



LOCAL LABOUR MARKET **PLANNING REPORT**

2017

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ABOUT THIS REPORT



Niagara Workforce Planning Board (NWPB) serves the Niagara region as a leader in local labour market planning, delivering authoritative research, identifying employment trends, targeting workforce opportunities, and bringing people together to create solutions to workforce challenges.

This report is our annual summary of the developments, challenges, and strengths of the local labour market. Additional labour market information is always available at niagaraworkforce.ca

We encourage feedback from our readers. If you have any questions or comments about this report, please consider filling out this quick feedback form:

<https://www.surveymonkey.com/r/LLMPFeedback>

OUR MISSION

NWPB is one of 26 planning regions in Ontario that make up the Local Boards Network. Local boards are funded through Employment Ontario. Each year we provide labour market planning that is tailored to local economic realities, delivering activities and projects to help communities achieve better results.

Niagara Workforce Planning Board's role is one of facilitation and communication. Our focus is on bringing community stakeholders together to identify labour force issues and develop possible solutions. NWPB strives to ensure that information on community initiatives and actions are disseminated in an accurate and concise manner throughout the Niagara region.



(Photo credit: Ralph deGroot)

OUR NETWORKS



This **Employment Ontario** project is funded by the Ontario government.

**EMPLOYMENT
ONTARIO**

The views expressed in this document do not necessarily reflect those of Employment Ontario.



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EXECUTIVE SUMMARY

The 2017 update to the Niagara Labour Market Plan is built on an evidence-based analysis of local labour market strengths and challenges. It is our hope that this report will be of value to community organizations, various levels of government, job seekers, employers, and other Niagara stakeholders. We hope it will help inform their plans for future success, and that these successes will continue to make Niagara an excellent place to live and do business.

This executive summary provides an overview of the findings in this report. Further details can be found later in the document. Readers should note that this document provides a summary of Niagara at a regional level, and current data on Niagara's 12 municipalities can be found in our municipal fact sheets. Compared to 2015, in 2016 Niagara saw slight increases in unemployment and decreases in both participation and employment rates. However, recent trends since 2011 remain positive. Since 2006, Niagara has seen changes in employment trends. Specifically, part-time employment slightly decreased between 2015 and 2016 whereas full-time employment increased. The 2016 local labour market continued to house

more than 200,000 individuals reporting employment.

Micro-businesses (i.e., establishments employing between one and four individuals) represented a majority of Niagara's employer landscape. In 2016, micro-businesses comprised 50.5% of all businesses in Niagara. Combining micro- and small businesses (together, those establishments employing between one and ninety-nine individuals) accounts for 97.8% of all Niagara employers.

Niagara's three largest employment industries were wholesale and retail trade, health care and social assistance, and accommodation and food services. Together they comprised 42.7% of employment in Niagara throughout 2016. Both agriculture and public administration saw exceptional local growth between 2015 and 2016. Since 2011, employment in construction has increased by 24.8%, and accommodation and food services grew by 23.6%, both of which are larger trends than what was observed in Ontario as a whole.

In terms of the training and education of Niagara's labour force, our region has

a higher proportion of individuals in the labour force with college certificates/diplomas, and apprenticeship or trades certificates/diplomas when compared to the provincial base line. Case data from Niagara's Employment Ontario Employment Services providers allow us to create a picture of the available labour pool in Niagara. Most Employment Services clients were between the ages of 25 and 44 and have completed secondary education. The majority of clients (approximately 51%) have been out of employment for less than three months, and 77.5% have been out of employment for less than a year.

Since 2015, NWPB has conducted the Employer One survey. Results from the 2018 delivery of the survey were not available in time for the production of this report. Data from the 2017 delivery of Employer One reported consistent findings with previous years. Therein, 81% of respondents reported hiring with 42% identifying hiring challenges. Word-of-mouth and informal recruiting remained the most popular method for recruiting. In addition to the Employer One survey, NWPB has begun using a state-of-the-art aggregation tool, Talent

Neuron, which allows us to have a better understanding of the public-facing job demand in the Niagara region. In 2016, we found 16,300 public-facing job postings with 83.8% of all postings being housed in St. Catharines, Niagara Falls, and Welland.

Note: As we have noted in previous publications, there is a difference between the Niagara region and the St. Catharines–Niagara Census Metropolitan Area (CMA). The Niagara region includes all municipalities in Niagara, whereas the CMA exists independent of Grimsby and West Lincoln. This difference is due to commuter flow between metropolitan areas which places Grimsby in Hamilton's CMA. West Lincoln is part of what Statistics Canada defines as "non-CMA Ontario." Whenever possible NWPB strives to use regional-level data. Each section of this report notes which geography is being discussed. NWPB's municipal brochures, to be released in 2018, will examine the labour market trends of Niagara's individual towns and cities, including both Grimsby and West Lincoln.

LABOUR MARKET OVERVIEW

Understanding a local labour market requires, at a minimum, three key indicators: the unemployment rate, participation rate, and employment rate. The employment rate measures the proportion of the working age population (i.e. individuals age 15 or older) who are currently employed. The participation rate measures the proportion of the working age population who are currently employed and those who are looking for work. The unemployment rate measures the working-age population who are not employed but are looking for work.

While falling unemployment rates since 2011, as seen in Figure 1, are generally good for Niagara, they must be measured against employment and participation rates to produce a complete picture of the employment landscape. In an ideal situation (i.e. one that is likely to reflect job growth) falling unemployment rates would be paired with increases in the employment rate and either a steady or growing participation rate.

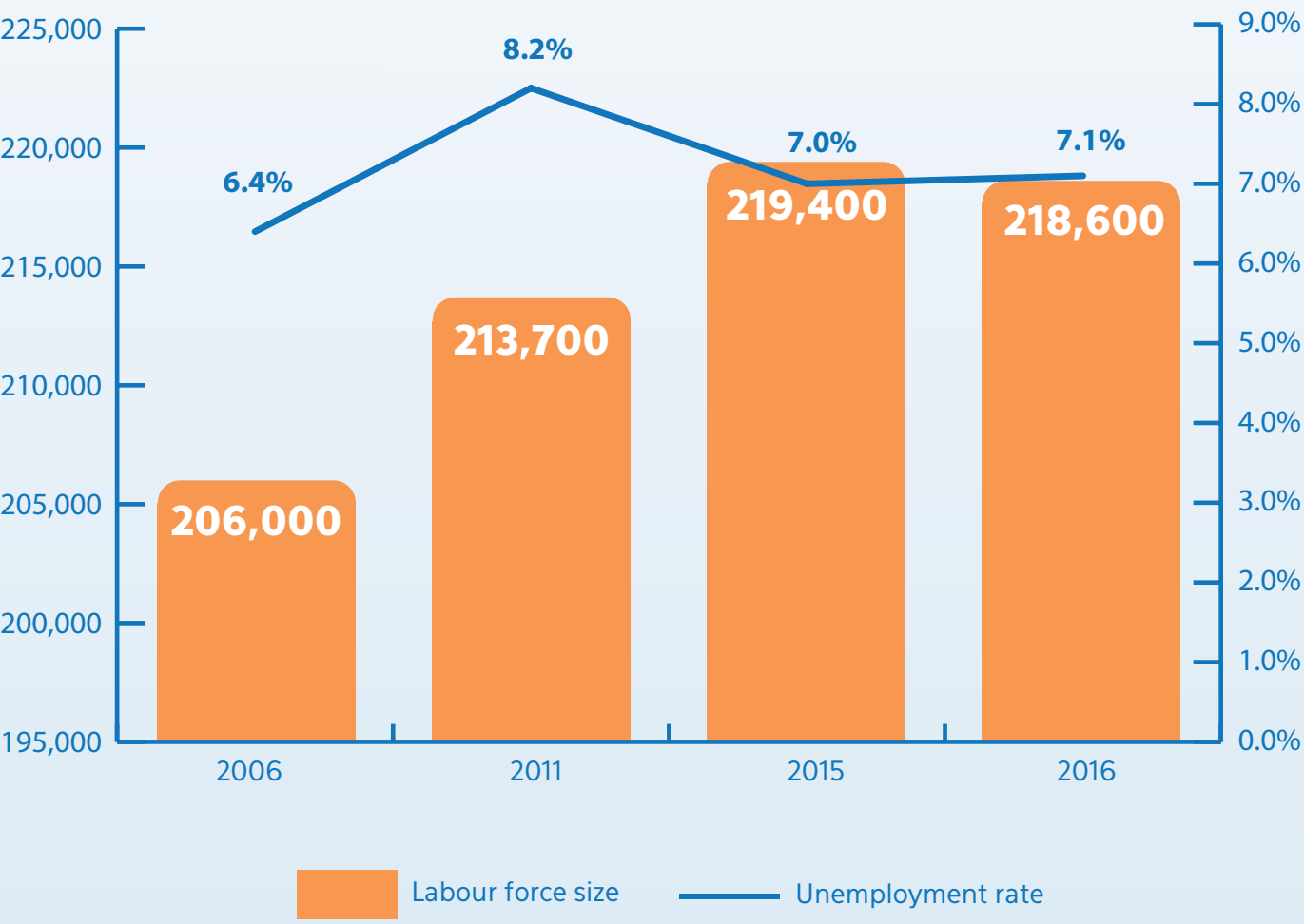
Although Niagara saw a slight increase in unemployment between 2015 and 2016 and decreases in the participation and employment rates (Figure 2), the

overall pattern since 2011 remains a positive trend for the local labour market. Recent trends note increases in both the employment and participation rate. The following section will illustrate why Niagara's unemployment has seen a marginal increase in the unemployment rate and a decrease in the unemployment rate.

Although overall employment has grown in Niagara since the recession of 2008-09, as seen on page 10, it is important to measure changing patterns in employment. To that end, we can explore the changing patterns of full-time and part-time employment in Niagara. Statistics Canada defines a full-time job as one where an individual works 30 hours or more in a given work week. This definition does not factor for job quality considerations such as job permanence, pensions, or benefits.

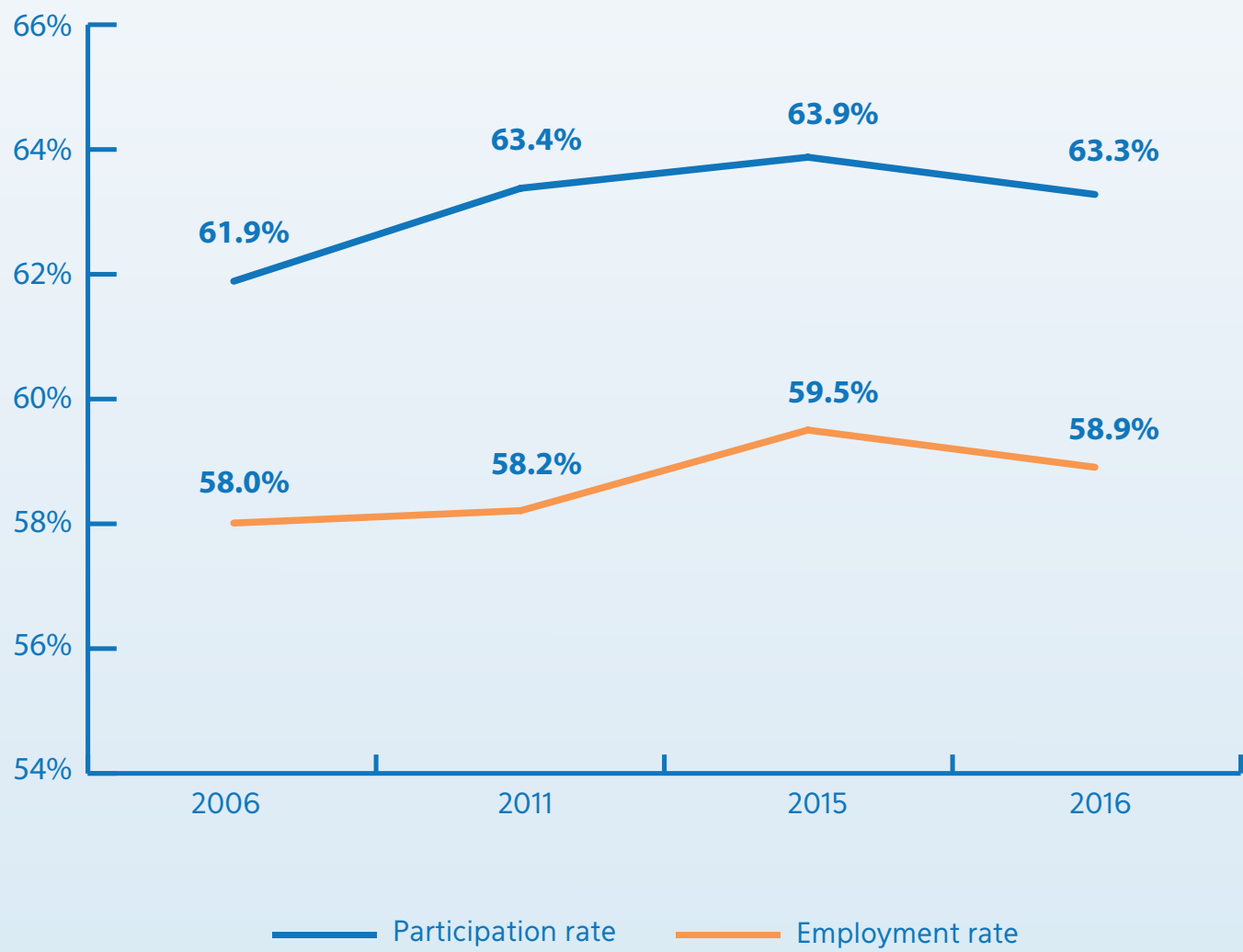
Since 2006, Niagara has seen gradual growth in part-time employment, both in terms of total part-time employment, as seen in Table 1, and the proportion of part-time employment in Niagara, illustrated in Table 2.

FIGURE 1: ST. CATHARINES-NIAGARA CMA LABOUR FORCE ESTIMATES AND UNEMPLOYMENT RATES



(Source: CANSIM 282-0129, St. Catharines-Niagara Census Metropolitan Area)

FIGURE 2: ST. CATHARINES-NIAGARA CMA PARTICIPATION AND EMPLOYMENT RATES



(Source: CANSIM 282-0129, St. Catharines-Niagara Census Metropolitan Area)

TABLE 1: TOTAL FULL-TIME AND PART-TIME EMPLOYMENT IN NIAGARA

Employment Status	2006	2011	2015	2016
Full-time employment	152,700	150,500	156,500	157,600
Part-time employment	40,000	45,600	47,600	45,500

(Source: CANSIM 282-0129, St. Catharines-Niagara Census Metropolitan Area)

TABLE 2: PROPORTIONS OF FULL-TIME AND PART-TIME EMPLOYMENT IN NIAGARA

Employment Status	2006	2011	2015	2016
Full-time employment	79.2%	76.7%	76.7%	77.6%
Part-time employment	20.7%	23.3%	23.3%	22.4%

(Source: CANSIM 282-0129, St. Catharines-Niagara Census Metropolitan Area)

LABOUR MARKET SUPPLY

The total number of clients assisted by Employment Ontario's Employment Services (ES) providers was 6,805 throughout the 2016-2017 fiscal year (i.e., April 2016 – March 2017).

In general, the majority of assisted clients were between the ages of 25-44 years old, as seen in Table 3, and had a broad range of previous employment experiences, as is demonstrated in Table 4. For example, some of the industries in which clients had previously worked were in accommodation and food services, manufacturing, retail trade, and construction. From an occupational point of view, the highest number of individuals had been employed in service support/other services occupations, service representatives/other customer and personal services, and trades helpers/construction labourers/related occupations.

Most of employment services clients (51.0%) have been out of employment or training for less than three months, and 77.5% have been out employment for 12 months or less. The majority of employment services clients have completed secondary school. Figure 3

compares the educational outcomes of ES clients in Niagara and Ontario. Compared to Niagara, a higher proportion of ES clients in Ontario hold post-secondary training. Niagara's ES client strengths are found in completed secondary school and college-level certificates and diplomas.

Throughout 2016, NWPB worked with our partners in Employment Services and Literacy and Basic Skills to present data and trends at the Niagara Employment Ontario Network Community Engagement Series. NWPB focused on data related to youth employment, Niagara's indigenous population and also local literacy and basic skills clients. These opportunities for discussion have been essential in helping NWPB shape its operation plan for the next three years, as seen on page 56.

TABLE 3: AGE COHORTS FOR NIAGARA ES CLIENTS, 2016 - 2017

Age	Number of Employment Services Clients	Percentage of Employment Services Clients
15-24	1,551	22.8%
25-44	2,891	42.5%
45-64	2,258	33.2%
65 and older	105	1.5%

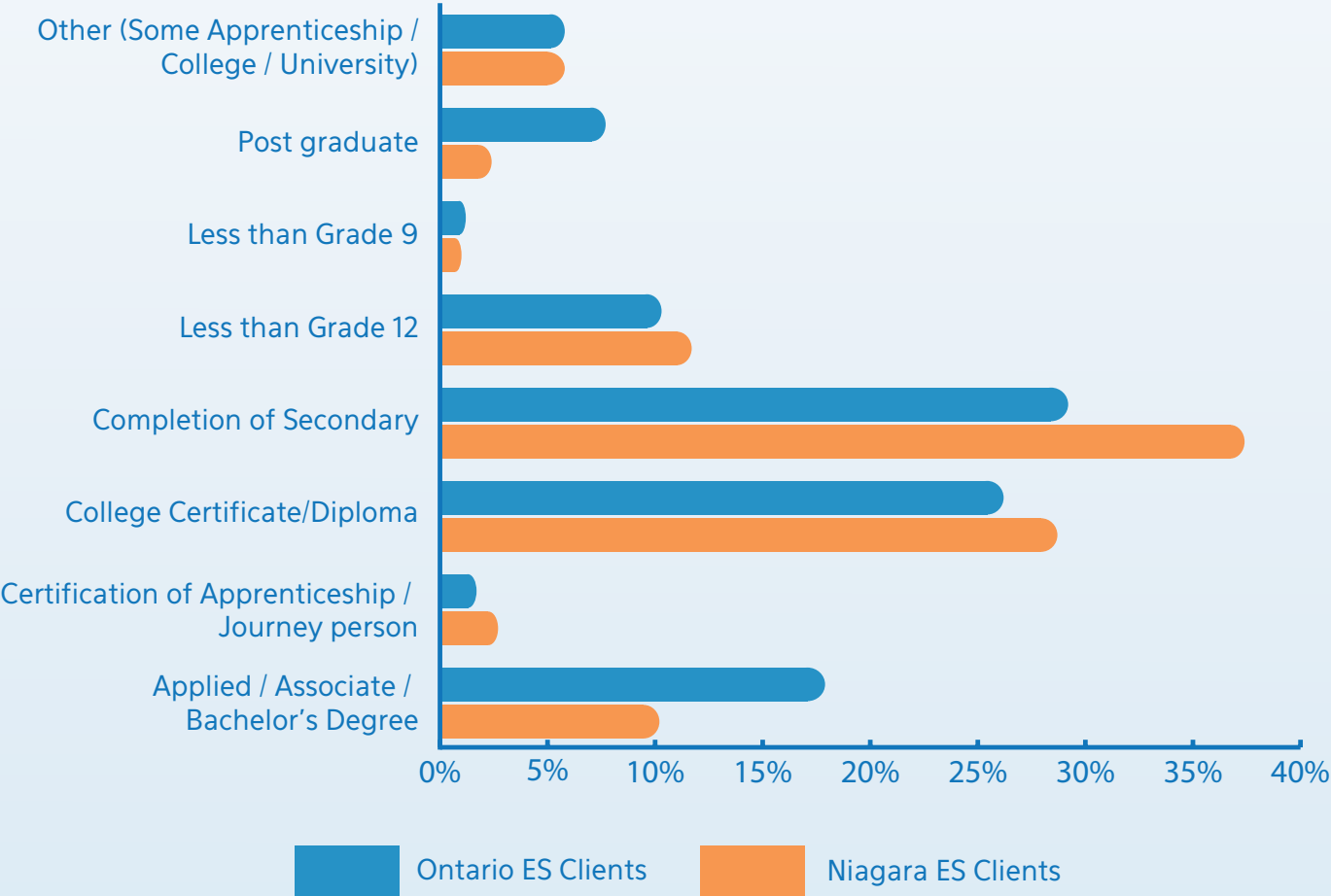
(Source: EOIS CAMS)

TABLE 4: TOP 10 OCCUPATIONS AT TIME OF LAYOFF FOR NIAGARA ES CLIENTS, 2016 - 2017

	Occupation at layoff
Service support and other service occupations	520
Service representatives and other customer and personal services occupations	403
Trades helpers, construction labourers and related occupations	347
Industrial, electrical and construction trades	340
Sales representatives and salespersons – wholesale and retail trade	308
Sales support occupations	267
Labourers in Processing, Manufacturing and Utilities	266
Service supervisors and technical service occupations	242
Office support occupations	219
Transport and heavy equipment operation and related maintenance occupations	210

(Source: EOIS CAMS)

FIGURE 3: EDUCATIONAL ATTAINMENT FOR ES CLIENTS IN ONTARIO AND NIAGARA, 2016 - 2017



(Source: EOIS CAMS)



LABOUR FORCE EDUCATION

Educational attainment measures an individual's highest level of formal education. These data are collected through the 2016 census. Because of methodology changes between the 2016 census and the 2011 National Household Survey, it is not possible to make direct historical comparisons between 2011 and 2016. Bearing this in mind, the data from the 2016 census have a much lower non-response rate than those of the National Household Survey. As such, the census' data likely offer a higher quality representation of educational patterns in Niagara and Ontario.

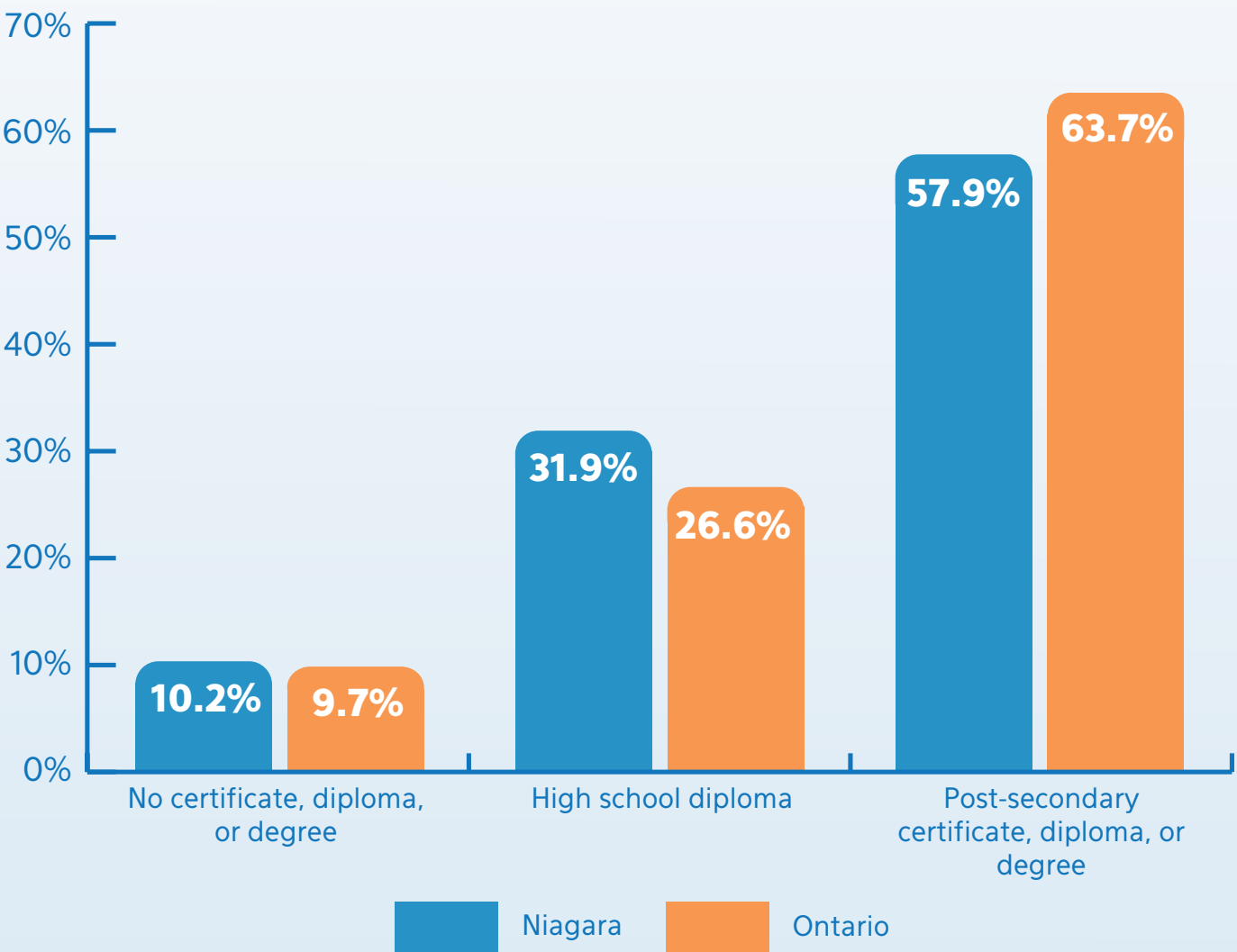
Figure 4 compares general educational outcomes for the labour force in Niagara to those observed in Ontario. Only 10.2% of Niagara's workforce, slightly more than one person in ten, has not completed any formal education. Approximately 31.9% of the individuals in Niagara's workforce have secondary school completion as their highest level of educational attainment - this figure is marginally higher than what is observed in Ontario. Similarly, Ontario's workforce has a higher proportion of post-secondary

completion than in Niagara (63.7% in Ontario compared to 57.9% in Niagara). Table 6 further breaks down these post-secondary qualifications among the workforce.

Based on the data in Table 6, Niagara's workforce offers a clear advantage in individuals with apprenticeship/trades training and college completion. Where nearly one third (33.0%) of Ontario's post-secondary trained workforce has a bachelor's degree as their highest level of education, slightly less than one quarter (24.6%) of Niagara's post-secondary trained workforce hold a university degree.

For clarification, university certificates above or below the bachelor's level, which account for 5.3% of post-secondary educational attainment, represent non-degree programs completed at a university. These programs typically offer a professional designation upon completion. Certificates above the bachelor's level reflect those programs which required a bachelor's degree as a prerequisite for enrollment.

FIGURE 4: LABOUR FORCE EDUCATIONAL ATTAINMENT



(Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016287, St. Catharines-Niagara CMA.)

TABLE 5: LABOUR FORCE EDUCATIONAL ATTAINMENT

Highest Level of Educational Attainment	Niagara	Ontario
No certificate, diploma, or degree	10.2%	9.7%
Secondary school diploma	31.9%	26.6%
Post-secondary qualification	57.9%	63.7%

(Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016287, St. Catharines-Niagara CMA)

TABLE 6: POST-SECONDARY LABOUR FORCE EDUCATIONAL ATTAINMENT

Highest Level of Post Secondary Educational Attainment	Niagara	Ontario
Apprenticeship or trades certificate or diploma	13.4%	9.3%
College certificate or diploma	48.3%	37.9%
University certificate or diploma below bachelor level	3.0%	3.6%
Bachelor's degree	24.6%	33.0%
University certificate or diploma above bachelor level	2.3%	3.1%
Degree in medicine, dentistry, veterinary medicine or optometry	1.0%	1.3%
Master's degree	6.4%	10.2%
Earned doctorate	0.9%	1.6%

(Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016287, St. Catharines-Niagara CMA)



(Photo credit: Wikimedia Commons, User:Balcer)

MIGRATION & POPULATION



A key step in understanding a local economy involves producing an overview of its population and demographic patterns. These areas are of the utmost importance to long-term planning because of the essential link between population and workforce patterns. A region whose population is shrinking could not reasonably expect to see a growing workforce. Likewise, a growing population is typically an indicator of a growing workforce.

Between 2006 and 2016, Niagara saw its population grow by 4.8%, from 427,421 to 447,888 (see Table 7). The average age of a Niagara resident in 2016 was 43.8 years compared to 41 years in Ontario.

Migration is likewise an essential measure of the health of the local labour market. Table 9 shows the 2010-2015 migration patterns for the Niagara region. The most in- and out-migration (or churn) can be seen in the 25-44 age group. Even though this age group accounts for the fewest net-migrants (i.e. the difference between people who move in and people who move out) they none the less show the greatest tendency to move. NWPB's *Region Building Series #2: Labour Mobility - Who's Coming, Who's Going?* explored some of the reasons why people tend to move from one region to another. Individuals aged 45-64 reflected the most net-migration into Niagara, and individuals 18-24 reflected Niagara's only net-negative migration.

TABLE 7: CENSUS POPULATION OF NIAGARA AND ONTARIO

Geography	2006 Population	2011 Population	2016 Population
Niagara	427,421	431,346	447,888
Ontario	12,160,282	12,851,821	13,448,494

(Source: 2016 Census Profile, Niagara region and Taxfiler)

TABLE 8: CHANGE OF POPULATION BETWEEN CENSUS YEARS IN NIAGARA & ONTARIO

Geography	2006-2011 % Change	2011-2016 % Change	2006-2016 % Change
Niagara	0.9%	3.8%	4.8%
Ontario	5.7%	4.6%	10.6%

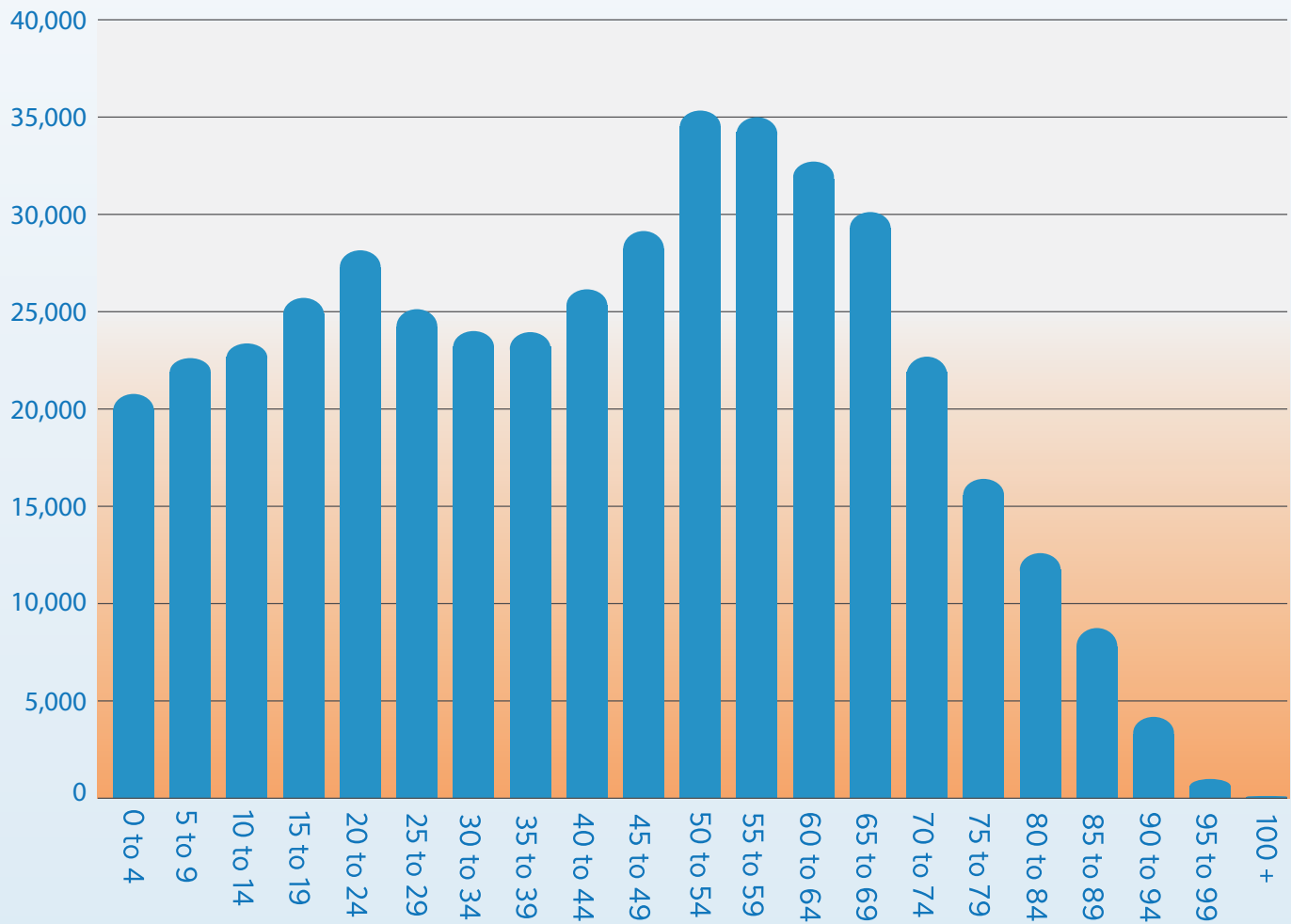
(Source: 2016 Census Profile, Niagara region and Taxfiler)

TABLE 9: NIAGARA'S FIVE-YEAR MIGRATION PATTERNS

Age Group	In-migrants	Out-migrants	Net-migrants
0-17	11,044	8,035	3,009
18-24	8,422	8,919	-497
25-44	20,978	19,587	1,391
45-64	14,002	8,646	5,356
65+	6,854	4,713	2,141
Total	61,300	49,900	11,400

(Source: 2016 Census Profile, Niagara region and Taxfiler)

FIGURE 5: AGE BREAKDOWN OF NIAGARA RESIDENTS IN 2016



(Source: 2016 Census Profile, Niagara region and Taxfiler)



INDUSTRY SIZE IN NIAGARA



The number of employers in the Niagara region are outlined in Tables 10 and 11. Note that these tables provide information only for establishments *with employees*.

Comparisons between the 2015 and 2016 employer landscapes can be seen in Tables 10 and 11. Information from December 2016 indicates that although there have been slight losses in “medium” sized employers (defined by Industry Canada as having between 100 and 499 employees), there has been growth in micro-employers (those employing between 1 and 4 people) and small employers with between 5 and 99 people in their workforce.

Of note, 97.8% of all businesses in both Niagara and Ontario can be accounted for by combining micro- and small businesses together. Small

businesses, therefore, are driving Niagara and Ontario's economies.

In general, Niagara's employer landscape is similar to what is seen for Ontario. Niagara has a smaller proportion of micro-businesses, businesses employing between 200-499 individuals, and large businesses than what is observed in Ontario. Conversely, Niagara has a slightly higher proportion of small businesses and businesses employing between 100 and 199 individuals than are seen in Ontario.

TABLE 10: SIZE OF ESTABLISHMENTS BY NUMBER OF EMPLOYEES IN NIAGARA, 2015 - 2016

Establishment Size, Number of Employees	Number of Establishments, December 2015	Number of Establishments, December 2016	2015-2016 Absolute Change	2015-2016 Percentage Change
1-4	6,245	6,283	38	0.6%
5-9	2,509	2,610	101	4.0%
10-19	1,647	1,700	53	3.2%
20-49	1,167	1,206	39	3.3%
50-99	368	379	11	3.0%
100-199	175	178	3	1.7%
200-499	74	67	-7	-9.5%
500 +	26	25	-1	-3.8%
Total	12,211	12,448	237	1.9%

(Source: 2015, 2016 Canadian Business Counts)

TABLE 11: BREAKDOWN OF ESTABLISHMENT SIZE FOR NIAGARA AND ONTARIO, 2016

Establishment Size	Niagara 2016 % of all businesses	Ontario 2016 % of all businesses
1-4 employees	50.5%	58.7%
5-9 employees	21.0%	17.4%
10-19 employees	13.7%	11.3%
20-49 employees	9.7%	7.7%
50-99 employees	3.0%	2.7%
100-199 employees	1.4%	1.2%
200-499 employees	0.5%	0.7%
500 + employees	0.2%	0.3%
Total	100.0%	100.0%

(Source: 2015, 2016 Canadian Business Counts)

INDUSTRY OF EMPLOYMENT

TABLE 12 - TOTAL EMPLOYMENT IN NIAGARA

St. Catharines-Niagara CMA	2006	2011	2015	2016
Total Employment in Niagara	192,800	196,100	204,100	203,100

(Source: CANSIM 282-0131, St. Catharines-Niagara Census Metropolitan Area)

TABLE 13 - HISTORICAL TOTAL EMPLOYMENT CHANGE

St. Catharines-Niagara CMA	2006-16	2011-16	2015-16
Employment Change	5.3%	3.6%	-0.5%

(Source: CANSIM 282-0131, St. Catharines-Niagara Census Metropolitan Area)

The St. Catharines-Niagara Census Metropolitan Area (CMA) remained generally consistent between 2015 and 2016 in terms of sectoral and total employment shifts. Total employment, seen in Table 12, in 2016 fell by 0.5%, or 1,000 individuals reporting employment, compared to the 2015 figures. This trend has likely contributed to the change in the local employment and unemployment rate, observed on page 8.

Despite this decline, the five- and ten-year historical patterns for the CMA continue to reflect growth. Since 2006, a 5.3% increase in local total employment amounted to an additional 10,300 individuals reporting employment. Total employment in 2015 and 2016 both reflect employment

levels higher than those seen in the decade preceding the 2008-2009 recession.

Figure 6 illustrates the balance between employment in the goods-producing and services-producing sectors in Niagara. Employment within the goods-producing sector is typically found in resource extraction (i.e. mining), agriculture, construction, and manufacturing. 2006 saw employment in the goods-producing sector represent nearly one quarter of employment in Niagara. Recent years, however, have seen the balance to a point where the goods-producing sector represents approximately one fifth of employment in Niagara. Though this is a relatively

FIGURE 6: EMPLOYMENT IN GOODS-PRODUCING VERSUS SERVICES-PRODUCING SECTOR IN NIAGARA



(Source: CANSIM 282-0131, St. Catharines-Niagara Census Metropolitan Area)

significant change over a ten-year period, it is very consistent with the

provincial trend and the narratives of many other municipalities in Ontario.

TABLE 14: TOP 10 EMPLOYMENT INDUSTRIES IN THE ST. CATHARINES-NIAGARA CMA, 2006 - 2016

Industry	2006	2011	2015	2016
Wholesale and retail trade	31,900	32,900	34,800	34,200
Health care and social assistance	19,400	24,100	23,900	28,000
Accommodation and food services	18,800	19,900	24,800	24,600
Manufacturing	27,100	21,000	18,300	19,100
Construction	12,600	13,700	18,000	17,100
Educational services	11,500	15,400	14,600	12,200
Information, culture and recreation	12,500	10,100	9,300	10,900
Business, building and other support services	12,100	9,300	14,800	10,700
Public administration	7,800	8,500	7,500	8,900
Transportation and warehousing	8,400	9,100	7,400	8,700

(Source: CANSIM Table 282-0131)

Table 14 provides a historical overview of local industry employment. In 2016, Niagara's three largest industries were wholesale and retail trade, health care and social assistance, and accommodation and food services. Combined, these three industries comprised 42.7% of all employment for people living in Niagara in 2016.

The industries of agriculture and public administration saw exceptional local growth between 2015 and 2016. Between 2011 and 2016, construction in Niagara saw a 24.8% increase in employment compared to 10.8% in Ontario, and

accommodation and food services grew by 23.6% in Niagara but only by 13.5% in Ontario.

Table 15 presents the 2016 provincial location quotients for Niagara's industry sectors. Location quotients allow us to measure which industries are particularly unique within a region. A location quotient of 1.00 means that the local industry has the same concentration of employment as that of the province; in other words, we are "par for the course" in terms of the concentration of employment in that industry.

TABLE 15: INDUSTRY LOCATION QUOTIENTS FOR ST. CATHARINES-NIAGARA CENSUS METROPOLITAN AREA, 2016

Industry	2016 Location Quotient
Agriculture	1.64
Forestry, fishing, mining, quarrying, oil and gas	n/a
Utilities	n/a
Construction	1.17
Manufacturing	0.88
Wholesale and retail trade	1.14
Transportation and warehousing	0.92
Finance, insurance, real estate, rental and leasing	0.53
Professional, scientific and technical services	0.46
Business, building and other support services	1.13
Educational services	0.84
Health care and social assistance	1.15
Information, culture and recreation	1.18
Accommodation and food services	1.86
Other services (except public administration)	0.89
Public administration	0.87

(Source: CANSIM Table 282-0131; NWPB Calculations)

The higher the location quotient, the more unique a region is considered to be with respect to a given industry. Accommodation and food services' location quotient of 1.86 means that this sector is almost twice as concentrated in Niagara as it is in Ontario. Professional, scientific and technical services' location quotient of 0.46 means that employment in

this industry is almost half as concentrated in Niagara as it is in the province.

SME INDUSTRIES



Outlined in Tables 16 and 17 are the job counts and business counts for the Top 15 Small-Medium Enterprise (SME) Industries in the Niagara region.

Table 16 allows for the comparison of job counts between 2015 and 2016. In general, trends indicate growth across many of the Top 15 SME industries. There have, however, been some losses in a few industries, namely truck transportation,

administrative and support services, and religious, grant-making, civic, professional and similar organizations.

Table 17 outlines the number of businesses (with employees), for each of the Top 15 SME Industries.

TABLE 16: JOB ESTIMATES FOR THE TOP 15 SMALL-MEDIUM ENTERPRISE INDUSTRY SUBSECTORS IN THE NIAGARA REGION, 2015 - 2016

Top 15 SME Industries, Niagara Region	2015 Job Estimates	2016 Job Estimates	2015-2016 Absolute Change	2015-2016 Percentage Change
Farms	3,167	3,215	48	1.5%
Construction of buildings	2,315	2,552	237	10.2%
Specialty trade contractors	7,079	7,246	167	2.4%
Food and beverage stores	6,597	6,789	192	2.9%
Clothing and clothing accessories stores	1,727	1,983	256	14.9%
Miscellaneous store retailers	1,623	1,716	93	5.7%
Truck transportation	1,872	1,827	-44	-2.4%
Real estate	2,269	2,335	66	2.9%
Professional, scientific and technical services	5,154	5,377	223	4.3%
Administrative and support services	8,397	8,380	-17	-0.2%
Ambulatory health care services	5,664	6,179	515	9.1%
Food services and drinking places	14,986	16,053	1067	7.1%
Repair and maintenance	2,069	2,096	27	1.3%
Personal and laundry services	2,188	2,215	27	1.2%
Religious, grant-making, civic, and professional and similar organizations	3,170	2,839	-331	-10.4%

(Source: EMSI Analyst)

TABLE 17: NUMBER OF BUSINESSES WITH EMPLOYEES FOR THE TOP 15 SMALL-MEDIUM ENTERPRISE INDUSTRY SUBSECTORS IN THE NIAGARA REGION, 2015 - 2016

Top 15 SME Industries	2015 Total, with employees	2016 Total, with employees	2015-2016 Absolute Change	2015-2016 Percentage Change
Farms	454	458	4	0.9%
<i>Crop production</i>	343	353	10	2.9%
<i>Animal production & aquaculture</i>	111	105	-6	-5.4%
Construction of buildings	354	397	43	12.1%
Specialty trade contractors	1021	1067	46	4.5%
Food and beverage stores	268	290	22	8.2%
Clothing and clothing accessories stores	255	267	12	4.7%
Miscellaneous store retailers	212	211	-1	-0.5%
Truck transportation	253	281	28	11.1%
Real estate	378	391	13	3.4%
Professional, scientific and technical services	893	945	52	5.8%
Administrative and sup- port services	495	512	17	3.4%
Ambulatory health care services	916	951	35	3.8%
Food services and drinking places	911	972	61	6.7%
Repair and maintenance	410	413	3	0.7%
Personal and laundry services	293	295	2	0.7%
Religious, grant-making, civic, and professional and similar organizations	452	444	-8	-1.8%

(Source: Canadian Business Counts)



ZERO-EMPLOYEE FIRMS



Zero-employee firms are those that best represent self-employment in the Niagara region. Based on the Statistics Canada definition, an organization, be it a for-profit, non-profit, or charity, is considered a zero-employee firm if all of its work is carried out by the owner, the owner's immediate family, or temporary contractors. These establishments also include independent contractors, even if they are operating under a larger corporate brand. Because of these factors, zero-employee firms can represent a very diverse range of employment patterns.

As of December 2016, there were 21,595 zero-employee firms in Niagara where NWPB could identify a North American Industrial Classification System (NAICS) code. This figure represents a 0.2% decrease from Niagara's 2015 figure of 21,632 establishments.

Table 18 shows the most numerous industry subsectors for zero-employee firms. As of December 2016, real estate accounted for 28.2% Niagara's self-employment/zero-employee footprint. Despite a year-over-year decrease of 1.7% the number of these firms, they continue to outnumber firms in professional, scientific, and technical services, the second most numerous self-employment industry.

In terms of the largest absolute growth, securities, commodity contracts, and financial investment firms added 307 additional businesses between 2015 and 2016. Management of companies, which is no longer reflected among top zero-employee industry subsectors, shrunk by 350 firms (representing 58.1% of its 2015 firm count).

TABLE 18: TOP INDUSTRY SUBSECTORS FOR ZERO-EMPLOYEE FIRMS

Industry	Niagara 2015	Niagara 2016
Real estate	6,216	6,109
Professional, scientific and technical services	2,242	2,271
Specialty trade contractors	1,268	1,296
Securities, commodity contracts, and other financial investment and related activities	915	1,222
Ambulatory health care services	902	867
Administrative and support services	784	777
Construction of buildings	706	728
Crop production	672	630
Truck transportation	566	571
Personal and laundry services	519	537
Repair and maintenance	493	490
Religious, grant-making, civic, and professional and similar organizations	365	451

(Source: Canadian Business Counts)

OCCUPATION OF EMPLOYMENT

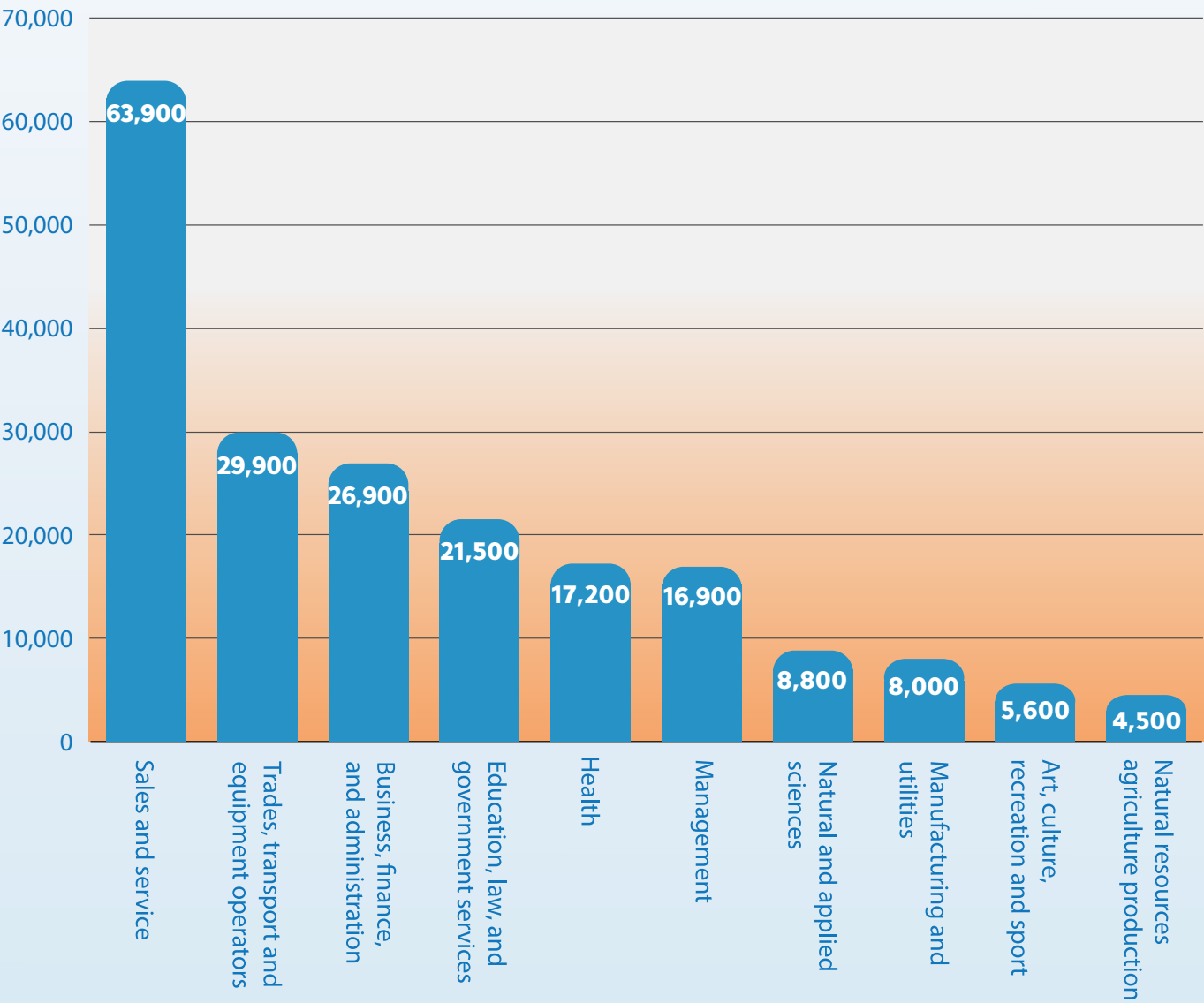


These data add further detail to the type of work that Niagara's residents are doing. Figure 7 shows a summary of the occupations that existed in Niagara in 2016. Roughly 2 out of 3 people working in Niagara can be found within three sectors: sales and service occupations, trades transport and equipment operating occupations, and business finance and administration occupations.

The data in Table 19 adds an additional layer of detail to Niagara's occupations. At a 2-digit NOC level, we can see that 51.8% of all of Niagara's employed individuals fall within eleven occupational classifications. Table 20 reflects which industries have seen the most employment change over the previous year, five years, and ten years.

In terms of near-term growth, occupations of note include transportation and heavy equipment operation, which added 1,500 employed individuals between 2015 and 2016, wholesale and retail sales representatives, which added 1,100 employed individuals, and occupations in maintenance and equipment operation trades, which added 800 employed individuals. Over the longer term, service supervisors and specialized service occupations added 3,800 employed individuals between 2006-2016, which accounts for 48.7% growth in 2016 compared to the previous ten years.

FIGURE 7 - NIAGARA EMPLOYMENT OVERVIEW - 1-DIGIT NATIONAL OCCUPATION CLASSIFICATION GROUPS



(Source: Statistics Canada, CANSIM 282-0159, St. Catharines-Niagara CMA)

**TABLE 19: NIAGARA EMPLOYMENT OVERVIEW -
2-DIGIT NATIONAL OCCUPATION CLASSIFICATION**

Occupation	2006 employment	2011 employment	2015 employment	2016 employment
Service support & other service occupations	12,400	13,200	14,800	13,300
Service representatives & other customer & personal services occupations	13,600	12,000	14,000	12,900
Service supervisors & specialized service occupations	7,800	9,600	12,500	11,600
Sales representatives and salespersons - wholesale and retail trade	11,300	9,900	10,000	11,100
Industrial, electrical and construction trades	10,100	10,100	11,900	10,500
Sales support occupations	9,700	9,600	8,800	9,000
Transport & heavy equipment operation & related maintenance occupations	7,000	7,000	7,400	8,900
Administrative & financial supervisors & administrative occupations	6,200	7,800	9,500	7,700
Middle management occupations in retail & wholesale trade & customer services	8,600	9,100	8,400	7,100
Office support occupations	8,000	8,000	6,600	6,900
Maintenance and equipment operation trades	6,600	6,900	5,600	6,400

(Source: Statistics Canada, CANSIM 282-0159, St. Catharines-Niagara CMA)

**TABLE 20: NIAGARA EMPLOYMENT OVERVIEW -
2-DIGIT NATIONAL OCCUPATION CLASSIFICATION**

Occupation	2006-2016 change	2011-2016 change	2015-2016 change
Service support and other service occupations	7.3%	0.8%	-10.1%
Service representatives and other customer and personal services occupations	-5.1%	7.5%	-7.9%
Service supervisors and specialized service occupations	48.7%	20.8%	-7.2%
Sales representatives and salespersons - wholesale and retail trade	-1.8%	12.1%	11.0%
Industrial, electrical and construction trades	4.0%	4.0%	-11.8%
Sales support occupations	-7.2%	-6.3%	2.3%
Transport and heavy equipment operation and related maintenance occupations	27.1%	27.1%	20.3%
Administrative and financial supervisors and administrative occupations	24.2%	-1.3%	-18.9%
Middle management occupations in retail and wholesale trade and customer services	-17.4%	-22.0%	-15.5%
Office support occupations	-13.8%	-13.8%	4.5%
Maintenance and equipment operation trades	-3.0%	-7.2%	14.3%

(Source: Statistics Canada, CANSIM 282-0159, St. Catharines-Niagara CMA)

COMMUTER FLOWS



As seen in Table 21, the majority of employed individuals in the St. Catharines-Niagara CMA's labour force travel to work within the CMA.

Among the workforce that leave the CMA for work, the top destinations include the Hamilton, Toronto, and Kitchener-Cambridge-Waterloo CMAs.

TABLE 21: TOP PLACE OF WORK FOR EMPLOYED INDIVIDUALS AGES 15 YEARS AND OLDER, LIVING IN THE ST. CATHARINES-NIAGARA CMA

Top Places of work (CMA)	Number that Commute from Niagara CMA	% that Commute from Niagara CMA
St. Catharines - Niagara	133,775	88.0%
Hamilton	11,145	7.3%
Toronto	5,725	3.8%
Kitchener - Cambridge - Waterloo	430	0.3%
Guelph	185	0.1%
Brantford	180	0.1%
London	155	0.1%
Ottawa - Gatineau	140	0.1%
Oshawa	80	0.1%
Norfolk	50	0.03%
Montréal	45	0.03%
Wood Buffalo	40	0.03%
Barrie	35	0.02%
Woodstock	30	0.02%
Kingston	20	0.01%
Sarnia	20	0.01%
Greater Sudbury / Grand Sudbury	20	0.01%
Vancouver	20	0.01%
Total	152,095	100.0%

(Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016327)

LOCAL JOB DEMAND PROFILE

In addition to delivering our annual Employer One survey, NWPB uses a state of the art aggregation tool called Talent Neuron to gain a better understanding of job demand in Niagara. Job demand generally encompasses the positions, skills, and experiences that employers are seeking when they post a job vacancy. Though our data are comprehensive, they only help us understand jobs where there is a public-facing job posting. Job postings that exist on password protected or internal job boards are not captured in these data. Likewise, jobs that are filled through informal business networks or referrals are not captured in these data.

Of the 16,300 public-facing job postings we could track in 2016, 60.0% advertised jobs in St. Catharines. Niagara Falls and Welland accounted for 16.3% and 7.4%, respectively, of regional job demand. Combined, these three municipalities housed 83.8% of the local demand NWPB could track through our system.

Table 22 represents occupations that amounted to at least two percent of total measurable job demand for Niagara in 2016. Retail salespersons, motor vehicle and transit drivers, and chefs and cooks represented the top three tracked occupations. Overall, occupations in sales and service accounted for 40.5% of total job demand in Niagara. A general occupational breakdown is seen in Table 23.

Our data also allow us to examine the in-demand skills that employers identify within their job postings. Table 24 presents the most frequently sought after interpersonal skills within job postings. It is entirely expected that multiple skills will be represented in an individual job posting. For example, a single job posting might ask for a candidate who is detail oriented, a team player, and in possession of superior oral and written skills. Therefore these data will not total to 100% as they are simply a reflection of what percentage of job postings mention a given skill.

TABLE 22: TOP OCCUPATIONS IN NIAGARA, 2016

Occupation	2016 jobs
Retail salespersons	970
Motor vehicle and transit drivers	680
Chefs and cooks	651
Retail sales supervisors	604
Cleaners	599
Food counter attendants, kitchen helpers and related support occupations	599
Service supervisors	552
Customer and information services representatives	518
Auditors, accountants and investment professionals	459
Occupations in food and beverage service	447
Assisting occupations in support of health services	412
Agriculture and horticulture workers	354
Sales and account representatives - wholesale trade (non-technical)	349
Supply chain logistics, tracking and scheduling co-ordination occupations	334

(Source: CEB TalentNeuron)

Skills & Training:

With support from MAESD, NWPB was able to form an Advanced Manufacturing Partnership (AMP). The AMP was created via NWPB's relationship with the Niagara Industrial Association (NIA) which led to engagement from local manufacturers and Niagara Region's Economic Development department.

Initial meetings with employers and secondary school educators suggested some potential misalignment between the skills profile of youth entering the job market and the expectations of the workplace. In response, NWPB conducted a study comparing local supply & demand in advanced manufacturing.

This included investigating historical trends in supply and demand, required hard- and soft-skills identified by employers, and educational attainment.

These data were presented at a community event facilitated by the NIA. A main outcome of this project was to begin addressing labour supply and skill shortages through increased youth recruitment activities. Given that many industry sectors face these same issues, NWPB will be developing a Youth Employment Strategy to help youth in Niagara engage with the local labour force.

TABLE 23: GENERAL OCCUPATION BREAKDOWN

Major Occupation Group	Job Postings	Percentage
Sales and service	6,597	40.5%
Trades, transport and equipment operators	2,323	14.3%
Business, finance and administration	1,858	11.4%
Health	1,019	6.3%
Management	889	5.5%
Natural and applied sciences	731	4.5%
Occupations in education, law and social, community and government services	709	4.3%
Natural resources, agriculture	421	2.6%
Manufacturing and utilities	404	2.5%
Art, culture, recreation and sport	261	1.6%
Unclassified occupation	1,079	6.6%
Unavailable	9	0.1%

(Source: CEB TalentNeuron)

TABLE 24: TOP IN-DEMAND SKILLS FOR JOB POSTINGS IN NIAGARA, 2016

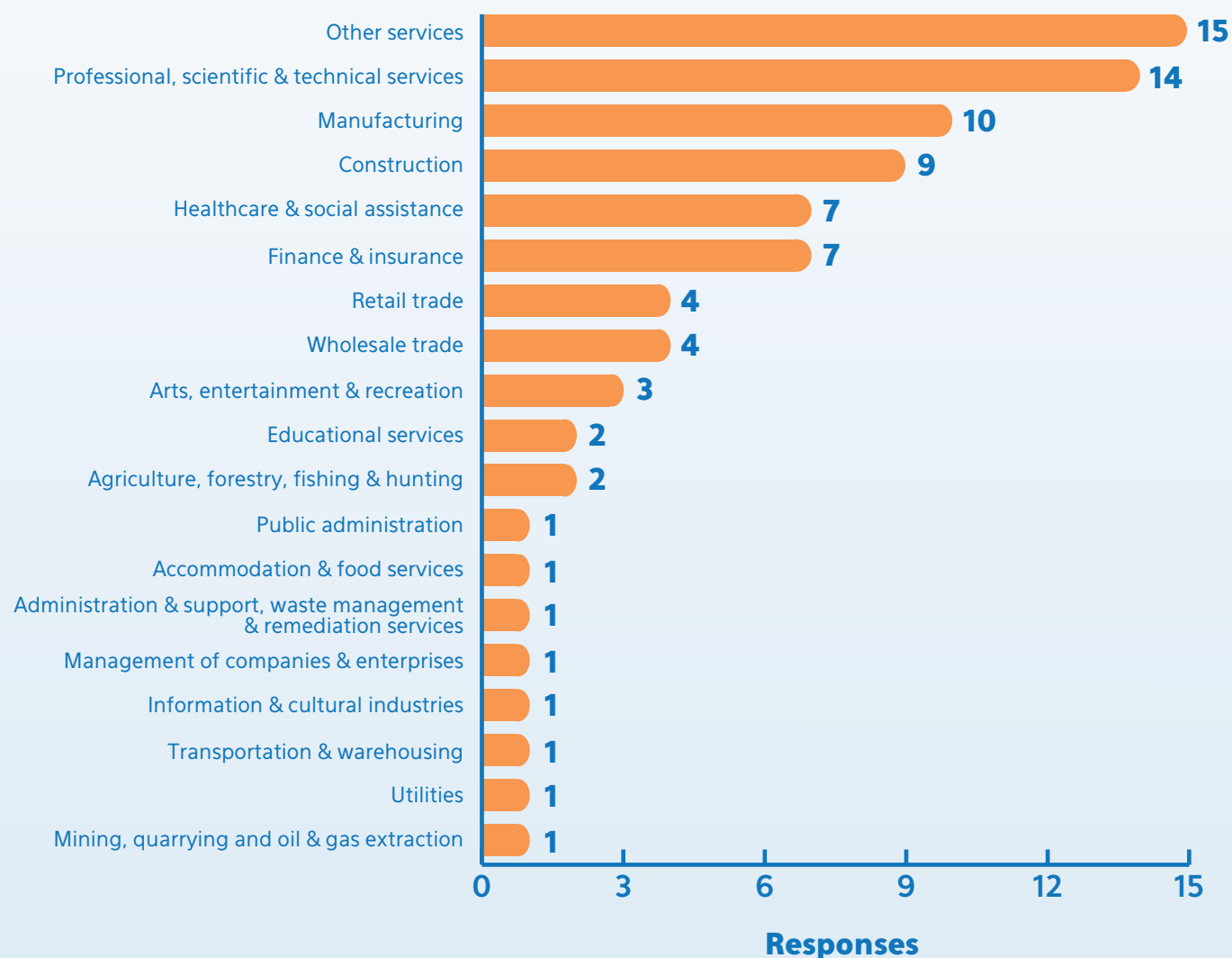
Skill	Occurrence in Job Postings
Detail oriented	15.7%
Oral and written communication	15.6%
Team player	15.3%
Clean Criminal Record	7.8%
Marketing	7.5%
Customer service oriented	6.9%
Dependability	6.9%
Problem solving	6.6%
High Energy	5.3%
Integrity	5.3%

(Source: CEB TalentNeuron)



EMPLOYER ONE SUMMARY

FIGURE 8: INDUSTRIES REPRESENTED IN THE EMPLOYER ONE SURVEY



(Source: Employer One Survey)

Every year NWPB delivers the Employer One survey as part of our mandate to gather up-to-date labour market insights from local employers. This survey aids in the understanding of hiring and labour demand challenges facing local employers within the for-profit, not-for-profit, and charity sectors.

The employers who completed the survey represented a range of industry sectors, as seen in Figure 8.

TABLE 25: TOP REASONS FOR HARD-TO-FILL POSITIONS AMONG EMPLOYER ONE RESPONDENTS

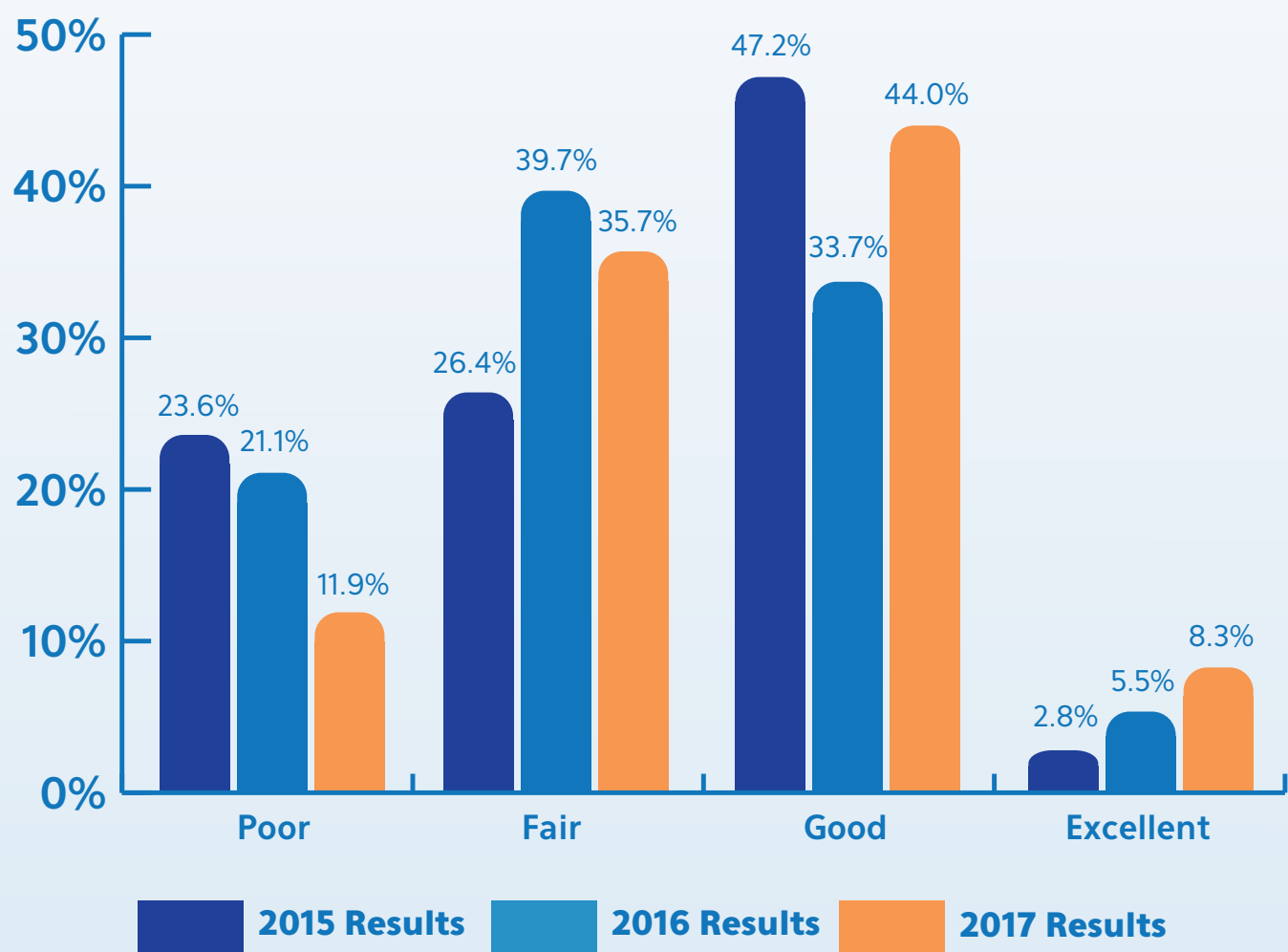
Employer One 2015	Employer One 2016	Employer One 2017
Applicants not meeting skills	Insufficient applicants	Lack of qualifications
Applicants not meeting work experience	Applicants not meeting technical skill requirements	Lack of technical skills
Applicants not meeting motivation, attitude, or interpersonal abilities	Applicants lacking qualifications (education level/credentials/et cetera)	Not enough applicants

(Source: Employer One Survey)

In 2017 we found that 81% of employers who completed the survey reported doing hiring in 2016. Among those respondents, 42% reported that they hired for hard-to-fill positions. For the purposes of Employer One, a hard-to-fill job is any job where the time it took to hire a candidate took longer than was originally planned.

Table 25 summarizes the top reasons why employers found positions hard to fill for the previous three years.

FIGURE 9: RATINGS OF THE AVAILABLE LABOUR FORCE AMONG EMPLOYER ONE RESPONDENTS



(Source: Employer One Survey)

Each year Employer One asks employers to rate their perception on the quality of the available labour force in Niagara. Our 2017 results saw employers rate almost 80% of the

skilled labour force in Niagara as either “good” or “fair.” Figure 9 shows 2017 and historical trends for this question.



PARTNERSHIP UPDATES

PARTNERSHIP: EMPLOYER EDUCATOR EXPERIENCE (E3)

Action	Outcomes
Develop a pilot experiential learning day for Niagara Catholic District School Board in fiscal 2017-2018, and continue delivering this program with their feedback.	In February 2017, a pilot program was successfully delivered with 27 educators from the Niagara Catholic District School Board (NCDSB) working with 13 partner employers. NWPB committed to running the program again with the NCDSB in February 2018.
Review feedback and implement improvements for 2017-18 delivery with both English-language school boards in Niagara.	Upon the review of participant feedback, NWPB made significant changes to the delivery of the Employer Educator Experience program. These changes included facilitating comprehensive labour market data to educators prior to their learning day as a means of ensuring productive discussion with their host employer. After these changes were implemented, NWPB received strong positive feedback from program participants and school board partners.
Expand project to include greater number of teachers in both District School Board of Niagara (DSBN) and NCDSB, as well as greater number of participating employers	NWPB expanded its commitment on this program to the DSBN, which saw 37 educators participating and included 17 employer partners. NWPB staff delivered labour market presentations as part of professional development activities for educators not participating in the on-site Employer Educator Experience sessions. With this added program element, NWPB was able to reach more teachers and in turn promote evidence-based career planning for Niagara's students.

PARTNERSHIP: EMPLOYER ONE SURVEY

Action	Outcomes
2017 survey delivery	NWPB's delivery of a comprehensive Employer One survey in 2017 resulted in 88 completions. These data, though useful, did not meet a test for statistical significance at a regional level. As a result, NWPB explored options for revising the survey and increasing completion and building new partnerships to increase completion.
Partnership with Niagara Region in targeting employers willing to engage in evidence-based research	In an effort to better align data gathering activities with other organizations engaged in this type of work, NWPB formed a strategic partnership with Niagara Region's Planning Department. Regional Planning's Employer Inventory survey identified those employers who would be willing to complete Employer One. NWPB's marketing activities were revised with outreach to these employers as a top priority.
Survey revisions and 2018 delivery	The survey was streamlined and re-written with ease of completion in mind. These changes were included in the marketing and promotions language surrounding the survey. Preliminary survey analysis has indicated more than 200 completions following these changes. Results from the 2018 delivery will be available in March 2018.

PARTNERSHIP: SKILLS MATCHING DATA FOR LITERACY AND BASIC SKILLS AND EMPLOYMENT SERVICES CLIENTS

Action	Outcomes
Creation of quarterly job demand reports	To support the efforts of employment services providers and literacy and basic skills providers, NWPB developed a series of quarterly job demand reports. These reports focused on the most commonly occurring job opportunities that existed in Niagara that required, at a maximum, the completion of high school.
Creation of comprehensive job profiles for in-demand occupations	NWPB's quarterly job demand reports informed a trend analysis that allowed us to identify five specific occupations that were in the most consistent demand in Niagara. Our job profiles drilled down into these occupations, and offered greater insights on where these jobs existed in Niagara, the skills in demand for these occupations, and expected compensation for these occupations.

PARTNERSHIP: REGION BUILDING SERIES

Action	Outcomes
Established new research partnerships.	As part of NWPB's mission to bring partners together to develop innovative labour market research and solutions, NWPB formed a strategic partnership with Brock University's Niagara Community Observatory and Niagara College. This partnership was cemented in a five-year memorandum of understanding.
Produced comprehensive research on labour mobility	Working with our research partners and engaging staff at Niagara Region, NWPB partnered with Community Benchmarks on a project to understand labour mobility in Niagara. This research identified the areas where Niagara "does business" in terms of population in-flow and out-flow.
Producing comprehensive research on commuting flows in and about Niagara	Data from the 2016 census allows us to understand commuting patterns within Niagara, as well identify the outside municipalities where Niagara's workforce goes to work. We anticipate pairing this data with occupational data to build a profile on what occupations and industries are pulling Niagara's workforce out of the region.

ACTION PLAN



Niagara Workforce Planning Board has undergone considerable transformation over the previous two years. We have expanded our community partnerships, energized our Board of Directors, and enhanced our ability to work with local labour market data. With these changes in mind, we have developed a new

action plan to guide our partnerships and community involvement. This action plan will focus on the areas of experiential learning, workforce skills alignment, and community-driven research.

EXPERIENTIAL LEARNING AND YOUTH EMPLOYMENT

Rationale: NWPB completed several projects in the last three years that highlighted the need for an increased focus on experiential learning and increased investment in activities that provide youth with meaningful job experiences while they are still in education and training. Our Advanced Manufacturing Partnership, for example, identified a need for increased employment in manufacturing

industries to address anticipated retirements within the next ten years. At the same time, our consultations with local manufacturers suggested they work within a challenging climate for recruitment. NWPB believes that targeting its activities toward experiential learning and youth employment will allow us to contribute to an ongoing priority for community partners.

Priority	Goal	Strategy	Proposed Partners
Short term	Gain a comprehensive understanding of youth employment through the release of updated 2016 census data.	<ul style="list-style-type: none"> Mobilize partnerships with Brock University and the Niagara Community Observatory to update a recent policy brief that examined the state of youth employment and education in Niagara. 	Brock University's Department of Geography, Brock University's Niagara Community Observatory
Medium term	Increase youth access to labour market data and build connections between educators and employers.	<ul style="list-style-type: none"> Deliver learning programs to local educators to build meaningful channels for communicating with local employers. Build labour market information toolkits that show in-demand skills and local job trends to inform career planning in all stages of an individual's education and training. 	District School Board of Niagara, Niagara Catholic District School Board
Long term	Create a system that will allow multiple stakeholders in Niagara to work toward increasing employment and training outcomes.	<ul style="list-style-type: none"> NWPB proposes the creation of a comprehensive youth employment and engagement strategy. This document will act as a master plan for any stakeholder who wishes to engage in increasing youth employment and training outcomes. It will allow smaller organizations seeking grant funding to offer applications without engaging in preliminary consultation and stakeholder engagement. This approach, when adopted by the local community, will also ensure that there is alignment of services and reduction of program and service duplication. 	Niagara Region Economic Development Department

WORKFORCE SKILLS ALIGNMENT

Rationale: Research has indicated that small-to-medium sized communities often feel the ramifications of skills misalignment harder than their larger counterparts. Recognizing that Niagara is both a regional economy, and a collection of smaller municipally-focused economies – each with

their own labour market supply and demand challenges – NWPB is committed to meeting the Ministry of Advanced Education and Skills Development's strategic priority of supporting a flexible workforce that can respond to changing economic needs and expectations.

Priority	Goal	Strategy	Proposed Partners
Short term	Develop a high-level annual indicator of skills demand among local employers that can be responsibly extrapolated to reflect the Niagara region as a whole.	<ul style="list-style-type: none"> Refine and rebrand the Employer One survey to hold a tighter focus on employer skill needs. A refined survey will have the impact of increasing participation and creating an understanding of skills that can be meaningfully extrapolated and shared with local partners who develop skills training programs. 	Niagara Region Planning Department
Medium term	Promote a culture of training for technical and interpersonal skills that are in-demand within the local employer base.	<ul style="list-style-type: none"> Expand the current job demand program that NWPB provides to Employment Services and Literacy and Basic Skills Providers to include data on in-demand skills. Develop mechanisms that allow service providers to identify hiring trends within their organizations that would lead to NWPB creating skills profiles that match those positions. 	Local Employment Services providers and Literacy and Basic Skills Providers
Long term	Build capacity for scientific and data-driven discussions on skills alignment across multiple regions to identify trends and patterns that affect multiple urban and rural areas in Ontario.	<ul style="list-style-type: none"> With our Employer One tool refined and broadly adopted, we will work to coordinate efforts across the Workforce Planning West Local Boards to build a picture of skills demand issues that occur throughout south-western Ontario. This would require renewed partnerships with post-secondary institutions to support the local boards in review and analysis of this data. 	Workforce Planning West Local Boards, Academic Partners to be determined.

COMMUNITY-DRIVEN RESEARCH

Rationale: Recent years have seen a considerable increase in NWPB's value to the Niagara region as a trusted source for labour market data and research. This is reflected in our recent partnership with Niagara College and Brock University's Niagara Community Observatory. NWPB will continue to work to

advance this reputation through expanding our research interests and partnerships. These projects will reflect a strong stakeholder investment and produce outcomes that will have the potential for affecting change at a local level.

Priority	Goal	Strategy	Proposed Partners
Short term	Gain a better understanding of the employer-identified skill needs within the industry cluster that supports local agriculture and crop production.	<ul style="list-style-type: none"> • Develop an employer engagement survey that will allow for one-on-one meetings between NWPB staff and employers in industries that support agriculture. • Deploy the survey and prepare a launch event for the results. 	Niagara Region, Brock University Niagara Community Observatory
Medium term	Building on research completed in 2017-18, NWPB has identified a need to better understand labour mobility as an essential missing piece to understanding how commuter flow affects the local workforce.	<ul style="list-style-type: none"> • Review custom 2016 census data to produce a comprehensive report of the industries and occupations where Niagara's commuting labour force finds employment. • Expand job demand research to areas of high commuter flow to understand where Niagara might be able to position itself for more competitive economic development projects. 	Niagara Region, Community Benchmarks
Long term	Understand the opportunities for home grown employer successes and industry/cluster development.	<ul style="list-style-type: none"> • Work with Niagara College's Productivity and Innovation lab to explore the data that would support cluster and sub-sector based opportunities for local growth. In determining these indicators at a local level, we could potentially develop tools that could be used as a best practice in other communities. 	Niagara College

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NOTES

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