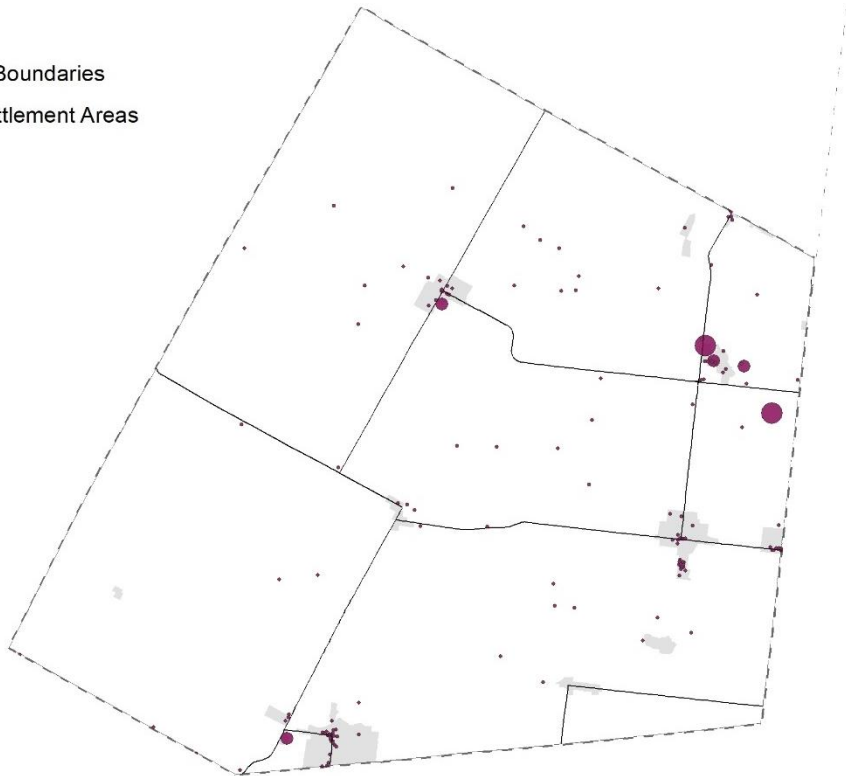
Spatial Distribution of Businesses in Wellesley

Legend

- Area Municipal Boundaries
- Urban Areas/Settlement Areas

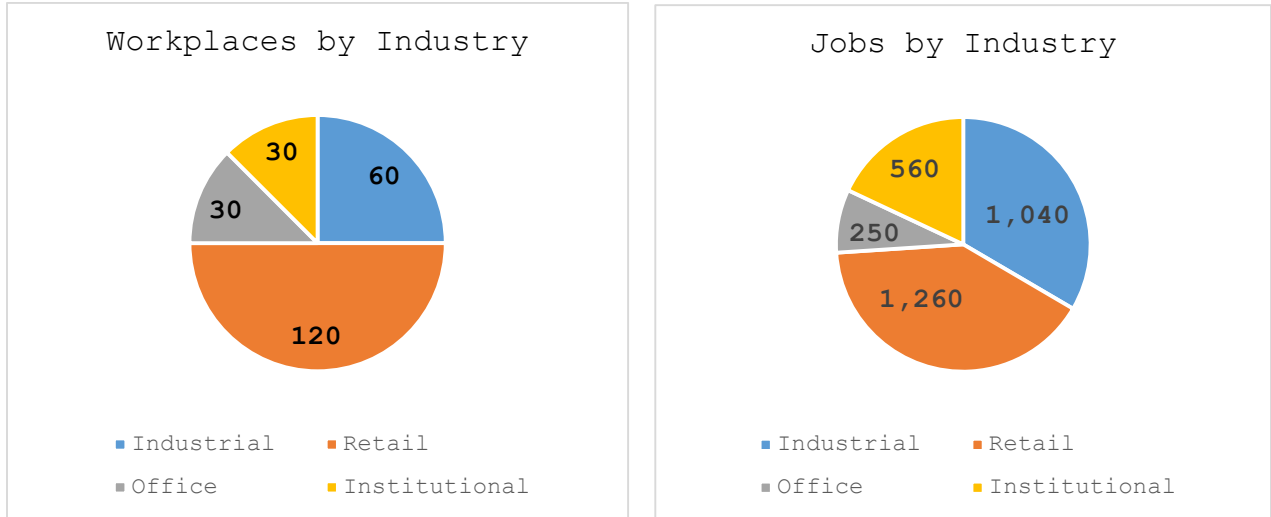
Businesses by Size

- 0 - 49
- 50 - 199
- 200 - 499
- 500+



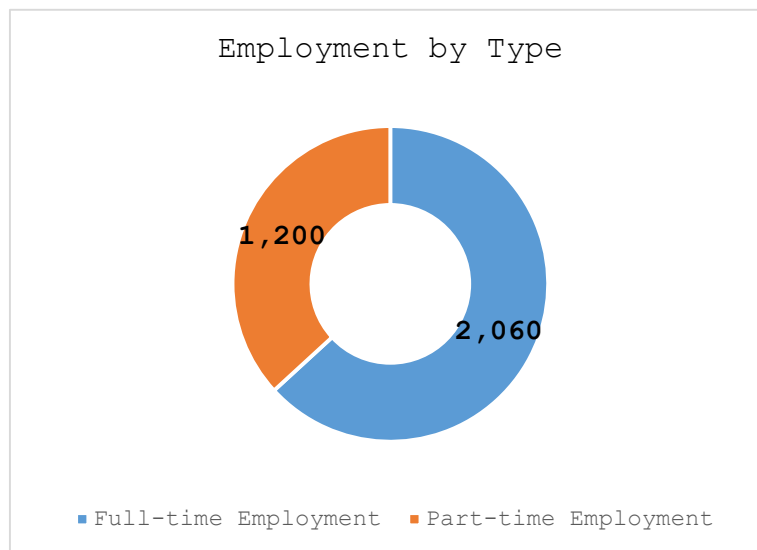
Appendix G: Township of Wilmot Profile

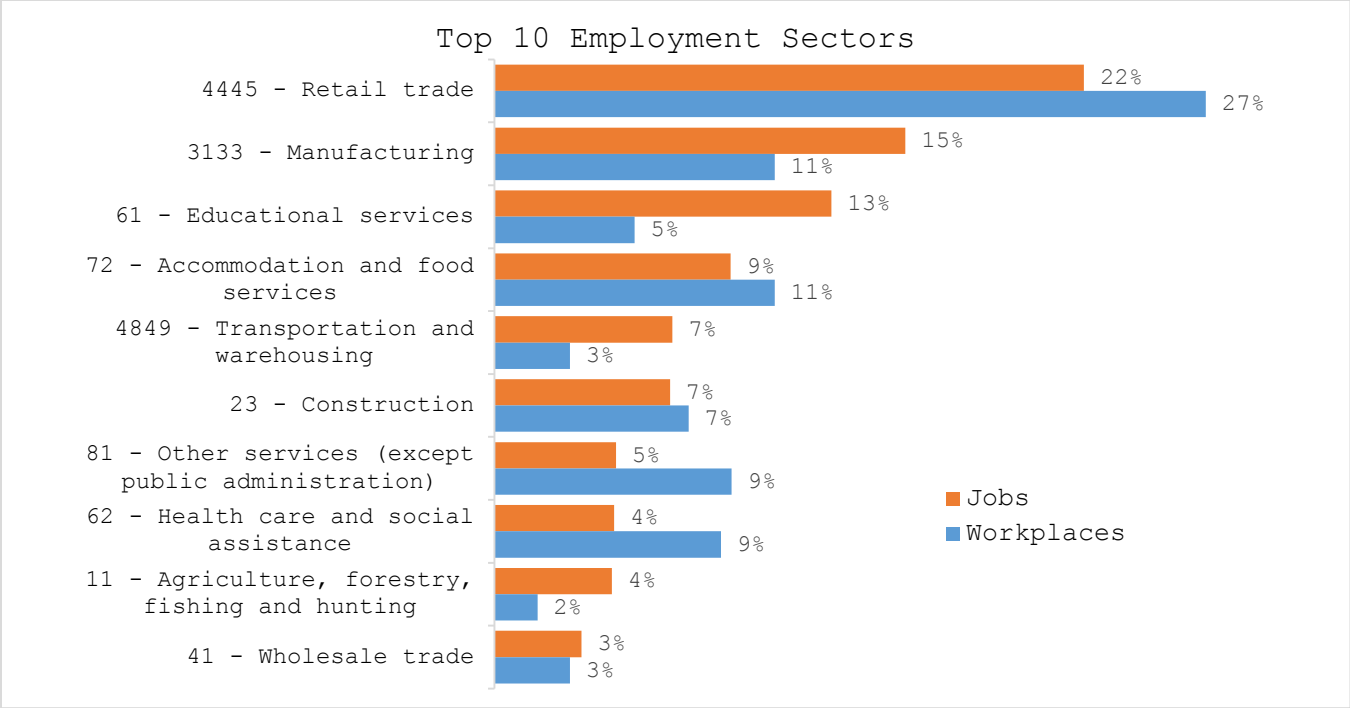
The Township of Wilmot contains over 250 unique workplaces, which represents 3% of the regional total. The retail sector makes up a significant portion of Wilmot's workplaces (50%). Similarly, retail makes up a majority of identified jobs in the township (41%). This is followed by manufacturing, which has 33% of identified jobs.



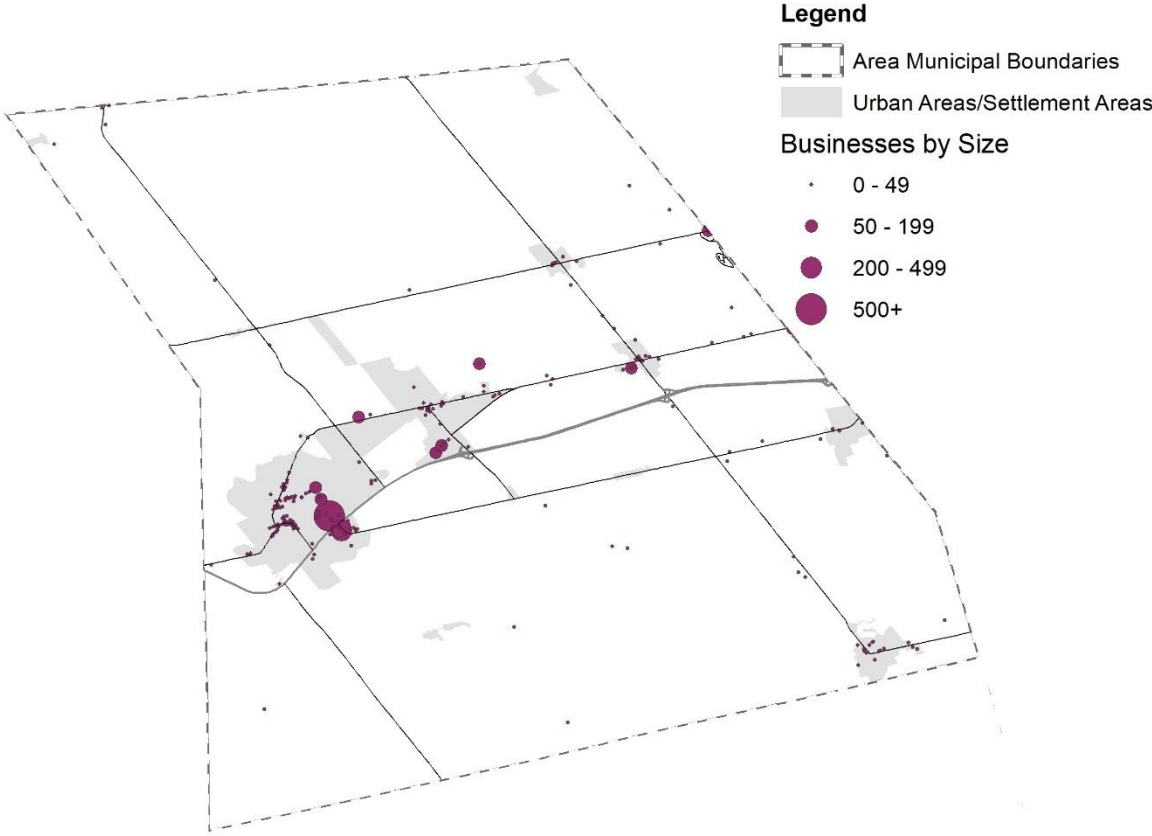
Employment by Type:

Of Wilmot's 3,200 jobs, 63% are full-time and 37% are part-time. The proportion of full-time employees in Wilmot is lower than the Regional average of 73%. This is reflective of the large share of jobs in the retail sector, which generally employ a higher proportion of part-time employees.



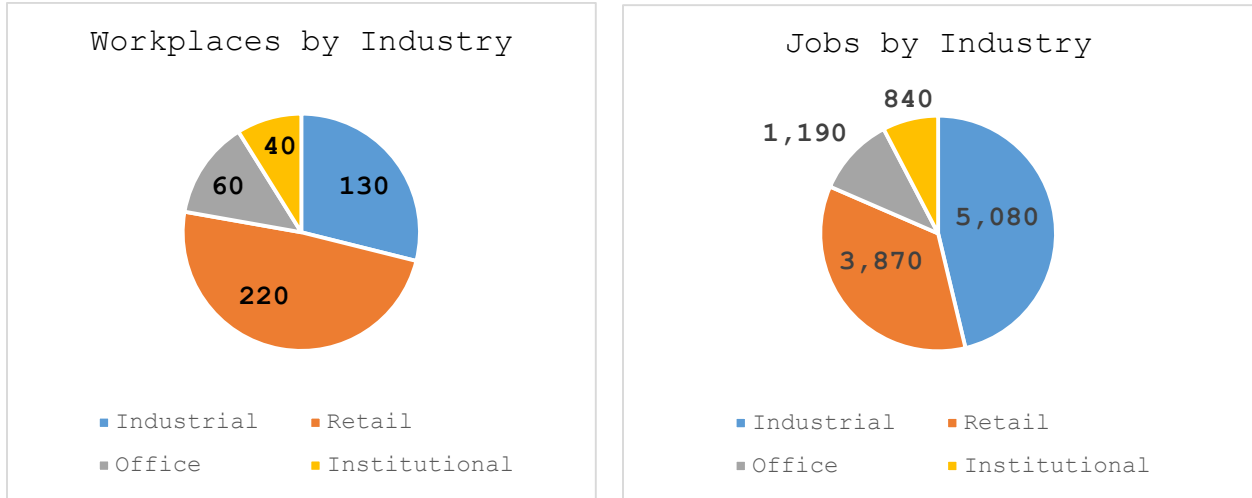


Spatial Distribution of Businesses in Wilmot



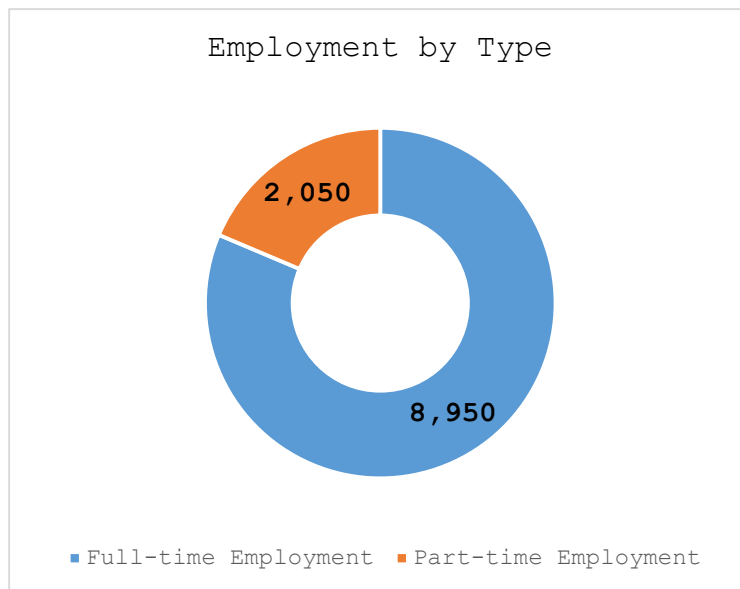
Appendix H: Township of Woolwich Profile

The Township of Woolwich contains over 460 unique workplaces, which represents 6% of the regional total. The retail sector makes up a significant portion of the city's workplaces (49%). The majority of identified jobs in Woolwich are within the manufacturing (46%), and retail (35%) sectors.

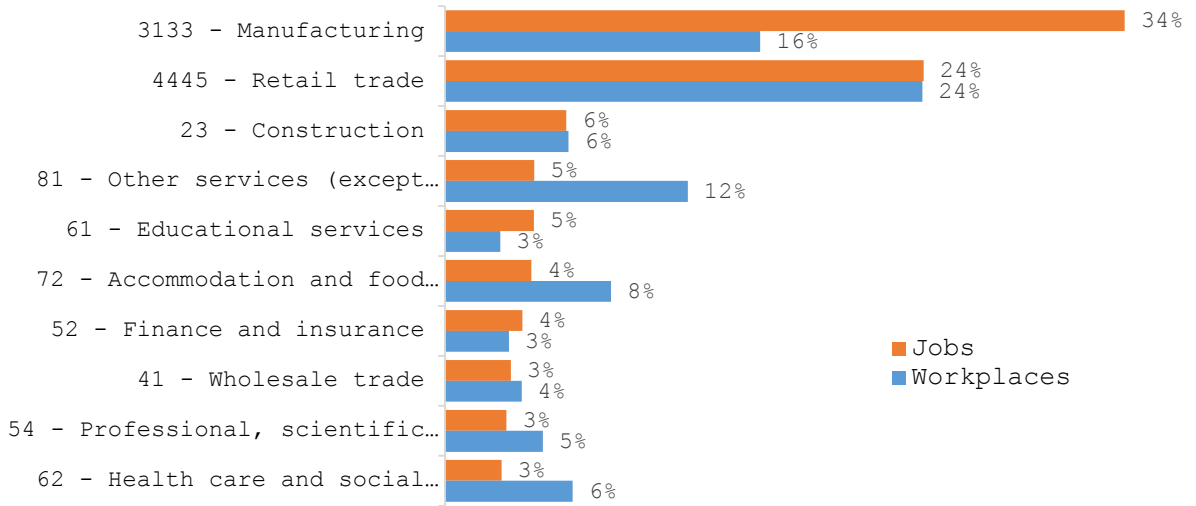


Employment by Type:

Of the 3,300 jobs in Woolwich, 81% are full-time and 19% are part-time. The proportion of full-time employees in Kitchener is higher than the Regional average of 73%. This is reflective of the large share of industrial jobs located in the township, which generally employ full-time workers.



Top 10 Employment Sectors in Woolwich



Spatial Distribution of Businesses in Woolwich

