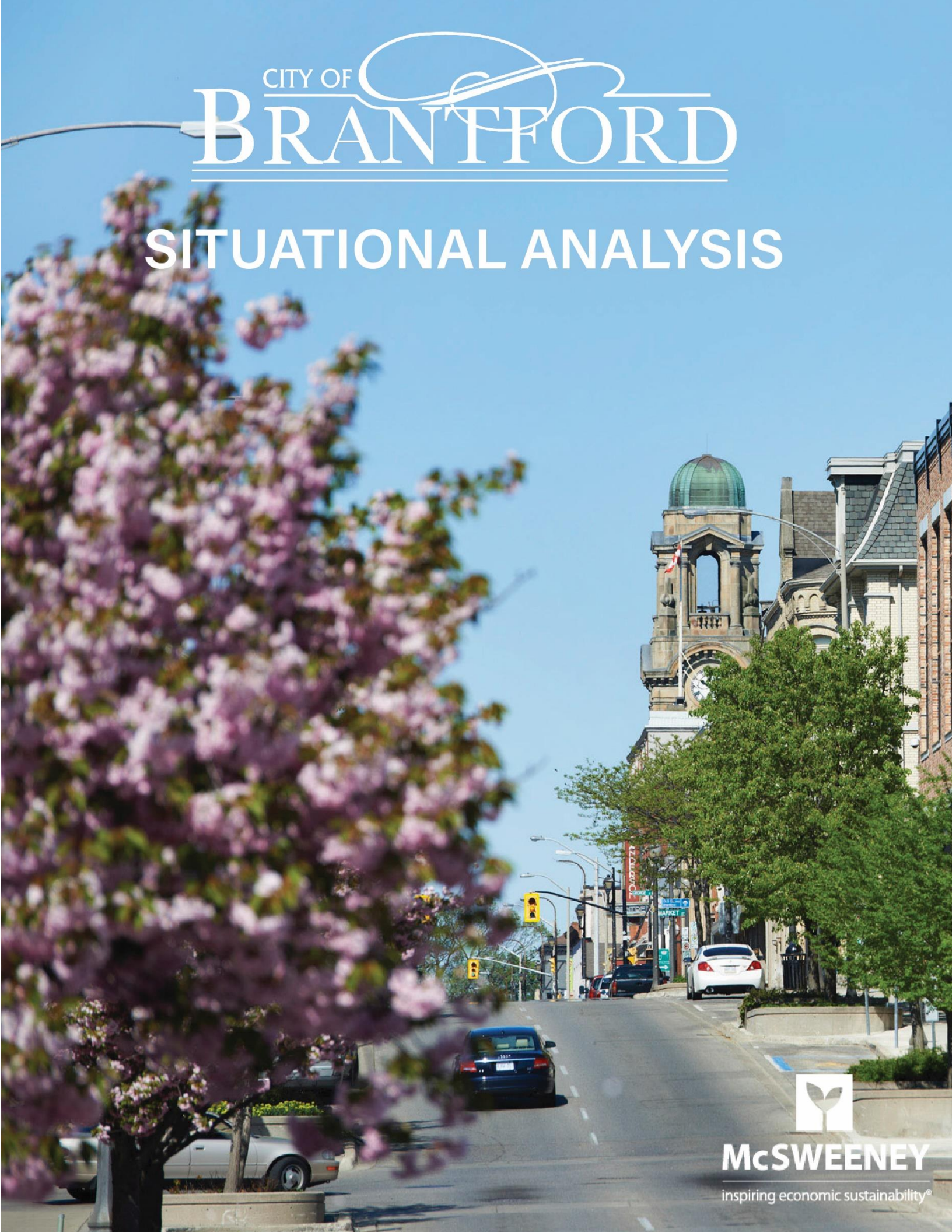


CITY OF
BRANTFORD

SITUATIONAL ANALYSIS



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SITUATIONAL ANALYSIS



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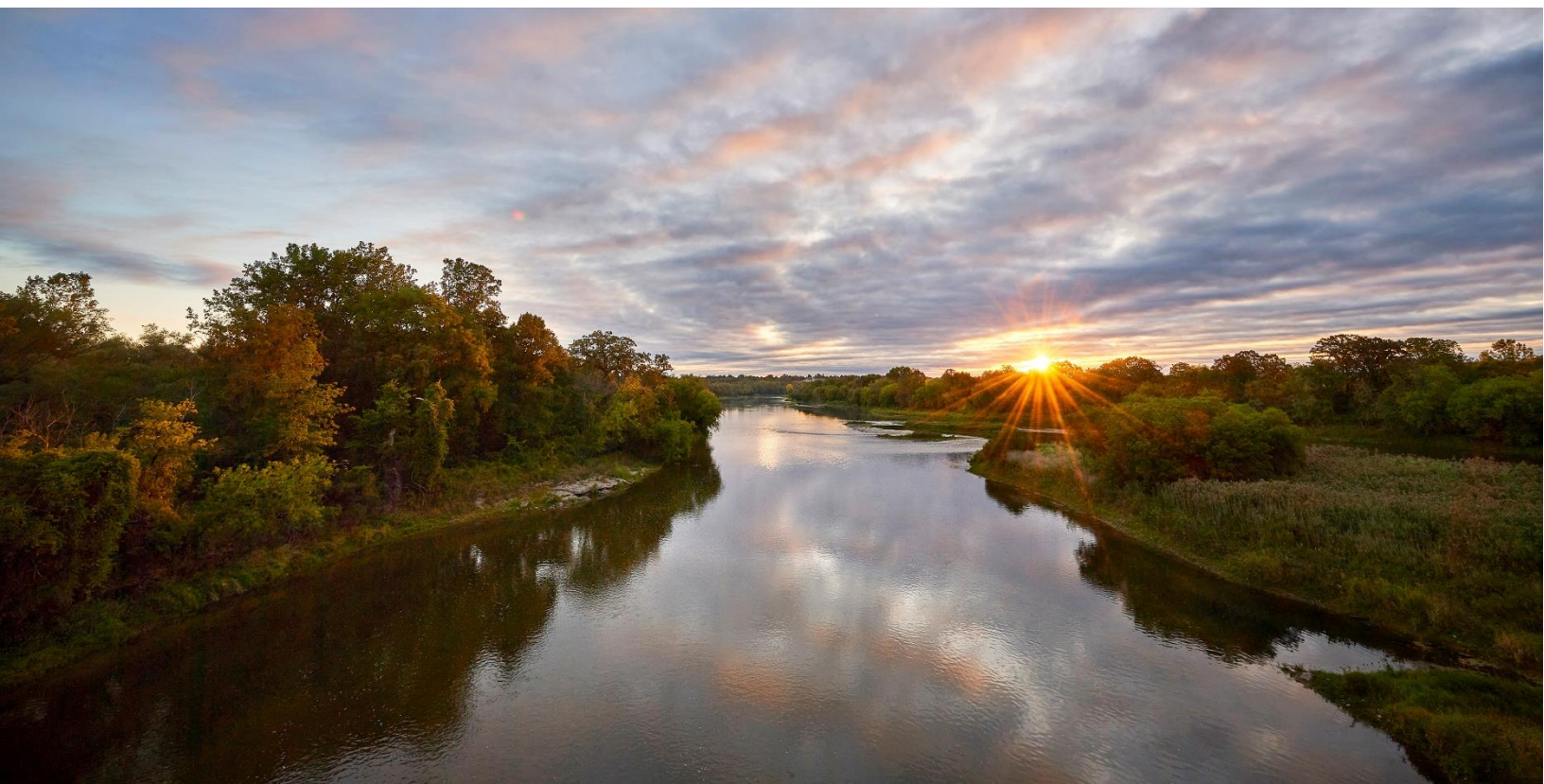
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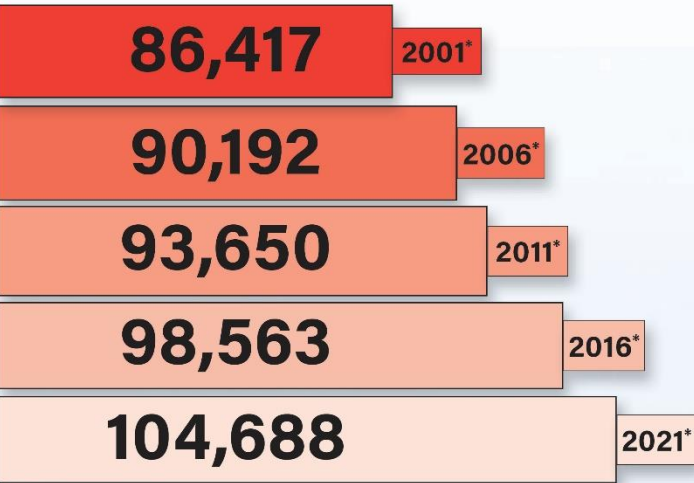
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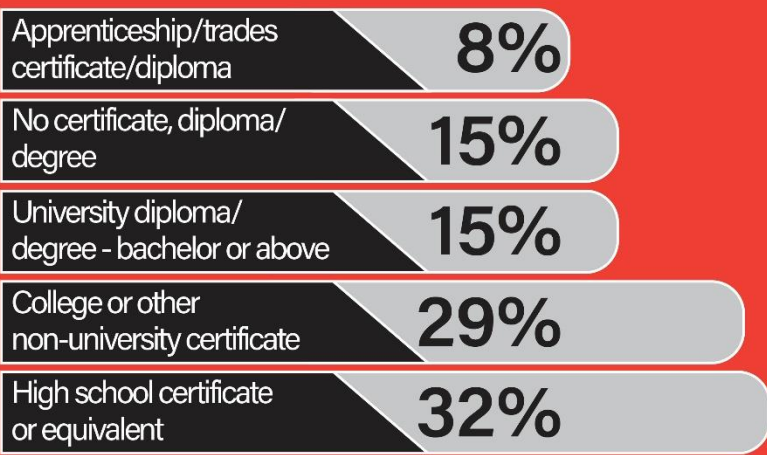




Population Profile

MEDIAN	AVERAGE
Region Age 41	Region Age 41
Ontario Age 41	Ontario Age 42

* Source: Statistics Canada Census



Highest Education

Population ages 25-64



32%
Secondary

53%
Post-secondary

Household & Earnings



26% **ONTARIO 28%**

of Brantford's population spends 30% or more of household total income on shelter costs.



Average Dwelling Value* **\$738,430**
Median Dwelling Value* **\$704,900**

* These figures are sourced from Manifold SuperDemographics and should not be compared directly to other sources, as their methodologies are different.



Total number of households
43,397

All data sourced from Manifold SuperDemographics 2022, unless otherwise specified.

Labour Force & Local Economy



* Hourly data unavailable and not directly comparable.



Top 5 Sectors by Industry**



Top 5 Sectors by Occupation**



** By labour force employment.

All data sourced from Manifold SuperDemographics 2022, unless otherwise specified.

DATA SOURCES

Please note that every effort has been made to use the most current data available. There are four major sources of information for the remainder of this document:

- The 2001 to 2021 Census from Statistics Canada.
- Canadian Business Registry (CBR) – December 2021.
- SuperDemographics 2022 from Manifold Data Mining Inc.
- EMSI Analyst 2022.Q3.

Canadian Business Registry (CBR)

The major sources of information for the business registry are updated from the Statistics Canada survey program and Canada Revenue Agency's (CRA) Business Number account files. This CRA administrative data source allows for the creation of a complete set of all business entities.

Manifold Projection Method

Production of 2022 Demographic data estimates is partially based on population statistics collected by the Statistics Canada Census Program. Manifold estimates demographic data annually, including population projections for 5 and 10 years in the future. Manifold methodologies are based on the following techniques:

- Enhanced cohort survival methods.
- Nearest neighbourhood and regression techniques.
- Structural coherence techniques.

Manifold Data sources include Statistics Canada, Health Canada, Real Estate Boards/Companies, Canadian Bankers Association, Regional Health Ministries, Bank of Canada, Citizenship and Immigration Canada, Canada Post Corporation, Regional School Boards, Consumer and business directories books, Flyer Distribution Association, Proprietary Survey and research and Publications from hospitals, CMHC, BBM and partners.

EMSI Analyst

EMSI data brings the various snapshots of the Canadian economy together in a single picture. First, it aligns the geographies of the data from 2001 to the present, which means the City of Brantford of 2001 is the same as the City of Brantford (hereafter referred to as Brantford) of 2022. This results in geographically detailed data (down to the Census Subdivision level) that apply to today's economy.

The data is remarkably detailed, providing information on 305 industry classifications using the North American International Classification System (NAICS) system and 522 occupations from Statistics Canada's National Occupational Classification (NOCs) classification system in over 4,300 integrated geographical areas. The data is updated twice a year, so users have the most current information possible. And to top it all off, it adds 10-year projections based on the CBR data so that it provides an idea of the future alongside the past and present.

EMSI Data Sources include:

- Canadian Business Registry.
- Census data (2001-2021).
- Survey of Employment, Payroll and Hours.
- Labour Force Surveys.
- Canadian Occupational Projection Systems.
- CANSIM Demographics.
- Post-secondary Student Information System.



1. DEMOGRAPHIC ANALYSIS

1.1. Population Growth

This subsection illustrates population characteristics for Brantford. The wider economic landscape relevant to the region is explored by using Ontario as a benchmark.

Table 1 illustrates population changes in Brantford from 2011 to 2032, compared to Ontario. The census population in Brantford grew quickly from 2006 to 2016 (3.8% and 5.2%) and subsequently grew even more rapidly (by 6.21%) over the ensuing five-year period, from 98,563 residents in 2016 to 104,688 in 2021. Over the next decade, Brantford's population is projected to grow at a slightly less rapid pace, but still quite aggressively, passing 120,000 residents by 2032.

Of note, the City of Brantford has also established growth plans reaching 165,000 residents by 2051 as per Schedule 3 of the Provincial Growth Plan for the Greater Golden Horseshoe. Developments and strategic decisions with regard to this growth plan may impact future projections. To that end, these population figures should not be contrasted or seen as being in disagreement with other numbers derived from other sources. Instead, the numbers presented here are merely a snapshot in time from Manifold SuperDemographics.

Table 1: Population Change, Brantford and Ontario, 2011-2032*

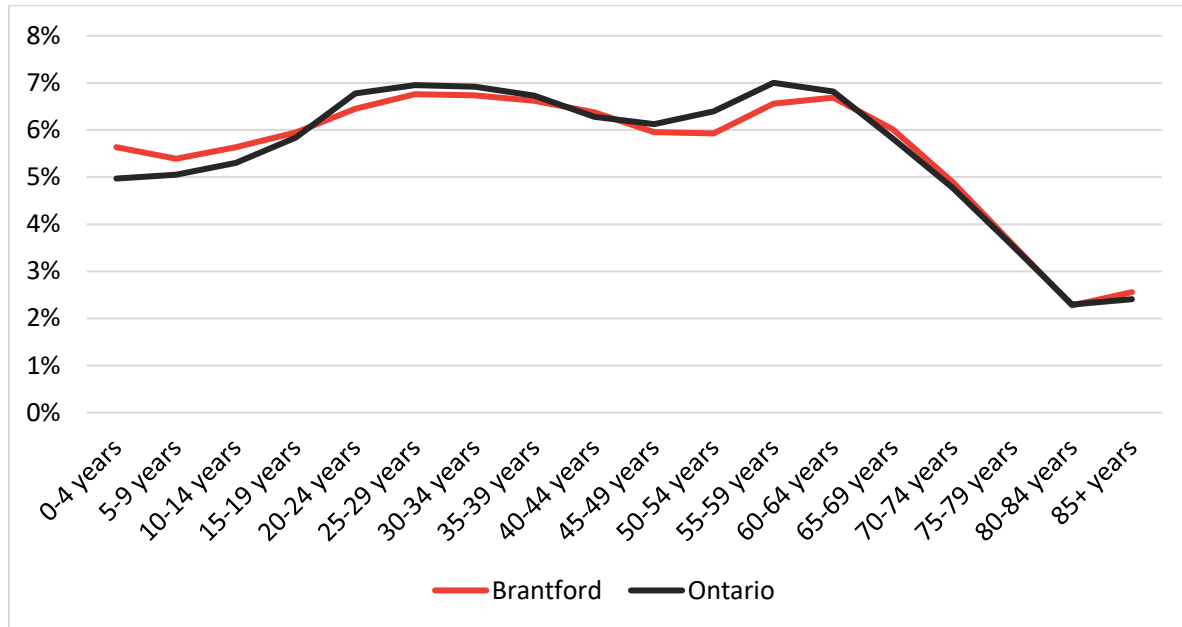
Population	2011	2016	2021	2022	2027	2032
Brantford Population Count	93,650	98,563	104,688	110,096	115,865	121,484
% Change	3.83%	5.25%	6.21%	/	5.24%	4.85%
Ontario Population Count	12,851,821	13,448,494	14,223,942	15,000,360	15,859,881	16,716,314
% Change	5.70%	4.60%	5.77%	/	5.73%	5.40%

Source: Statistics Canada Census Profiles 2011-2021; 2022-2032 Growth Manifold SuperDemographics.

*Please note that 2022-2032 uses a different data source than 2011-2021 and due to differing methodologies, these sources are not directly comparable. We, therefore, do not provide a % change for 2021-2022.

Figure 1 contrasts the age profile of residents in Brantford and Ontario, in 2022. The two geographies are very comparable, with Brantford having a *slightly* larger percentage of youth (22.6% under 14 locally, compared to 21.2% provincially), and a *slightly* smaller percentage of adults nearing retirement age (31.5% of residents in Brantford are between 40-54; 32.6% provincially). In general, Brantford’s population breakdown in 2022 is very similar to Ontario’s across all age demographics.

Figure 1: Percent Population by Age, Brantford vs. Ontario, 2022



Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022.

As noted above, Brantford’s age profile is very similar to Ontario’s. All age cohorts in Table 2 below represent very similar proportions of the population at the local and provincial levels, with no difference greater than 1.8%.

Table 2: Brantford and Ontario Age Profile Snapshot, 2022 by Age Cohort¹

2022 Age Profile Snapshot		
Age Group	Brantford	Ontario
0-14	16.7%	15.3%
15-64	64.0%	65.8%
65+	19.3%	18.8%

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022.

¹ Please note, throughout the document various totals may not add up to 100%, and subtotals may not add up to broader totals. These discrepancies are due to methodological rounding.

The median age of Brantford’s male population is younger than the female population, 39.3 compared to 42.0. This is predominantly due to a larger retirement-aged population of females (21.2%) compared to males (17.4%). Table 3 presents the breakdown of demographics by gender.

Table 3: Brantford Age Profile Snapshot, Male and Female, 2022

2022 Brantford Age Profile Snapshot		
Age Group	Male	Female
0-14	17.4%	16.0%
15-64	65.3%	62.8%
65+	17.4%	21.2%

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022.

1.2. Income, Households and Attainability

This subsection describes income, households and housing costs of the population. This information is relevant within the context of economic development planning because it provides an understanding of whether a region has attainable housing for resident labour – a key factor in residential and labour force attraction and retention. With regard to employment income, the following observations can be made²:

- In 2021, Brantford’s median employment income was \$37,686, virtually identical to Ontario (\$37,844).
- In 2021, the average employment income for Brantford residents was \$45,020, 20% lower than in Ontario (\$54,047).

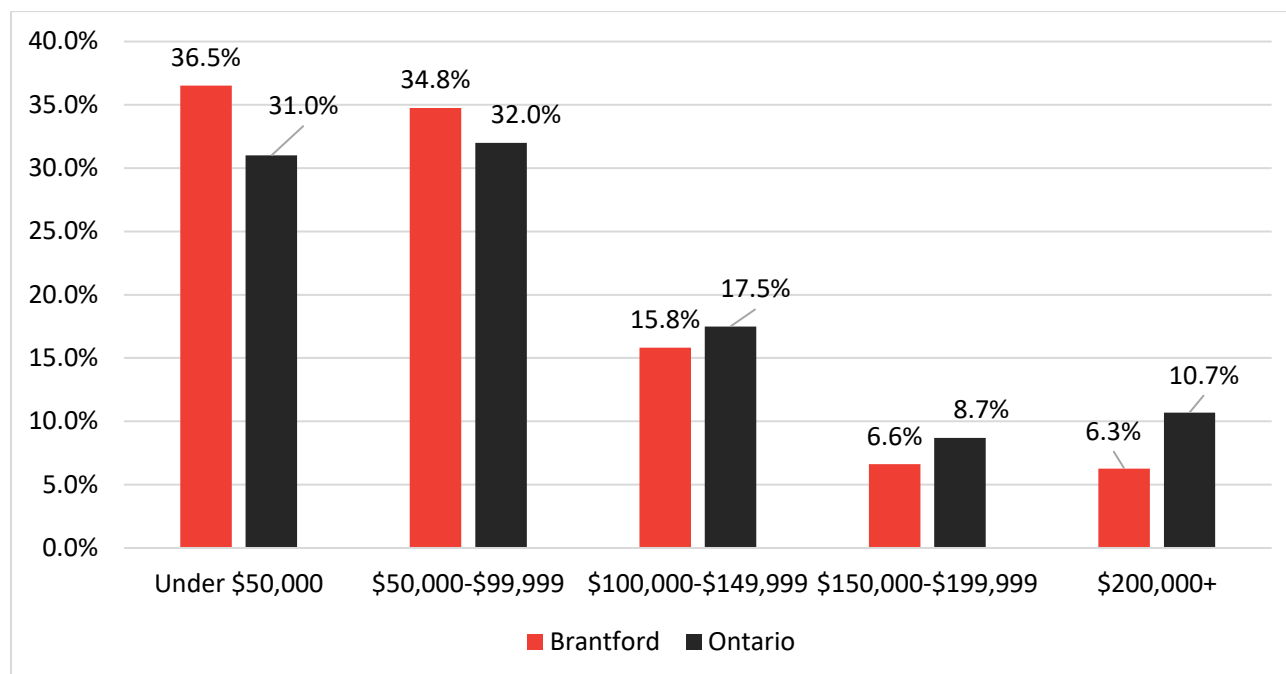
This distribution suggests that Brantford has a larger middle class compared to Ontario. That is, while the higher end of employment incomes in Ontario are higher than their Brantford counterparts (leading to a higher average), Brantford has a similar middle (median) employment income.

Figure 2 illustrates the distribution of household incomes. Approximately 71.3% of households in Brantford earn less than \$100,000, compared to 62.9% in Ontario.

- Median household total income in Brantford: \$71,974 vs. \$84,052 in Ontario.
- Average household total income in Brantford: \$87,781 vs. \$109,992 in Ontario.

² All income data uses the year previous; therefore 2022 data uses 2021 incomes.

Figure 2: Household Income Levels by Percentage of the Population, 2021



Source: Manifold Data Mining Inc. 2022 (2021 incomes).

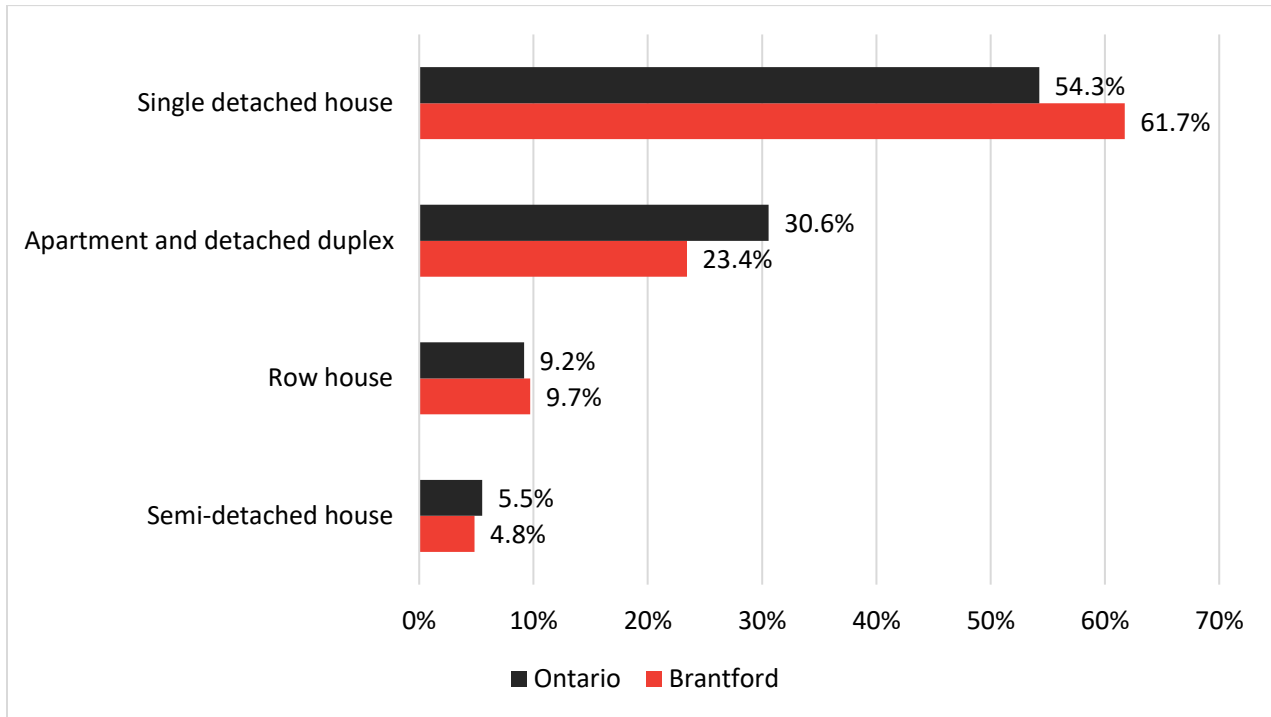
On average, the residents in Brantford have slightly lower levels of employment and household income compared to Ontario. Brantford, though, offers much more favourable costs of housing. Table 4 and Figure 3 highlight key housing characteristics. Compared to Ontario, Brantford has a much lower cost of housing and fewer residents subsequently spend over 30% of their total income on shelter costs (26% compared to 28% provincially). Brantford also sees relatively similar variety in housing stock.

Table 4: Households and Dwelling Attainability, 2022

Housing Characteristics	Brantford	Ontario
Total Number of Households	43,397	5,745,955
Average value of dwelling (\$)	\$738,430	\$1,021,430
Median value of dwellings (\$)	\$704,900	\$860,457
Average monthly shelter costs for rented dwellings (\$)	\$1,038	\$1,220
Median monthly shelter costs for rented dwellings (\$)	\$1,004	\$1,108
% of households owned	68%	70%
% of households rented	32%	30%
Average number of persons in private households	2.48	2.57
Population spending 30% or more of household total income on shelter costs	26%	28%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022.

Figure 3: Occupied Dwellings by Structure Type, 2022



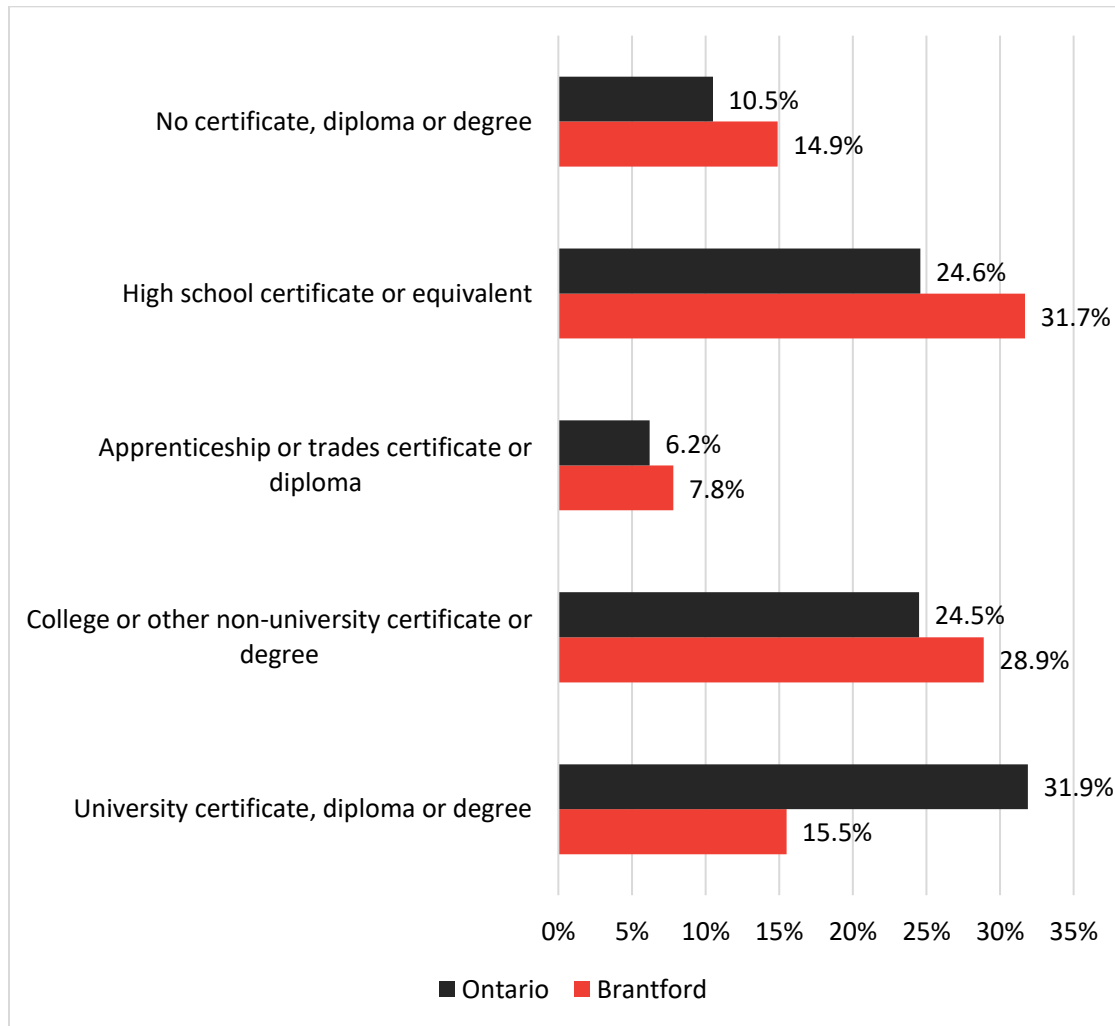
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022.



1.3. Education, Skills and Training

This subsection reviews the level of education and major fields of study for residents of Brantford and Ontario. Figures 4 and 5 outline the education levels obtained by Brantford residents ages 25-64, as compared to Ontario. Definitions may be found in the footnote.

Figure 4: Educational Attainment Breakdown, Residents Ages 25 to 64, 2022³



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022.

³ 'High school diploma or equivalent' includes persons who have graduated from a secondary school or equivalent. It excludes persons with a post-secondary certificate diploma or degree.

'Post-secondary certificate diploma or degree' includes 'apprenticeship or trades certificates or diplomas' 'college CEGEP or other non-university certificates or diplomas' and university certificates diplomas and degrees.

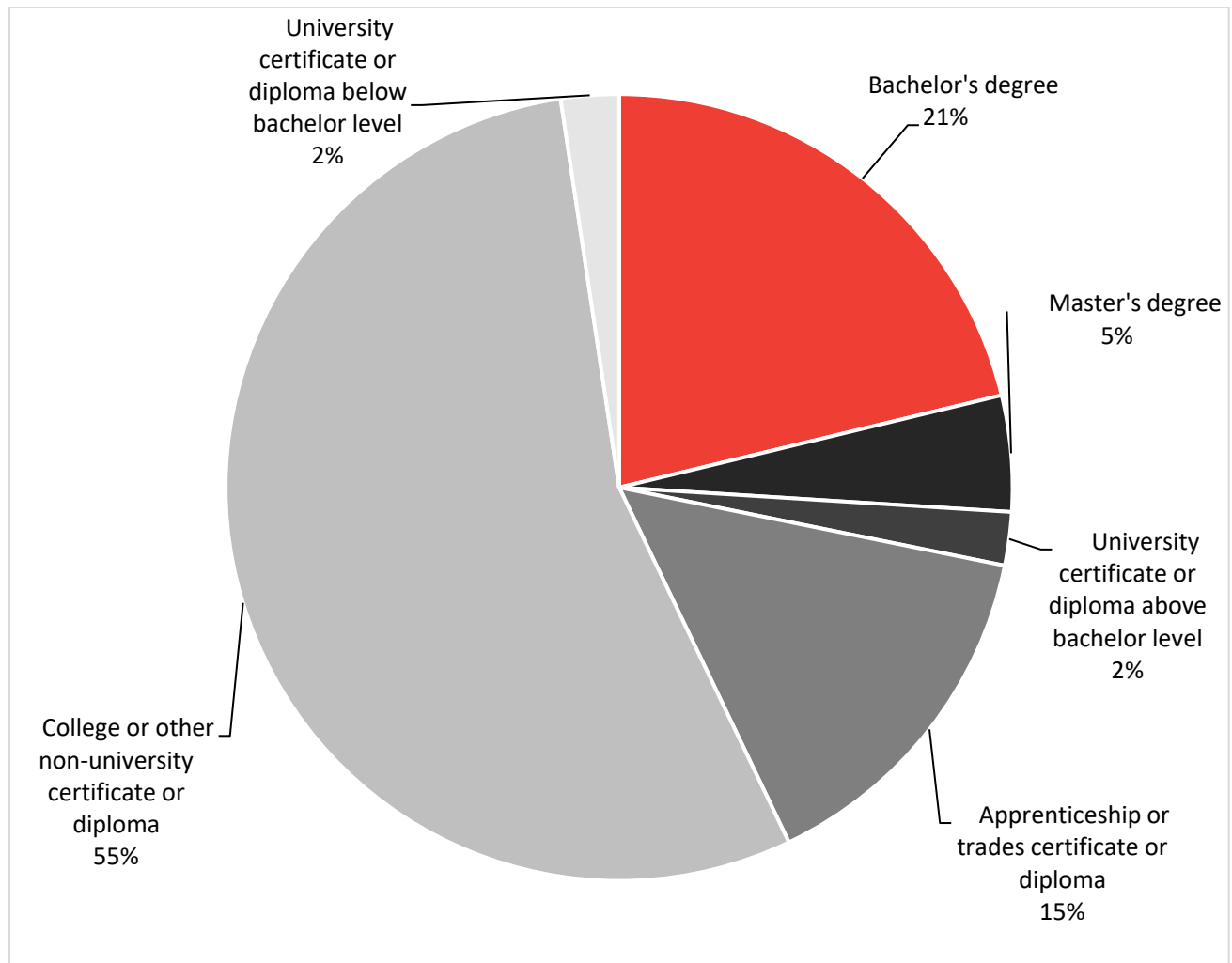
'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates.

'University certificate diploma or degree includes the categories 'University certificate or diploma above bachelor level' 'Degree in medicine dentistry veterinary medicine or optometry' 'Master's degree' and 'Earned doctorate.'

Figure 5 illustrates the post-secondary educational attainment of Brantford residents ages 25 to 64. Based on Figure 5, it can be concluded that:

- A total of 30,348 residents aged 25 to 64 have post-secondary education.
- A college degree is the most common type of education; attained by 54% (attained by 16,433 residents) of residents with a post-secondary education, aged 25 to 64.

Figure 5: Percentage of Residents Aged 24- 65 with Post-Secondary Attainment, 2022



Source: McSweeney & Associates from Manifold SuperDemographics 2022.

Table 5 illustrates the major fields of study⁴ for all residents 15 years and older (data is only available for the entire population 15 years and older, so the data is not comparable to previous education tables and figures). It is collected for the highest certificate, diploma or degree above the secondary school level. The largest field of study in the population is 'Health professions and related programs'; and 'Business, management, marketing and related support'.

Table 5: Post-Secondary Major Field of Study, Brantford, 2022

Classification of Instructional Programs (CIP)	Total	Female	Male
Total	91,753	47,284	44,470
No postsecondary certificate, diploma or degree	48,547	24,057	24,490
Health professions and related programs	7,029	6,111	918
Business, management, marketing and related support services	6,668	4,159	2,510
Education	2,649	1,950	698
Mechanic and repair technologies/technicians	2,386	38	2,349
Engineering technologies and engineering-related fields	2,113	148	1,965
Personal and culinary services	1,850	1,365	485
Precision production	1,696	61	1,635
Construction trades	1,515	53	1,462
Visual and performing arts	1,451	828	623
Social sciences	1,378	791	588
Family and consumer sciences/human sciences	1,349	1,189	160
Security and protective services	1,183	364	819
Public administration and social service professions	1,169	945	223
Engineering	1,008	171	837
Computer and information sciences and support services	976	386	590
Liberal arts and sciences, general studies and humanities	792	515	277
Parks, recreation, leisure and fitness studies	657	405	252
Psychology	632	520	112
Transportation and materials moving	605	99	505
Legal professions and studies	592	397	195
Agriculture, agriculture operations and related sciences	571	288	284
Physical sciences	511	215	296
English language and literature/letters	507	389	118
Biological and biomedical sciences	473	213	259
Communication, journalism and related programs	371	204	168
Biological and physical sciences	370	199	172
History	356	204	152
Communications technologies/technicians and support services	330	99	231
Architecture and related services	327	36	291
Theology and religious vocations	311	156	155
Natural resources and conservation	303	114	189
Mathematics and statistics	222	86	136

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022.

⁴ 'Major Field of study' is defined by Classification of Instructional Programs (CIP) 2016 for the population aged 15 years and over in private households: www.statcan.gc.ca/concepts/classification-eng.htm.

2. LABOUR FORCE PROFILING & ANALYSIS

2.1. Key Indicators

Brantford has a labour force of 61,547 individuals. Brantford has higher participation and employment rates relative to Ontario, with a lower unemployment rate.

These figures suggest that Brantford residents are slightly more engaged in the labour force than their provincial counterparts (participation and employment rates) and are finding work more easily (unemployment rate), all positive indicators. Table 6 outlines the key labour force statistics by gender.

Table 6: Key Labour Force Statistics by Gender, Brantford, 2022

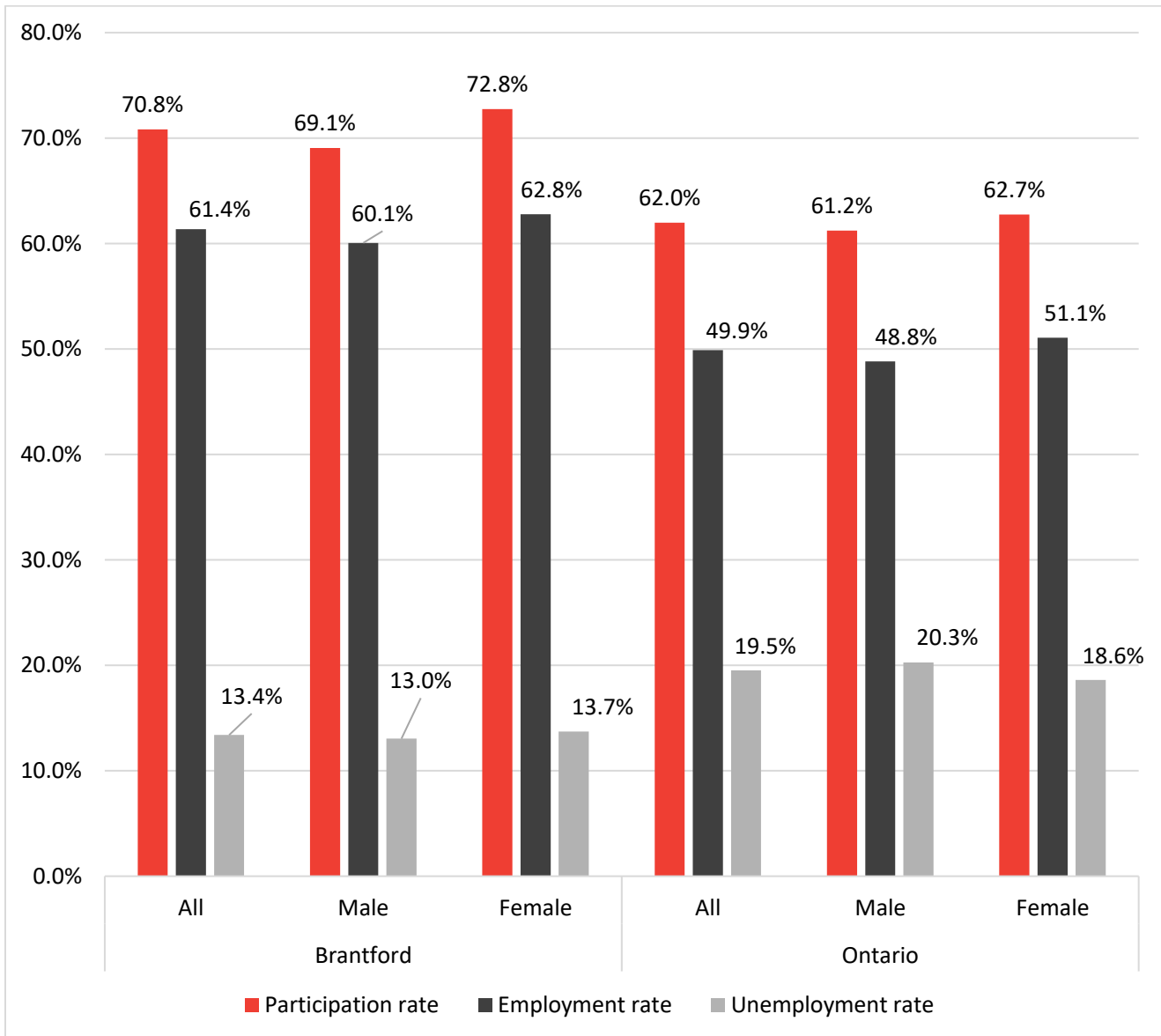
Labour Force Activity	Brantford			Ontario		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	91,753	44,470	47,284	12,701,375	6,183,030	6,518,345
In the labour force	61,547	31,689	29,859	8,275,729	4,284,717	3,991,011
Employed	57,300	29,807	27,493	7,521,911	3,912,075	3,609,836
Unemployed	4,248	1,882	2,366	753,818	372,643	381,175
Not in the labour force	30,206	12,781	17,425	4,425,647	1,898,313	2,527,334
Participation rate %	67.1	71.3	63.2	65.2	69.3	61.2
Employment rate %	62.5	67.0	58.2	59.2	63.3	55.4
Unemployment rate %	6.9	5.9	7.9	9.1	8.7	9.6

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022.



Key labour force indicators can be further broken down by age and gender and used to highlight underemployed/underutilized labour groups. Brantford has a very engaged youth with a much higher participation rate locally (70.8%) than provincially (62.0%). Moreover, the unemployment rate for youth in Brantford (13.4%) is considerably lower than their provincial counterparts (19.5%), suggesting that youth in Brantford who are looking for work can find suitable employment much easier than youth across Ontario.

Figure 6: Labour Force Statistics by Gender, Population 15 to 24, 2022



Source: Manifold SuperDemographics 2022.

Table 7 illustrates labour force characteristics for youth (15 to 24) and mature adults (25 and older) in Brantford, benchmarked against Ontario data.

Table 7: Labour Force Characteristics by Age and Gender, 2022

	Population 15 to 24 years old:					
	Brantford			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	70.8	69.1	72.8	62.0	61.2	62.7
Employment rate (%)	61.4	60.1	62.8	49.9	48.8	51.1
Unemployment rate (%)	13.4	13.0	13.7	19.5	20.3	18.6
	Population 25 years and over:					
	Brantford			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	66.4	71.7	61.6	65.7	70.8	61.0
Employment rate (%)	62.6	68.3	57.4	60.9	66.0	56.1
Unemployment rate (%)	5.7	4.7	6.8	7.4	6.8	8.0

Source: Manifold SuperDemographics, 2022.

2.2. Labour Supply in Brantford

Persons in the labour force can be classified using the National Occupational Classification (NOCs) codes, a four-tiered hierarchical arrangement of occupational groups with successive levels of disaggregation. It contains broad occupational categories (1-digit), major (2-digit code), minor (3-digit code) and unit groups (4-digit code).

Figure 7 shows that Brantford residents most commonly work in:

- Sales and service occupations.
- Trades, transport and equipment operators and related occupations.
- Business, finance and administration occupations.
- Occupations in education, law and social, community and government services.

Figure 7: Resident Labour Force by Occupation, 1-digit NOCs, 2022



Source: Manifold SuperDemographics 2022.

The number of part-time and full-time workers also helps identify potential labour force engagement and supply. As seen in Table 8, in Brantford, 54.2% of employed individuals typically worked full-time while 45.8% worked part-time. This is slightly more than all of Ontario where 52.5% of individuals typically worked full-time and 47.4% worked part-time.

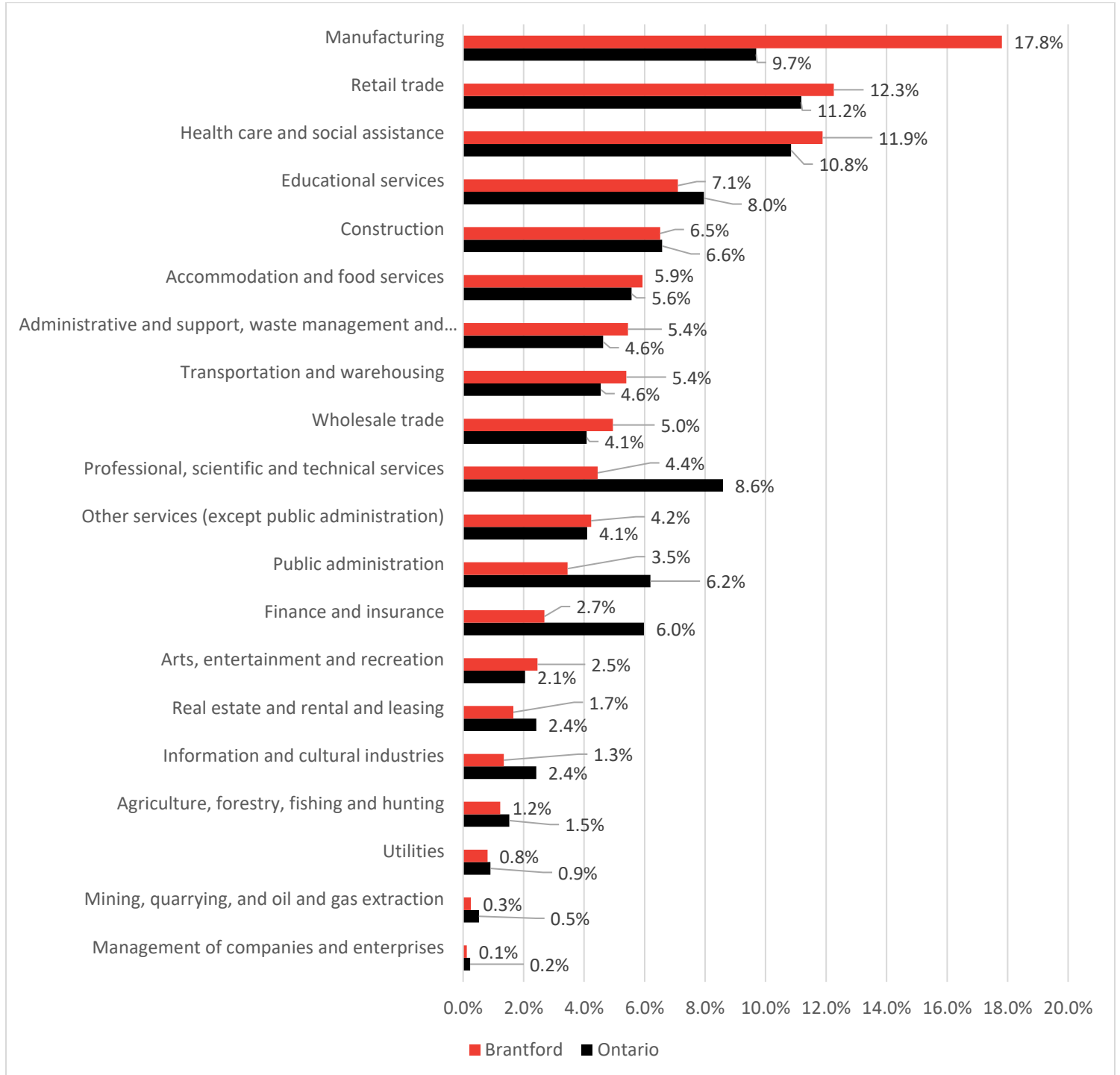
Table 8: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2022

Status	Brantford	Brantford %	Ontario %
Full-Time	32,666	54.2%	52.5%
Part-Time	27,657	45.8%	47.5%

Source: Manifold SuperDemographics 2022.

Figure 8 illustrates the supply of labour that Brantford residents provide for specific sectors. Brantford has larger labour concentrations relative to Ontario in several sectors, but most prominently in manufacturing, where the concentration locally is almost double the provincial figure (17.8% compared to 9.7%). Concentrations are explored in-depth in section 3.4.

Figure 8: Labour Force by Industry, 2022



Source: Manifold SuperDemographics 2022.

2.3. Workforce Commuting Flow

This subsection aims to identify the most probable labour force recruitment area for Brantford using commuting patterns. Tables 9 and 10 show commuting flows for persons reporting a “usual place of work” or “place of residence” in Brantford, and reveal the following trends regarding labour force commuting:

- The top three areas that Brantford supplies labour to are Hamilton, County of Brant and Cambridge.
- Brantford exports approximately 37% of its resident labour with a usual place of work.
- Top recruitment areas for Brantford are County of Brant, Hamilton and Norfolk County.
- Brantford imports 36% of its total workforce with a usual place of work.

Table 9: Top Places to Work for Brantford Residents, 2021

Place of Work	Total	Male	Female
Brantford	20,470	9,695	10,780
Hamilton	3,200	1,840	1,360
County of Brant	2,950	1,605	1,340
Cambridge	1,315	910	405
Woodstock	595	440	150
Burlington	540	275	260
Mississauga	390	265	125
Norfolk County	385	160	230
Haldimand County	375	205	170
Toronto	360	215	140
Oakville	290	165	125
Kitchener	220	140	85
Guelph	170	105	65
Brampton	145	95	45
North Dumfries Township	115	90	25
Waterloo	115	65	45
Milton	110	70	35
London	100	75	20
Total residents with a usual place of work	32,260	16,700	15,480
# of residents working outside of Brantford	11,790	7,005	4,700
% of residents working outside of Brantford	37%	42%	30%

Source: Statistics Canada, Commuting Flows Tables 2021.

Table 10: Top Labour Recruitment Areas for Brantford (Total Individuals with a Place of Work in Brantford)⁵

Place of Residence	Total	Male	Female
Brantford	20,470	9,695	10,780
Brant	3,435	1,630	1,805
Hamilton	2,380	1,390	990
Norfolk County	1,770	925	845
Cambridge	965	500	460
Haldimand County	475	250	220
Woodstock	395	195	200
Kitchener	385	260	125
Burlington	290	190	100
Norwich	120	65	50
Mississauga	105	80	25
Individuals with a place of work in Brantford	32,095	15,960	16,080
# of people working inside Brantford who live outside of Brantford	11,625	6,265	5,300
% of people working inside Brantford who live outside of Brantford	36%	39%	33%

Source: Statistics Canada, Commuting Flows Tables 2021.

⁵ **There are three important pieces to keep in mind when assessing the data:**

- 1) This information is from the 2021 Census from Statistics Canada. The numbers should not be directly contrasted with either Manifold or EMSI Analyst data, as they are from distinct years and reflect differing methodologies.
- 2) This data is representative of a snapshot in time of when the Census was taken (spring/early summer 2021). As such, commuting data was impacted by the pandemic, leading to a decrease in residents with a “usual place of work”. These numbers are valuable as relative measures (i.e., noting communities that supply/recruit the most labour to/from Brantford. However, they likely undercount the total number of commuters to each community (including locally).
- 3) These numbers are representative of only those people with a usual place of work. Therein, there will be fewer total individuals reflected here because self-employed folks with no physical location, those working from home, or those with hybrid/varied workplaces will not be counted.

2.4. Labour Recruiting Area: Emerging and in-Demand Occupations

This subsection outlines trends about the occupations employed within Brantford's labour recruiting area, regardless of where workers live. The objective is to understand which occupations are concentrated, growing and emerging, and could possibly be leveraged to drive local growth. For the purposes of this report, Brantford's possible recruiting area consists of areas within a hypothetical commuting distance and supply at least 1% of their labour force into Brantford. Those areas are:

- Hamilton.
- Haldimand County.
- Norfolk County.
- County of Brant.
- Brantford.
- Cambridge.
- Norwich.
- Woodstock.

Examining occupation by location will help discern whether there is a concentration of talent/skills and that, in turn, will help identify the industries that are potentially likely to flourish as a result of those skills being available. The occupations are analyzed at the four-digit National Occupation Classification⁶, the most disaggregated level. Tables and charts in this subsection illustrate the following:

- Occupations with a large number of jobs in 2022.
- Occupations with a large percentage of job growth between 2017-2022.
- Occupations that are concentrated in labour shed relative to the rest of Ontario and Canada.



⁶ National Occupation Classification: <https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/express-entry/eligibility/find-national-occupation-code.html>

Table 11 begins with a breakdown of jobs by occupation within the labour recruitment area, and profiles job change from 2017 to 2022. The table presents occupations ranked in order by 2017 jobs.

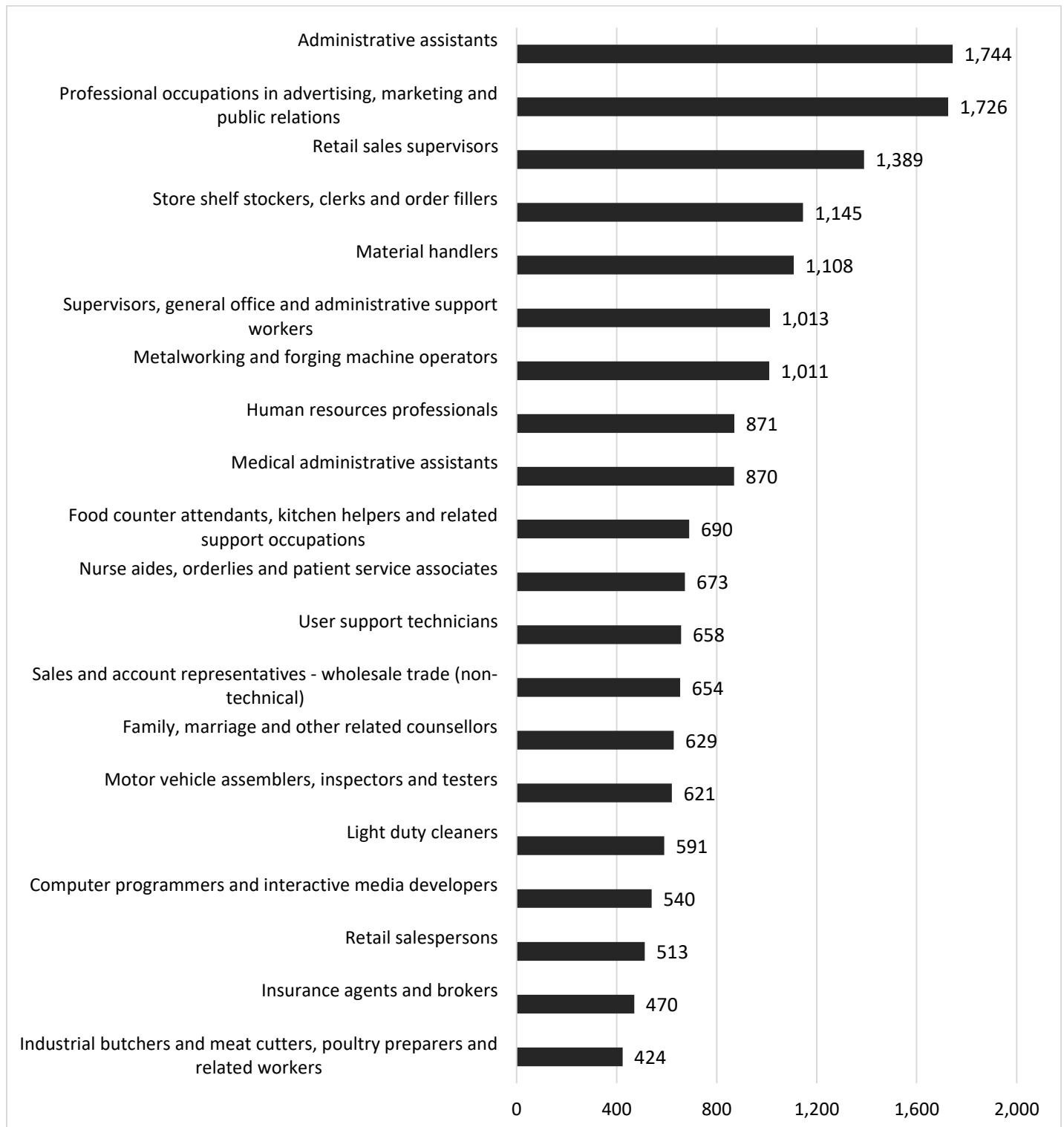
Table 11: Occupations with Highest Level of Employment in the Labour Recruitment Area

Description	2017 Jobs	2022 Jobs	2017-2022 Change	2017 - 2022 % Change	2021 Median Wages
Retail salespersons	13,332	13,845	513	4%	\$31,785
Food counter attendants, kitchen helpers and related support occupations	10,151	10,841	690	7%	\$29,204
Cashiers	9,179	8,948	-231	-3%	\$29,293
Registered nurses and registered psychiatric nurses	8,884	8,544	-340	-4%	\$82,761
Transport truck drivers	8,195	7,465	-730	-9%	\$48,981
Nurse aides, orderlies and patient service associates	7,732	8,406	673	9%	\$44,335
Sales and account representatives - wholesale trade (non-technical)	6,441	7,095	654	10%	\$58,634
Material handlers	5,764	6,872	1108	19%	\$40,757
Elementary school and kindergarten teachers	5,625	5,970	346	6%	\$95,004
Administrative officers	5,529	4,714	-815	-15%	\$50,230
General office support workers	5,487	4,574	-914	-17%	\$43,852
Retail sales supervisors	5,468	6,857	1389	25%	\$41,013
Janitors, caretakers and building superintendents	5,203	4,793	-411	-8%	\$42,124
Store shelf stockers, clerks and order fillers	5,167	6,313	1145	22%	\$30,516
Cooks	4,895	4,375	-520	-11%	\$30,738
Other customer and information services representatives	4,749	4,348	-402	-8%	\$35,559
Secondary and elementary school teachers and educational counsellors, n.e.c.	4,639	4,459	-180	-4%	\$88,091
Retail and wholesale trade managers	4,561	3,940	-620	-14%	\$75,094
Construction millwrights and industrial mechanics	4,516	4,718	202	4%	\$62,873
Construction trades helpers and labourers	4,488	4,316	-173	-4%	\$43,396
Shippers and receivers	4,381	4,152	-229	-5%	\$42,165

Source: EMSI Analyst 2022.3.

Figure 9 illustrates occupations that added the largest total number of jobs to the economy of the labour recruitment area between 2017 and 2022.

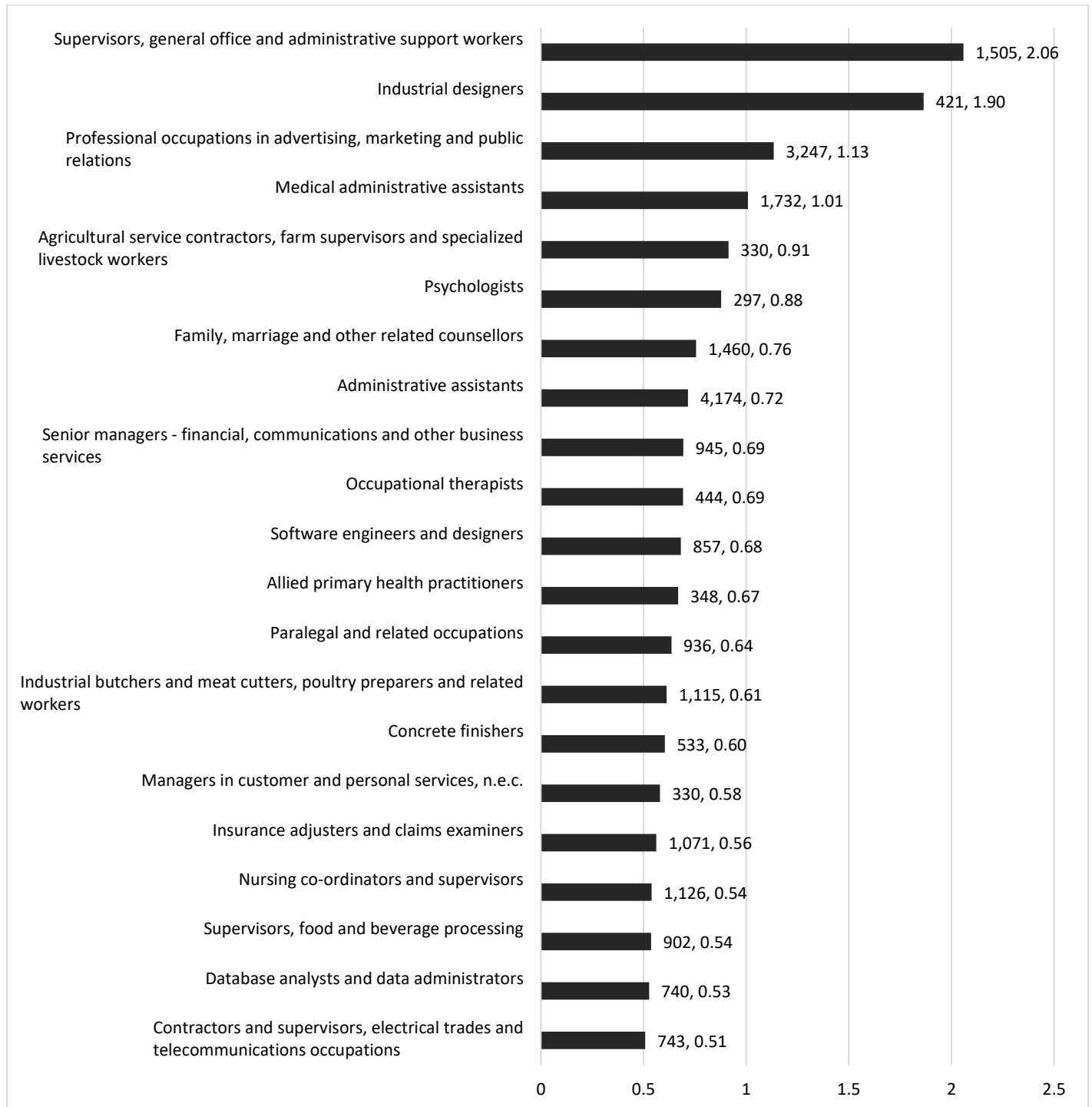
Figure 9: Largest Absolute Job Growth in the Labour Recruitment Area, 2017-2022



Source: EMSI Analyst 2022.3.

Figure 10 illustrates occupations that had the most intense growth in jobs, and also had a relevant impact on the economy as they added a minimum of 100 jobs to the labour recruitment area. Figure 10 presents relative job growth and 2022 job count figures. Please note, this figure represents relative growth (i.e., 2.06 suggests the job has grown by 2.06x) whereas Figure 9 presents absolute job growth (total number of jobs increased)

Figure 10: Largest (%) Growth Occupations in the Labour Recruiting Area, 2017-2022



Source: EMSI Analyst 2022.3.

Location Quotient is used to measure the relative concentration of an occupation; that is, it compares the percentage of jobs per occupation in the labour shed, relative to the total percentage of jobs in the same occupation across Ontario and Canada. A location quotient above 2 means the labour recruiting area employs twice as many jobs in that occupation than is typical in the province or nation. Such a high concentration shows that there is some momentum in growing or attracting these jobs unique to the region.

Table 12 illustrates occupations that are most heavily concentrated in the labour recruitment area, relative to the rest of Canada—using location quotient. Occupations are considered concentrated if they have a location quotient above 1.25. For Location Quotient data specific to Brantford, please see Section 3.5.

Table 12: Concentrated Occupations in the Labour Recruitment Area, 2022

Occupation	2022 Jobs in the Local Labour Recruiting Area	Provincial Location Quotient	National Location Quotient
Machine operators, mineral and metal processing	1,185	3.64	3.72
Motor vehicle assemblers, inspectors and testers	4,937	3.06	7.22
Supervisors, motor vehicle assembling	1,754	3.00	6.67
Structural metal and platework fabricators and fitters	208	2.77	1.47
Managers in aquaculture	13	2.71	0.64
Industrial butchers and meat cutters, poultry preparers and related workers	1,115	2.68	2.12
Nursery and greenhouse workers	1,534	2.57	2.88
Industrial painters, coaters and metal finishing process operators	888	2.56	2.47
Inspectors and testers, mineral and metal processing	81	2.53	1.97
Patternmakers - textile, leather and fur products	23	2.49	0.73
Crane operators	972	2.45	2.42
Boilermakers	108	2.40	1.44
Welders and related machine operators	3,940	2.29	1.81
Managers in agriculture	182	2.25	1.00
Machining tool operators	761	2.22	3.20
Metalworking and forging machine operators	3,569	2.20	4.17
Fish and seafood plant workers	46	2.18	0.39
Contractors and supervisors, machining, metal forming, shaping and erecting trades and related occupations	508	2.18	1.60
Boat assemblers and inspectors	55	2.15	0.85
Supervisors, mineral and metal processing	499	2.05	2.14

Source: EMSI Analyst 2022.3.

2.5. Key Occupations for Labour-Based Investment Attraction

Some key occupations stand out in the labour recruitment area because they are growing, projected to grow and/or are concentrated. The following list represents occupations that have performed well in the labour recruitment area analysis and represent a strong possibility for labour-based investment attraction. Occupations related to publicly funded industries and retail-related occupations are not considered here. Specifically, these are occupations that are large (300+ jobs), growing (by at least 25% of total jobs), concentrated (with a national LQ greater than 1.50) and pay well (2021 median wage of \$60,000 or higher):

1. Allied primary health practitioners.
2. Paramedical occupations.
3. Industrial electricians.
4. Supervisors, motor vehicle assembling.
5. By-law enforcement and other regulatory officers.
6. Insurance underwriters.
7. Concrete finishers.

The following are key emerging occupations, or those that are not yet concentrated (LQ less than 1.25) and had the largest percentage growth over the past 5 years (over 60% of total jobs), while at the same time being well-paying occupations wages (2021 median wage of \$60,000 or higher):

1. Underground mine service and support workers.
2. Software engineers and designers.
3. Senior managers – financial, communications and other business services.
4. Psychologists.
5. Professional occupations in advertising, marketing and public relations.
6. Occupational therapists.
7. Industrial designers.
8. Accommodation service managers.

The above occupations form a group of what will be referred to as “key occupations”, which are widely employed and/or increasingly in demand within the City. They represent the best opportunity in terms of attracting industry to Brantford based on labour market patterns. In what follows, the industries that most commonly hire these key occupations are revealed using inverse staffing patterns.

Table 13 shows which industries in the labour recruitment area most commonly employ (by largest number of jobs) all of the identified key occupations presented above. For example, within *motor vehicle manufacturing*, there were 1,738 jobs within the above occupations in

2022, which represents 25.6% of all jobs within this industry. From the list of industries identified to most commonly hire the key occupations that have performed well or are emerging within the region, the following have seen the fastest growth (10% or above) in the labour recruitment area over the previous 5 years:

- Other federal services⁷.
- Community colleges.
- Depository credit intermediation.
- Universities.

Table 13: Key Staffing Patterns, 2017-2022

Industry	Key Jobs in Industry (2017)	Key Jobs in Industry (2022)	% Change (2017-2022)	% of Total Jobs in Industry (2021)
Motor vehicle manufacturing	1,354	1,738	28%	25.6%
Insurance carriers	585	821	40%	30.2%
General medical and surgical hospitals	434	716	65%	3.3%
Other ambulatory health care services	372	657	77%	72.2%
Local, municipal and regional public administration	518	616	19%	4.1%
Computer systems design and related services	261	542	108%	12.7%
Universities	144	381	164%	3.6%
Iron and steel mills and ferro-alloy manufacturing	232	302	30%	4.4%
Foundation, structure, and building exterior contractors	190	292	54%	7.9%
Motor vehicle parts manufacturing	216	289	34%	5.2%
Building equipment contractors	179	268	49%	2.7%
Offices of other health practitioners	165	254	54%	9.0%
Employment services	166	248	49%	3.8%
Advertising, public relations, and related services	118	236	101%	30.1%
Grant-making and giving services	105	234	123%	30.9%

⁷ This industry group comprises establishments of the federal government, not classified to any other industry group, primarily engaged in executive and legislative activities; fiscal and related policies and the administration of the public debt; assessing, levying and collecting taxes; conducting relations with other governments; and the administration of federal programs.

Industry	Key Jobs in Industry (2017)	Key Jobs in Industry (2022)	% Change (2017-2022)	% of Total Jobs in Industry (2021)
Management of companies and enterprises	67	143	114%	10.8%
Management, scientific and technical consulting services	71	142	100%	7.7%
Offices of physicians	94	139	47%	4.0%
Architectural, engineering and related services	70	138	97%	3.9%
Software publishers	52	123	134%	11.7%
Out-patient care centres	60	118	96%	5.8%
Home health care services	60	117	95%	3.4%
Other professional, scientific and technical services	53	113	112%	5.0%

Source: EMSI Analyst 2022.3.



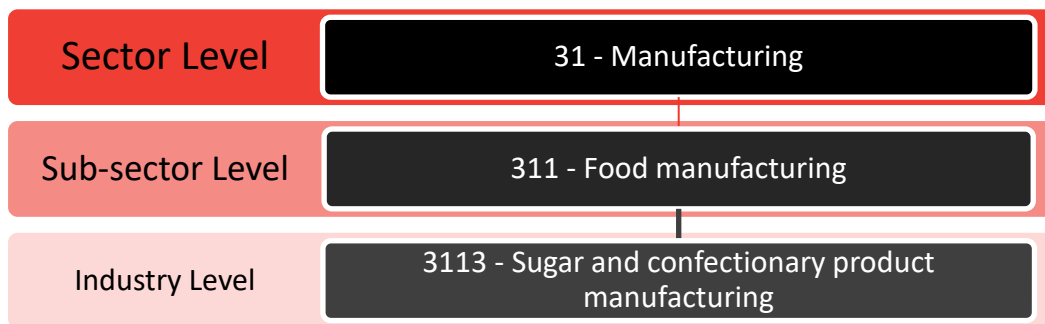
3. ECONOMIC BASE ANALYSIS

The list of industries in Table 13 (previous page) is an indication of industries that could be successful to Brantford given the labour force supply or could be further developed alongside supporting industries.

This section investigates the local economy pertinent for Brantford, or the jobs and businesses that drive the local economy. As such, the central focus of this section will be Brantford, benchmarked by Ontario.

This section reports industry statistics related to exports, employment, and business growth for the local economy with the aim of uncovering key industries that either exist or are emerging in the region today.

The “North American Industry Classification System” (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industries categories are called sectors, which are broken down into sub-sectors, which are then further broken down into Industries. An example of this breakdown follows:



3.1. Employment Profile

The primary employment sectors in Brantford are manufacturing; health care and social assistance; and retail trade. Between 2012 and 2022, the local economy grew by 4,129 jobs (10%) to a total of 47,564 jobs. Percentage job growth in Brantford lagged slightly relative to the province, where job totals increased by 14% between 2012-2021. Table 144 indicates the percentage of job growth, by sector, for each of these economies.

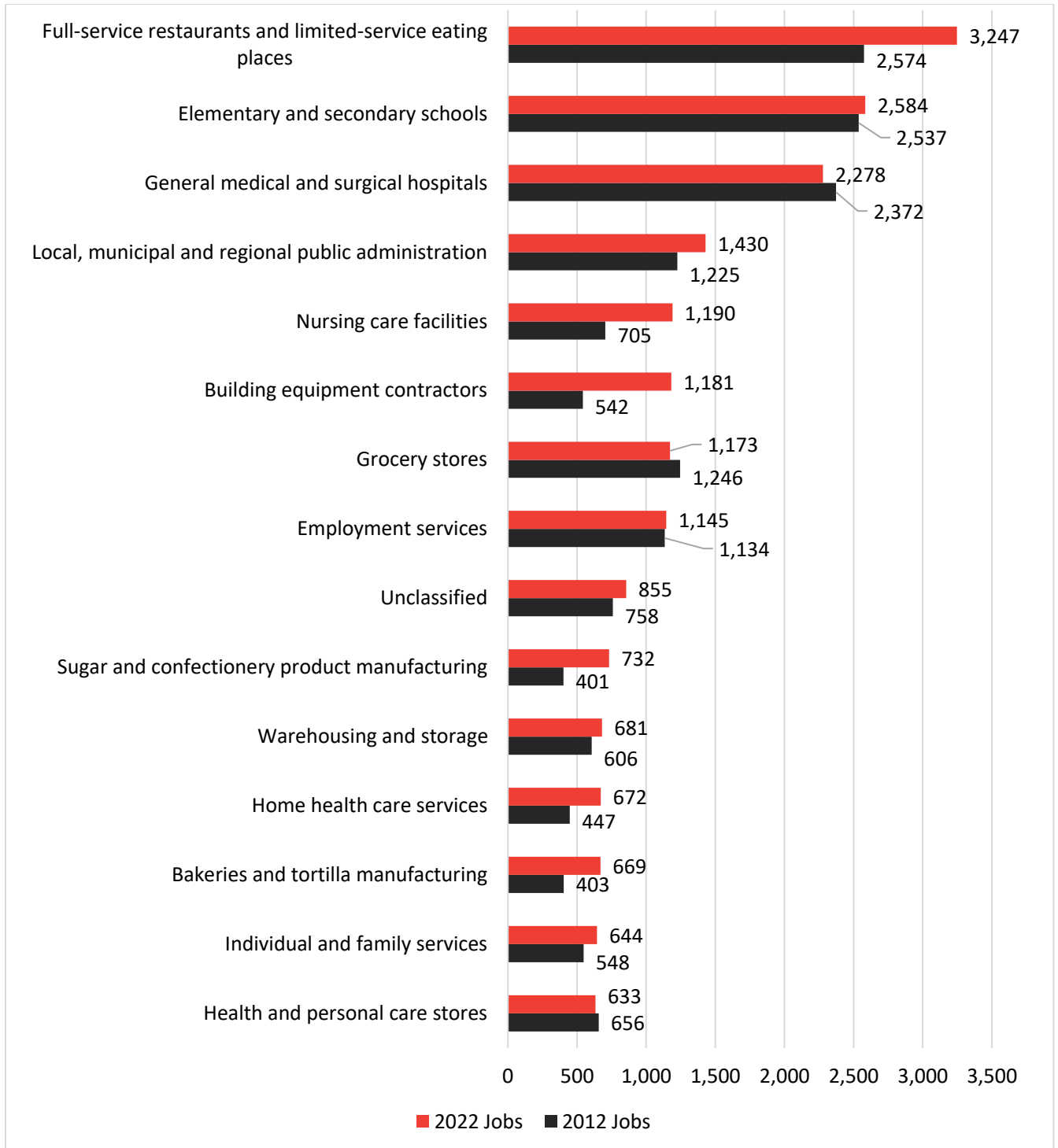
Table 14: Employment Growth by Sector, Brantford and Ontario, 2012-2022

NAICS	Description	2022 Jobs	2012-2022 Change	Brantford % Jobs Change	Ontario % Jobs Change
11	Agriculture, forestry, fishing and hunting	114	12	12%	-8%
21	Mining, quarrying, and oil and gas extraction	29	N/A	N/A	15%
22	Utilities	223	56	34%	7%
23	Construction	2,962	1,289	77%	32%
31-33	Manufacturing	8,871	1,351	18%	1%
41	Wholesale trade	2,981	151	5%	11%
44-45	Retail trade	5,631	-9	0%	7%
48-49	Transportation and warehousing	1,791	135	8%	21%
51	Information and cultural industries	438	152	53%	11%
52	Finance and insurance	882	41	5%	20%
53	Real estate and rental and leasing	547	16	3%	13%
54	Professional, scientific and technical services	1,447	365	34%	45%
55	Management of companies and enterprises	72	29	68%	10%
56	Administrative and support, waste management and remediation services	2,446	-366	-13%	11%
61	Educational services	3,381	131	4%	18%
62	Health care and social assistance	7,035	518	8%	24%
71	Arts, entertainment and recreation	822	-645	-44%	9%
72	Accommodation and food services	3,560	541	18%	7%
81	Other services (except public administration)	1,648	124	8%	-1%
91	Public administration	1,828	120	7%	10%
X0	Unclassified	855	98	13%	17%
All	Total	47,564	4,129	10%	14%

Source: EMSI Analyst 2022.3.

To better understand how each sector supports jobs, Figure 11 shows job count data for the top 15 subsectors in terms of employed positions in Brantford by number of jobs in 2022. Jobs in 2012 are also shown to illustrate employment change.

Figure 11: Largest Industries by Number of Jobs, 2012 and 2022



Source: EMSI Analyst 2022.3.

Figure 12 illustrates potential areas for investment attraction as they are having a significant economic impact in terms of job creation: publicly funded industries (i.e., education and healthcare), retail and wholesale trade, as well as those related to residential construction are excluded as they are not pertinent to investment attraction since they are dependent on population growth.

Figure 12: Growth Sectors and Industries, 2017-2022

Professional Services and Non-Public Healthcare

Employment Services.

Home Health Care Services.

Individual and Family Services.

Depository Credit Intermediation.

Manufacturing

Sugar and Confectionery Product Manufacturing.

Bakeries and Tortilla Manufacturing.

Pharmaceutical and Medicine Manufacturing.

Plastic Product Manufacturing.

Source: EMSI Analyst 2022.3.



3.2. Economic Output

This subsection highlights industries with the largest economic impact. Table 15 illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. As can be seen, manufacturing towers above other industries in terms of total sales figures, with sales totally over \$6 billion. Four industries each account for over \$500 million in total sales within Brantford:

- Manufacturing;
- Construction;
- Health care and social assistance; and
- Wholesale trade.

Table 15: Economic Output by Industry, 2020

Industry	Sales	Average Wages
Manufacturing	\$6,102,865,502	\$54,763
Construction	\$851,437,725	\$66,434
Health care and social assistance	\$725,065,632	\$49,470
Wholesale trade	\$598,869,012	\$61,428
Public administration	\$485,419,450	\$65,601
Retail trade	\$399,990,432	\$27,920
Educational services	\$361,889,051	\$62,916
Transportation and warehousing	\$319,507,506	\$50,681
Administrative and support, waste management and remediation services	\$230,567,002	\$26,840
Professional, scientific and technical services	\$223,286,015	\$51,970
Real estate and rental and leasing	\$217,655,465	\$37,069
Other services (except public administration)	\$216,036,284	\$41,389
Accommodation and food services	\$214,611,308	\$19,025
Finance and insurance	\$197,594,625	\$49,031
Information and cultural industries	\$95,890,585	\$39,715
Utilities	\$89,973,452	\$79,500
Agriculture, forestry, fishing and hunting	\$80,332,143	\$29,588
Arts, entertainment and recreation	\$79,636,680	\$33,384
Mining, quarrying, and oil and gas extraction	\$7,394,601	\$94,154
Management of companies and enterprises	\$6,749,553	\$64,142
Total	\$11,504,772,024	\$47,656

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

3.3. Export Sales

This subsection investigates export sales by industry. Exports show the amount of money that is spent by industries located outside the region (domestically and internationally) in exchange for goods or services produced by an industry located in Brantford. In 2020 the most recent data available, total export sales amounted to \$7,460,607,127. Table 16 presents the largest drivers of external revenues into Brantford, once again led by the manufacturing sector.

Table 16: Top Export Dollars Flowing into Brantford by Industry, 2020

Industry	Total Export Sales
Manufacturing	\$4,600,533,796
Health care and social assistance	\$546,754,386
Public administration	\$424,048,425
Wholesale trade	\$367,223,627
Educational services	\$293,900,075
Construction	\$253,333,728
Transportation and warehousing	\$182,181,986
Retail trade	\$123,777,317
Administrative and support, waste management and remediation services	\$117,914,250
Professional, scientific and technical services	\$98,052,125
Other services (except public administration)	\$85,256,803
Finance and insurance	\$71,103,729
Accommodation and food services	\$67,433,273
Real estate and rental and leasing	\$65,224,985
Arts, entertainment and recreation	\$44,934,796
Agriculture, forestry, fishing and hunting	\$41,349,342
Information and cultural industries	\$36,203,693
Utilities	\$34,332,051
Mining, quarrying, and oil and gas extraction	\$4,252,170
Management of companies and enterprises	\$2,796,570
Total Exports	\$7,460,607,127

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

3.4. Industry Supply Chain Analysis

An economic base analysis evaluates how the local economy functions. It does not provide solutions to economic problems but instead provides useful information required for decision-making about economic strategies.

The economic base analysis helps determine which economic activities “bring money in”, and where money might be “leaking out”. Another way to assess this metric is to assess the in-region and imported purchases made by each subsector within Brantford. Table 17 presents the top 15 industries in terms of total goods purchased-from, as well as the percentage of those purchases made in-region and out-of-region.

Table 17: Top Industries by Purchasing Power, Brantford, 2020

Industry	Total Purchases from Sector	Percentage Purchased in Region	Percentage Purchased Out of Region
Farms	\$173,529,192	14.6%	85.4%
Oil and gas extraction	\$98,232,681	0.0%	100.0%
Plastic product manufacturing	\$97,093,352	69.9%	30.1%
Lessors of real estate	\$93,705,901	37.5%	62.5%
Architectural, engineering and related services	\$81,837,800	31.9%	68.1%
Depository credit intermediation	\$80,962,104	24.3%	75.7%
Basic chemical manufacturing	\$79,397,591	5.1%	94.9%
Metal ore mining	\$74,820,856	0.0%	100.0%
Iron and steel mills and ferro-alloy manufacturing	\$72,305,900	55.0%	45.0%
Pharmaceutical and medicine manufacturing	\$70,455,115	99.7%	0.3%
Petroleum and coal product manufacturing	\$69,105,767	68.3%	31.7%
Electric power generation, transmission and distribution	\$68,385,969	25.6%	74.4%
Grain and oilseed milling	\$63,831,514	11.6%	88.4%
General freight trucking	\$63,517,571	44.3%	55.7%
Converted paper product manufacturing	\$60,855,952	69.2%	30.8%

Source: 2022.3 EMSI Analyst, based on 2020 National Input-Output Tables by StatsCan.

3.5. Location Quotient Analysis

Location quotient (LQ) analysis compares the level of employment concentration (or specialization) in a local economy (i.e., Brantford) to the level of employment concentration in one or more benchmark areas. In other words, does the local economy have proportionately more or fewer employees in specific industries than the benchmark area?

3.5.1. Location Quotient Analysis by Sector

LQ helps to identify the strengths of the community. The location quotient at the broadest industry classification level (presented in Table 18) indicates that Brantford has the strongest specializations relative to the rest of the province and nation in the following sectors:

- Manufacturing.
- Health care and social assistance.
- Wholesale trade.

Table 18: Location Quotient Analysis by Sector

Description	2022 Provincial Location Quotient	2022 National Location Quotient
Manufacturing	1.89	2.12
Health care and social assistance	1.29	1.18
Wholesale trade	1.20	1.36
Accommodation and food services	1.17	1.11
Arts, entertainment and recreation	1.15	1.12
Retail trade	1.10	1.04
Construction	1.09	0.99
Other services (except public administration)	1.01	0.97
Unclassified	0.99	0.97
Administrative and support, waste management and remediation services	0.93	1.10
Educational services	0.92	0.91
Transportation and warehousing	0.88	0.84
Real estate and rental and leasing	0.70	0.73
Utilities	0.62	0.65
Public administration	0.54	0.52
Professional, scientific and technical services	0.42	0.48
Information and cultural industries	0.39	0.43
Finance and insurance	0.34	0.41
Agriculture, forestry, fishing and hunting	0.34	0.21
Management of companies and enterprises	0.22	0.22
Mining, quarrying, and oil and gas extraction	0.14	0.05

Source: EMSI Analyst 2022.3.

3.5.2. Location Quotient Analysis by Industry

Tables 19 and 20 list the industries that are concentrated in Brantford's local economy.

Table 19: Concentrated Industries, Relative to the Rest of Canada, 2022

Description	2021 Jobs	2021 National Location Quotient
Sugar and confectionery product manufacturing	732	26.28
Household appliance manufacturing	131	16.31
Spring and wire product manufacturing	105	9.40
Boiler, tank and shipping container manufacturing	286	9.34
Clay product and refractory manufacturing	32	7.12
Fruit and vegetable preserving and specialty food manufacturing	368	6.76
Pharmaceutical and medicine manufacturing	541	6.06
Tobacco manufacturing	30	5.81
Coating, engraving, cold and heat treating and allied activities	166	5.59
Other chemical product manufacturing	170	5.57

Source: EMSI Analyst 2022.3.

Table 20: Concentrated Industries, Relative to the Rest of Ontario, 2022

Description	2021 Jobs	2021 Provincial Location Quotient
Sugar and confectionery product manufacturing	732	22.30
Boiler, tank and shipping container manufacturing	286	9.46
Fruit and vegetable preserving and specialty food manufacturing	368	8.61
Household appliance manufacturing	131	8.30
Spring and wire product manufacturing	105	7.79
Tobacco manufacturing	30	7.73
Gambling industries	357	6.68
Recyclable material merchant wholesalers	263	5.58
Other chemical product manufacturing	170	5.38
Other heavy and civil engineering construction	266	5.30

Source: EMSI Analyst 2022.3.

3.6. Shift-Share Analysis

Shift-share analysis compares the local employment growth/decline of regional jobs by industry to the employment growth/decline of that industry, as well as the job growth overall for Canada. More specifically, this analytical tool examines job growth/decline by attributing growth, stability, or decline in industries over time to three forces:

- National economic growth: regional job growth/decline that is attributable to the growth, stability, or decline of the entire Canadian economy. Industries will be impacted positively or negatively by the state of the Canadian economy and consumer spending at a national level, external to any local factors.
- Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that particular economic activity in the Canadian economy (with the economic growth component removed). General industry trends are outside the influence of local actors and are therefore removed from the local impact.
- Local economic growth: local job growth/decline that is attributable to the local economy because it is growing/declining more or less quickly than jobs in the larger economy (with the Canadian economic and industry growth components removed).

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method. It has been applied to NAICS Industries using place of work statistics. Shift-share analysis allows the examination of changes through time (trends) versus the static snapshot of location quotients.

3.6.1. Shift-Share Analysis within Brantford

This subsection looks to the past (2012) and current figures (2022) to assess which sectors have been most positively impacted by local factors. The example below applies the model to the *building equipment contractors* sector:

From 2012 to 2022 the *building equipment contractors* sector saw an increase of 639 jobs in Brantford. It would have been expected that the sector increased by 46 positions based on large-scale industry factors that are relevant to the sector regardless of geographic location. National economic growth factors and their impact on the national sector would have been expected to lead to a net increase of 67 jobs over the same time period. As such, before accounting for local factors, the sector would have been expected to gain 113 jobs. Instead, the local sector grew by 639 jobs, suggesting that 526 new jobs can be applied to factors specific to Brantford.

Table 21 allocates employment changes for the ten industries most positively impacted by local effects to national, industry and regional/local effects.⁸

Table 21: Shift-Share Analysis: Competitive Industries, Brantford, 2012-2022

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Building equipment contractors	639	46	67	526
Full-service restaurants and limited-service eating places	674	-18	317	374
Sugar and confectionery product manufacturing	331	-23	49	304
Nursing care facilities	486	103	87	296
Meat product manufacturing	270	-1	16	254
Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	230	-7	12	225
Other heavy and civil engineering construction	249	28	2	218
Bakeries and tortilla manufacturing	266	25	50	191
Specialty food stores	227	16	25	187
Boiler, tank and shipping container manufacturing	123	-54	20	156

Source: EMSI Analyst 2022.3.

Conversely, Table 22 presents the five industries most negatively impacted by regional/local effects from 2012-2022.

Table 22: Shift-Share Analysis: Declining Industries, Brantford, 2012-2022

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Business support services	-300	-67	57	-291
Elementary and secondary schools	48	54	313	-319
Other residential care facilities	-326	-42	48	-331
Gambling industries	-542	-315	111	-337
General medical and surgical hospitals	-94	-15	292	-372

Source: EMSI Analyst 2022.3.

⁸ Regional/Local Effect is calculated as growth/decline + industry growth effect + national economic effect. Please note that numbers will not always sum exactly, due to rounding methods and adjusting part-time employment to full-time equivalence.

3.7. Employer Structure

This subsection illustrates the number and size of employers by industry in Brantford. The data in this section comes from Statistics Canada’s Canadian Business Patterns dataset. Employers in this dataset include businesses in the Business Register, which are all Canadian businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to Canada Revenue Agency; or
- Have a minimum of \$30,000 in annual revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

Statistics Canada divides businesses into two major groupings:

1. Businesses with a determinate number of employees; and
2. Businesses with an indeterminate number of employees.

Businesses without employees correspond to the “indeterminate” employment category from the previous reference periods. For economic development purposes, businesses with a determinate number of employees (one or more) are of greater interest than indeterminate businesses (which frequently are not active or have very low levels of economic activity). An increase in the number of indeterminate businesses can, however, signal potential new business startups.

According to the Canadian Business Registry, Brantford had 6,780 businesses as of June 2022, of which 2,386 (35.2%) had employees. Of these 2,386 businesses, the majority had between one and nine employees (1,638 or 68.7%). Comparatively, 155 businesses (6.5%) had over 50 employees. These breakdowns are presented in Table 23.

Table 23: Business Counts by Size, Brantford, June 2022

	1 to 9 Employees	10 to 49 Employees	50+ Employees	Indeterminate	Total
Number of Businesses	1,638	593	155	4,394	6,780

Source: Canadian Business Patterns June 2022 from EMSI Analyst.

The largest sectors by total number of businesses with employees in Brantford are:

1. Retail Trade
2. Construction
3. Health care and social assistance

Table 24 presents the five largest sub-sectors by business counts and includes businesses both with and without employees. The presence of a significant number of “lessors of real estate” speaks to the existence of individuals renting out a property and recording it as a business with the CRA.

Table 24: Top 5 Sub-sectors by Business Counts, Brantford, 2022

Sector	Businesses
Lessors of real estate	1,551
General freight trucking	458
Other financial investment activities	274
Offices of real estate agents and brokers	232
Full-service restaurants and limited-service eating places	202

Source: Canadian Business Patterns June 2022 from EMSI Analyst.

Many of these businesses, especially “lessors of real estate”, are self-employed individuals with no employees. Table 25 notes the subsectors in Brantford by businesses only with employees, excluding self-employed individuals.

Table 25: Top 5 Sub-sectors by Businesses with Employees, Brantford, 2022

Sector	Businesses with employees
General freight trucking	202
Full-service restaurants and limited-service eating places	158
Building equipment contractors	73
Offices of physicians	72
Lessors of real estate	66

Source: Canadian Business Patterns June 2022 from EMSI Analyst.



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