NIAGARA
WORKFORCE
PLANNING BOARD

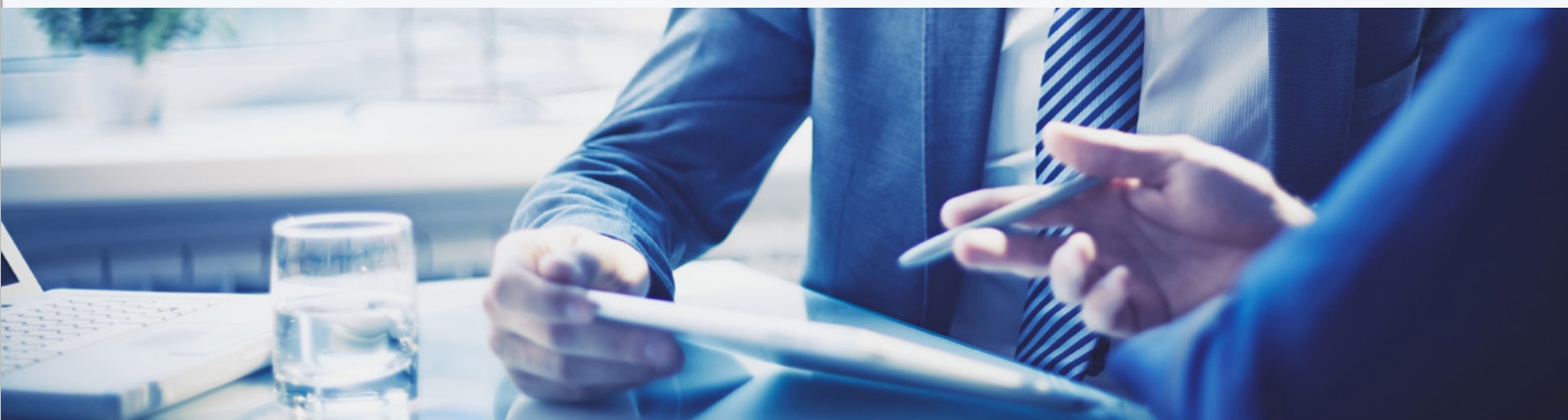# LOCAL LABOUR MARKET
PLANNING REPORT

2018-19

CONTENTS

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 is our annual report on 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. Please consider getting in touch with our Chief Executive Officer, Mario De Divitiis (**mario@niagaraworkforceboard.ca**) if you have any questions or comments about this report.

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, while delivering activities and projects to help support evidence-based planning.

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.

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EXECUTIVE SUMMARY

The 2018 update to Niagara's *Local Labour Market Planning Report* 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. It is important to note that while the current report provides an overview of Niagara as an entire region, current data on each of Niagara's 12 municipalities can be found in our 2018 *Municipal Snapshots*. This year, our annual report is set up to answer five questions about the state of the labour force in Niagara. Specifically, we provide insight for the following areas:

1) Who is living and working in Niagara?
2) What is the type of work in which Niagara's residents are engaged?
3) What type of industries are in Niagara?
4) What are the skills within Niagara's workforce?
5) What are the in-demand jobs in Niagara?

Niagara's labour market is made up of a growing and diverse population. Between 2016 and 2017, Niagara's population grew from an estimate of 454,157 to 458,986. Residents aged 15 to 54 make up 49.1% of the population in Niagara. As of 2017, 211,400 of those residents were either working or looking for work, while approximately 197,600 of those individuals reported employment. About 78% of the workforce reported full-time employment, and about 22% reported part-time employment.

In terms of occupation of employment (i.e., the type of work in which people engage), almost one person in three who live in Niagara reported employment in sales and service occupations. This is more than double the second largest employment group: trades, transport, and equipment operators. In terms of industry of employment (i.e., the sectors in which people are employed), the largest group of individuals were employed in wholesale and retail trade.

Throughout 2017, there was a total of 12,576 employers in the Niagara region. The top three industries by number of employers were retail trade, construction, and health care and social assistance. Although agriculture is a pillar of Niagara's economy, it only offers direct employment to approximately 2% of Niagara's residents. Despite low direct employment, the indirect benefits of agriculture to the region cannot be understated. For example, Niagara Region Economic Development estimates that indirect benefits of agriculture support more than 17,000 jobs and provide more than 1.4 billion dollars in gross domestic product to Niagara.

Understanding Niagara's educational profile is essential for attracting new employers to the region and supporting the growth of those who are already established here. Overall, approximately 58.3% of Niagara's labour force has some level of post-secondary training. When compared to Ontario, Niagara has a clear advantage in college education and trades education within our workforce. Almost half (48.2%) of Niagara's residents possess a college certificate or diploma compared to 37.9% in Ontario.

In terms of in-demand jobs, NWPB is able to examine measurable job demand through online job postings. These tools cannot account for private posts (e.g., a company's private job board) or informal recruiting methods (e.g., word-of-mouth). While this does not capture all employment demand in Niagara, it does serve to give us a baseline understanding of where employers are looking to hire. Throughout 2017, the occupation group with the largest measureable demand was sales and service occupations (43.1% of all job postings).

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 Snapshots, to be released in 2019, will examine the labour market trends of Niagara's individual towns and cities, including both Grimsby and West Lincoln.

SECTION 1: WHO IS LIVING AND WORKING IN NIAGARA?

NIAGARA'S RESIDENTS

Before exploring jobs and industries in Niagara, it is important to take a snapshot of Niagara's population and recent population changes. Such an examination offers important context for understanding who is living in Niagara, who is working in Niagara, and how we might expect Niagara's demographics to change in the near future. Figure 1-1 begins this study, highlighting the Niagara region's most recent population estimate.

FIGURE 1-1: CURRENT AND HISTORICAL POPULATION ESTIMATES FOR THE NIAGARA REGION[1]

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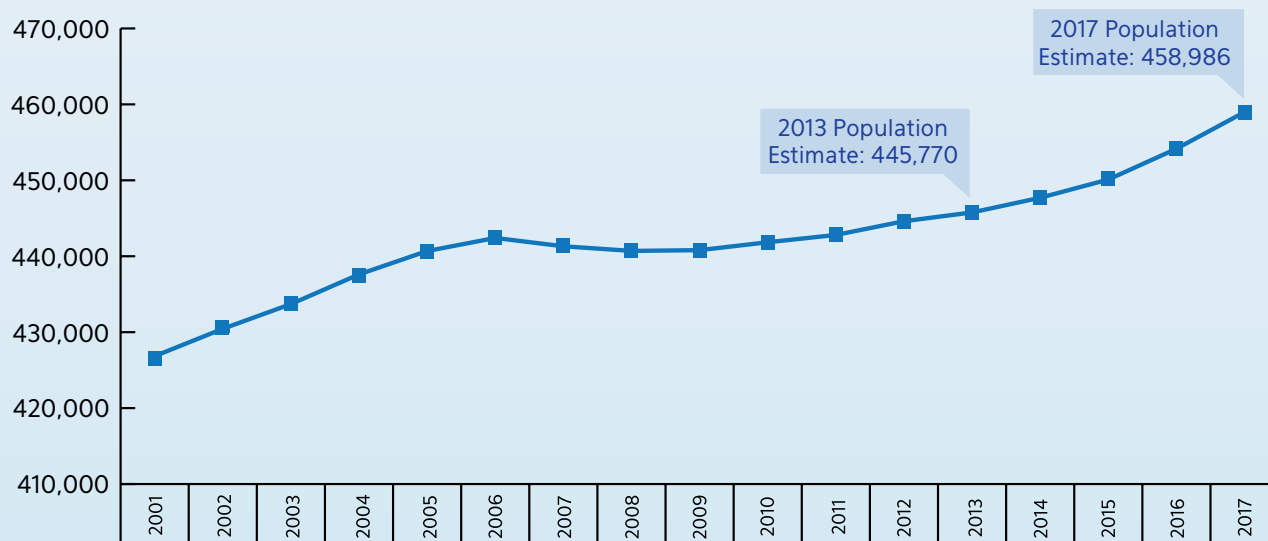
1   Statistics Canada, Table 17-10-0084. Annual demographic estimates by census division. Note data for 2014-2016 are updated postcensal figures and the 2017 population is a preliminary postcensal figure. As such, these figures may be subject to future revision by Statistics Canada.

Preliminary population estimates for 2017 place Niagara's population at 458,986. This is a 1.1% population increase from the revised 2016 population estimate of 454,157. Niagara has been on a positive population growth trajectory since 2009-2010. Figure 1-2 contrasts Niagara's annual rate of population change against Ontario as a means of providing context for the local trends.

FIGURE 1-2: CURRENT AND HISTORICAL ANNUAL POPULATION PERCENTAGE CHANGE FOR THE NIAGARA REGION AND ONTARIO[2]
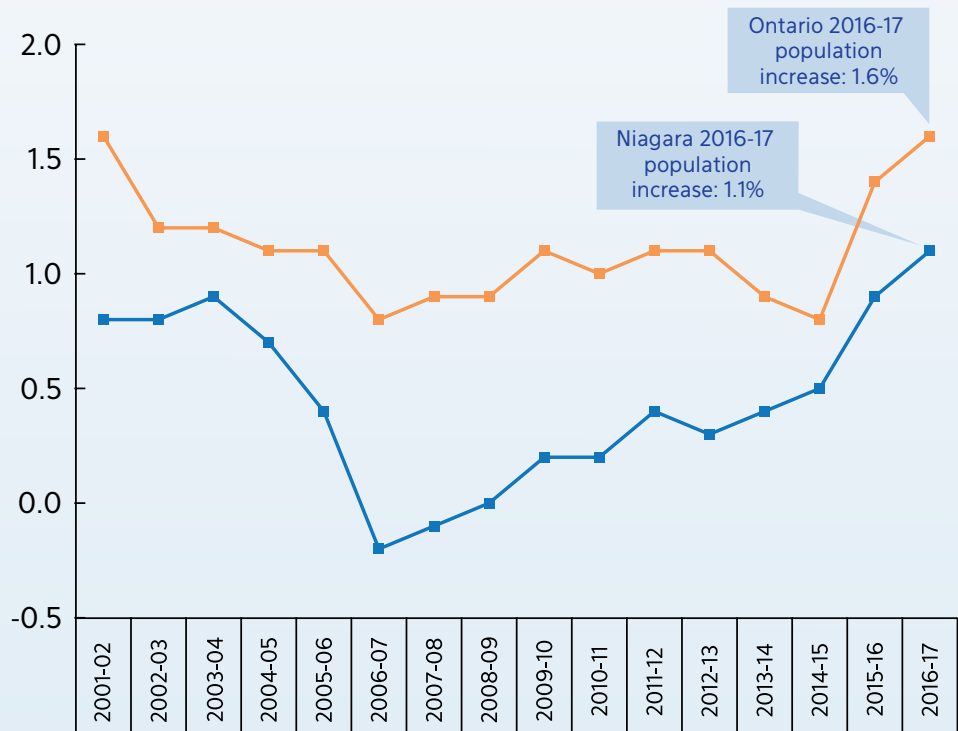
Figure 1-2 reflects the fact that Niagara's rate of population growth does not typically keep pace with the province. Based on 2001-2017 data, Ontario outpaces Niagara in terms of population growth by an average of 0.7% per year. Between 2016 and 2017 Niagara added 4,829 people to its population. If Niagara grew with Ontario's rate of change during the same time period, that population increase would have amounted to approximately 7,053 people[3].

Migration is an important component to measuring population change. Table 1-1 uses data from tax records to present an estimate of Niagara's overall population migration from 2011-2016.

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2   Statistics Canada, Table 17-10-0084. Annual demographic estimates by census division.
3   Ibid and NWPB calculations.

TABLE 1-1: POPULATION MIGRATION IN NIAGARA[4]

Age Group	In-migrants	Out-migrants	Net-migrants
0 – 17	11,525	8,045	3,480
18 – 24	8,795	8,871	-76
25 – 44	21,832	20,100	1,732
45 – 64	15,370	8,841	6,529
65+	7,714	5,091	2,623
Total	**65,236**	**50,948**	**14,288**

Of particular note about these data is that approximately 45.7% of Niagara's net-migration over the 2011-2016 window was among individuals age 45 to 64. Individuals age 25 to 44 represented the smallest net-migration even though more than 40,000 individuals in this age group either left or came to Niagara. This mobility, however, only accounts for 12.1% of overall net-migration.

Data from Table 1-1 also address a popular myth about Niagara. It is commonly held that youth only leave Niagara. These data instead show that the net-exit of youth from Niagara is only 76 individuals: in other words, there are almost as many youth moving into Niagara as there are moving out.

Table 1-2 classifies Niagara's 2017 population into four categories: youth age 0-14, the general working-age population age 15 to 54, the pre-retirement population age 55 to 64, and the retirement-age population aged 65 and over.

TABLE 1-2: NIAGARA'S 2017 POPULATION IN AGE COHORTS[5]

Age	2017 Population	Percentage
0 – 14	65,650	14.3%
15 – 54	225,501	49.1%
55 – 64	69,427	15.1%
65 +	98,408	21.4%

It is important to note that **these data only measure Niagara's population**. Though this report uses employment-focused categories for measuring population, the data in Table 1-2 represents a maximum **potential labour supply** among Niagara residents. The best measure for employment requires a change in data sources and a change in geographical focus.

Specifically, Statistics Canada's Labour Force Survey provides the most reliable and timely data to measure who among Niagara's residents is employed. The challenge with these data is that they are limited to measuring the St. Catharines-Niagara Census Metropolitan Area (i.e. the Niagara CMA). Unlike the Niagara Census Division (i.e. the Niagara region), the Niagara CMA's data do not include data for Grimsby and West Lincoln. These exclusions are due to data collection practices set by Statistics Canada, and are, as such, beyond NWPB's control. For additional insights into labour market conditions in Grimsby and West Lincoln, please consult NWPB's annual *Municipal Snapshot* reports.

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5   Statistics Canada, Table 17-10-0084. Annual demographic estimates by census division.

NIAGARA'S WORKFORCE

Annual data from the Labour Force Survey allow us to present a snapshot of local employment conditions in 2017. Table 1-3 shows us the key labour force performance indicators for people who live in Niagara.

It is important to note that these figures **are not a measure of jobs**. Employment figures are a measure of **people *doing* jobs**, but not the jobs themselves. This is an important distinction to understand as a decrease in employment, such as the one seen in Table 1-4, does not equal a decrease in the number of jobs available within the local labour market.

TABLE 1-3: ST. CATHARINES-NIAGARA CENSUS METROPOLITAN AREA LABOUR MARKET CONDITIONS[6]

Labour Force Indicators in 2017	
People in the labour force	211,400
People employed	197,600
Full-time employment	*153,300*
Part-time employment	*44,400*
Unemployment rate	6.5%
Participation rate	60.7%
Employment rate	56.8%

Within the labour force survey, Statistics Canada defines an individual as having full-time employment if they are working 30 hours or more at a primary place of employment. As seen in Table 1-4, the five year trend for Niagara has seen an overall increase in full-time employment, though the gains seen up to 2016 began to reverse in 2017.

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

TABLE 1-4: EMPLOYMENT IN THE ST. CATHARINES-NIAGARA CENSUS METROPOLITAN AREA[7]

	2013	2014	2015	2016	2017
Full-time employment	147,200	149,100	156,500	157,600	153,300
Part-time employment	46,300	46,400	47,600	45,500	44,400
Total employment	193,500	195,400	204,100	203,100	197,600

The overall decrease in employment among Niagara residents seen in Table 1-4 is mirrored in the local employment and participation rates presented in Table 1-5. There, we can observe falling employment rates (i.e. the percentage of the population over age 15 that is working) and falling participation rates (i.e. the percentage of the population over age 15 that is either working or looking for work). These declines in employment and participation rates are accompanied by a falling unemployment rate. Taken in isolation, a falling unemployment rate might seem like a positive indicator. However, optimal labour market conditions are only met when a falling unemployment rate occurs alongside increases in the employment and participation rates.

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7   Statistics Canada, Table 14-10-0096-01 Labour Force Characteristics by census metropolitan area.

TABLE 1-5: ST. CATHARINES-NIAGARA CENSUS METROPOLITAN AREA EMPLOYMENT INDICATORS[8]

	2013	2014	2015	2016	2017
Unemployment rate	8.6%	7.7%	7.0%	7.1%	6.5%
Participation rate	62.2%	61.8%	63.9%	63.3%	60.7%
Employment rate	56.8%	57.1%	59.5%	58.9%	56.8%

One of the complexities of reporting on a local labour market is that not everybody who lives within a community works within that community. Shifting focus to Niagara region as a whole, data from the 2016 census reports that about 26,215 people who live in Niagara work outside of the region. That means 84.5% of Niagara residents who commute to a usual place of work do so within the Niagara region itself. The remaining 15.3% commute to a place of work in Ontario, and only 0.1% of Niagara residents commute outside of the province. Table 1-6 shows the top five commuting destinations for Niagara residents.

TABLE 1-6: COMMUTING DESTINATIONS FOR PEOPLE LIVING IN THE NIAGARA REGION[9]

Commuting Destination	Number of Commuters
Hamilton	11,845
Halton	6,125
Peel	2,495
Toronto	2,395
Haldimand-Norfolk	1,000
Waterloo	515

Just as people from Niagara commute to other regions for work, so too do people commute into Niagara for employment. Table 1-7 shows the top origin points for the roughly 9,215 people who commute into Niagara.

TABLE 1-7: REGIONS OF ORIGIN FOR INDIVIDUALS COMMUTING INTO NIAGARA[10]

Commuting Origin	Number of Commuters
Hamilton	4,350
Haldimand-Norfolk	1,140
Halton	1,130
Toronto	615
Peel	610
York	225

Section 2 of this report will feature a deeper examination into the type of work people are doing in Niagara.
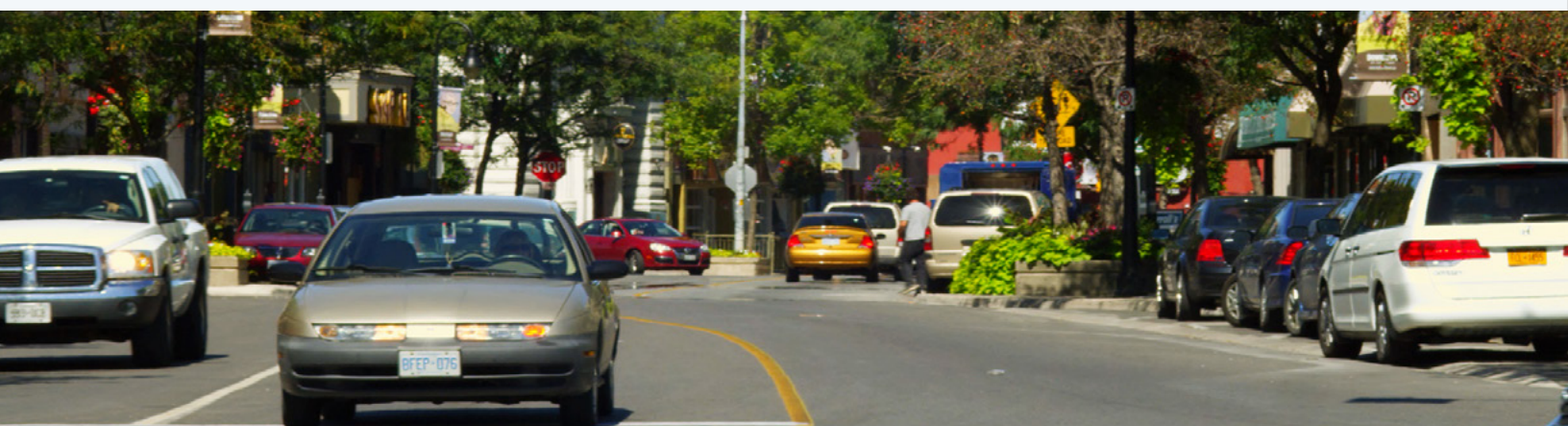
SECTION 2: WHAT TYPE OF WORK ARE PEOPLE DOING IN NIAGARA?

OCCUPATIONAL EMPLOYMENT COUNTS

As noted in Section 1, Statistics Canada's Labour Force Survey reports on employment information for Niagara's residents. Table 2-1 provides insight into the types of occupations in which people report employent. These data are provided at a 1-digit National Occupation Classification (NOC) level, which is the broadest occupation category available.

Although the number of people reporting employment has decreased between 2016 and 2017, certain occupations have shown increases in the number of individuals reporting employment (e.g., manufacturing and utilities, and sales and service occupations).

TABLE 2-1: EMPLOYMENT BY 1-DIGIT NOC, ST. CATHARINES-NIAGARA CMA[11]

Occupation	2013	2014	2015	2016	2017
Sales & service occupations	62,800	61,600	67,600	63,900	64,500
Trades, transport & equipment operators & related occupations	30,800	29,700	29,500	29,900	28,000
Business, finance & administration occupations	24,800	27,400	26,900	26,900	24,300
Occupations in education, law & social, community & government services	19,400	18,300	21,300	21,500	20,000
Health occupations	12,700	14,000	13,600	17,200	16,600
Management occupations	17,500	16,600	17,700	16,900	16,000
Occupations in manufacturing & utilities	9,700	10,700	8,600	8,000	10,700
Natural & applied sciences & related occupations	7,900	8,100	9,200	8,800	8,200
Occupations in art, culture, recreation & sport	3,800	4,800	5,900	5,600	5,600
Natural resources, agriculture & related production occupations	4,100	4,100	3,800	4,500	3,900
Total	**193,500**	**195,400**	**204,100**	**203,100**	**197,600**

Table 2-2 allows us to dig deeper into the types of occupations in which individuals are employed. These data are presented at a 2-digit NOC level and outline the top 10 occupations in which individuals reported being employed throughout 2017.

TABLE 2-2: TOP 10 OCCUPATIONS OF EMPLOYMENT BY 2-DIGIT NOC, ST. CATHARINES-NIAGARA CMA[12]

Occupation	2016	2017	2016-2017 change	2016-2017 % change
Service support & other service occupations	13,300	15,200	1,900	14.3%
Service representatives & other customer & personal services occupations	12,900	13,800	900	7.0%
Sales representatives & salespersons - wholesale & retail trade	11,100	10,300	-800	-7.2%
Service supervisors & specialized service occupations	11,600	9,700	-1,900	-16.4%
Industrial, electrical & construction trades	10,500	9,300	-1,200	-11.4%
Sales support occupations	9,000	9,200	200	2.2%
Administrative & financial supervisors & administrative occupations	7,700	9,000	1,300	16.9%
Professional occupations in education services	6,100	7,200	1,100	18.0%
Middle management occupations in retail & wholesale trade & customer services	7,100	7,100	0	0.0%
Transport & heavy equipment operation & related maintenance occupations	8,900	6,900	-2,000	-22.5%

12   Statistics Canada. Table 14-10-0314-01 Employment by census metropolitan areas and occupation, annual (x 1,000)

NIAGARA'S JOB COUNTS

While the previous section outlined data on the reported employment of Niagara's residents – regardless of their location of employment – here we turn our focus to jobs that existed in Niagara. An important caveat is that the previous data were presented for the St. Catharines-Niagara CMA (which excludes Grimsby and West Lincoln), whereas the current section focuses on the Niagara region (i.e., all 12 municipalities).

This table indicates that the largest occupations - by way of number of jobs - are **sales and service occupations; trades, transport and equipment operators, and related occupations**; and **business, finance, and administration occupations.** Together, these three occupations make up 59.2% of all jobs.

In terms of recent change, health occupations experienced the largest percentage growth between 2016 and 2017 with an increase of 8.6%. In terms of raw growth, sales and service occupations saw the largest growth with an increase of 2,181 jobs between 2016 and 2017.

TABLE 2-3: NUMBER OF JOBS, 1-DIGIT NOC, NIAGARA[13]

Occupation	2013	2014	2015	2016	2017
Sales & service occupations	55,902	56,547	56,589	56,725	58,906
Trades, transport & equipment operators & related occupations	24,243	25,048	24,416	25,638	26,622
Business, finance & administration occupations	23,643	24,787	26,803	26,930	26,279
Occupations in education, law & social, community & government services	18,001	17,803	19,058	20,409	19,854
Health occupations	11,358	11,103	11,823	12,966	14,077
Management occupations	11,745	11,263	11,184	10,680	11,068
Occupations in manufacturing & utilities	9,798	9,972	11,046	10,618	10,604
Natural & applied sciences & related occupations	7,312	7,770	8,282	8,580	9,150
Natural resources, agriculture & related production occupations	3,440	3,418	3,531	4,239	4,388
Occupations in art, culture, recreation & sport	3,297	2,959	3,430	4,063	4,029
Unclassified	2,804	2,388	2,742	3,300	3,768
Total	**171,541**	**173,058**	**178,903**	**184,148**	**188,744**

Table 2-4 outlines the number of jobs and job change between 2016 and 2017 by 2-digit NOC. Since these data provide more in-depth insight into the occupations with the largest number of jobs, the patterns still reflect employment trends seen in Table 2-1. This more specific focus allow us to see the approximately 14,000 jobs in service support and other service occupations as about 7.4% of all jobs in Niagara.

TABLE 2-4: TOP 10 JOBS BY NUMBER OF JOBS, 2-DIGIT NOC, NIAGARA[14]

Occupation	2016	2017	2016-2017 change	2016-2017 % change
Service support & other service occupations	12,845	14,038	1,193	9.3%
Service representatives & other customer & personal services occupations	11,917	12,140	223	1.9%
Service supervisors & specialized service occupations	9,225	9,621	396	4.3%
Sales representatives & salespersons - wholesale & retail trade	9,547	9,497	-50	-0.5%
Administrative & financial supervisors & administrative occupations	8,811	9,068	257	2.9%
Industrial, electrical & construction trades	8,619	8,541	-78	-0.9%
Sales support occupations	8,170	8,209	39	0.5%
Professional occupations in education services	8,401	7,651	-750	-8.9%
Office support occupations	7,575	6,986	-589	-7.8%
Transport & heavy equipment operation & related maintenance occupations	6,770	6,548	-222	-3.3%

MEASURING NIAGARA'S LABOUR SUPPLY

Case data from Niagara's Employment Ontario Employment Services providers allow us to create a picture of the available labour pool in Niagara. The people seeking employment support through Employment Ontario are ready to work and reflect a diversity of skills and experiences. The case count for those assisted by Employment Ontario's Employment Services (ES) providers was 6,970 throughout the 2017-2018 fiscal year (i.e., April 2017 – March 2018). The majority of assisted clients were between the ages of 25 and 44 years old, as seen in Table 2-5, and had a broad range of previous employment experiences, as is demonstrated in Tables 2-6 and 2-7.

TABLE 2-5: AGE COHORTS FOR NIAGARA ES CLIENTS, 2017-2018[15]

Age	Number of Employment Services Clients	Percentage of Employment Services Clients
15-24	1,658	23.8%
25-44	2,894	41.5%
45-64	2,299	33.0%
65 & older	118	1.7%

Industries in which clients had previously worked range from accommodation and food service to construction. Most clients were employed in service support & other services occupations, service representatives & other customer and personal services occupations, and trades helpers, construction labourers & related occupations.

TABLE 2-6: TOP 10 INDUSTRIES AT TIME OF LAYOFF FOR NIAGARA ES CLIENTS, 2017-2018[16]

Industry at layoff	Clients
Accommodation & food services	727
Construction	399
Administrative & support & waste management & remediation services	370
Retail trade	333
Manufacturing	328
Other services (except public administration)	243
Health care & social assistance	222
Manufacturing	157
Retail trade	155
Arts, entertainment, & recreation	135

TABLE 2-7: TOP 10 OCCUPATIONS AT TIME OF LAYOFF FOR NIAGARA ES CLIENTS, 2017-2018[17]

Occupation at layoff	Clients
Service support & other service occupations	518
Service representatives & other customer & personal services occupations	283
Trades helpers, construction labourers & related occupations	283
Industrial, electrical & construction trades	235
Labourers in processing, manufacturing and utilities	226
Sales representatives and salespersons – wholesale & retail trade	224
Sales support occupations	220
Service supervisors & technical service occupations	212
Transport & heavy equipment operation & related maintenance occupations	158
Administrative & financial supervisors & administrative occupations	126

16   EOIS CAMS
17   Ibid

The largest group of Employment Services' clients (46.7%) reported being out of employment or training for less than three months; 73.4% reported being out of employment for 12 months or less. Figure 2-1 compares the educational outcomes of ES clients in Niagara and Ontario. Compared to Niagara, a higher proportion of ES clients in Ontario hold university-level training. Slightly more than one quarter (26.1%) of Niagara's ES clients hold a college-level diploma, a slightly higher proportion than Ontario as a whole.

FIGURE 2-1: EDUCATIONAL ATTAINMENT FOR ES CLIENTS IN ONTARIO AND NIAGARA, 2017-2018[18]
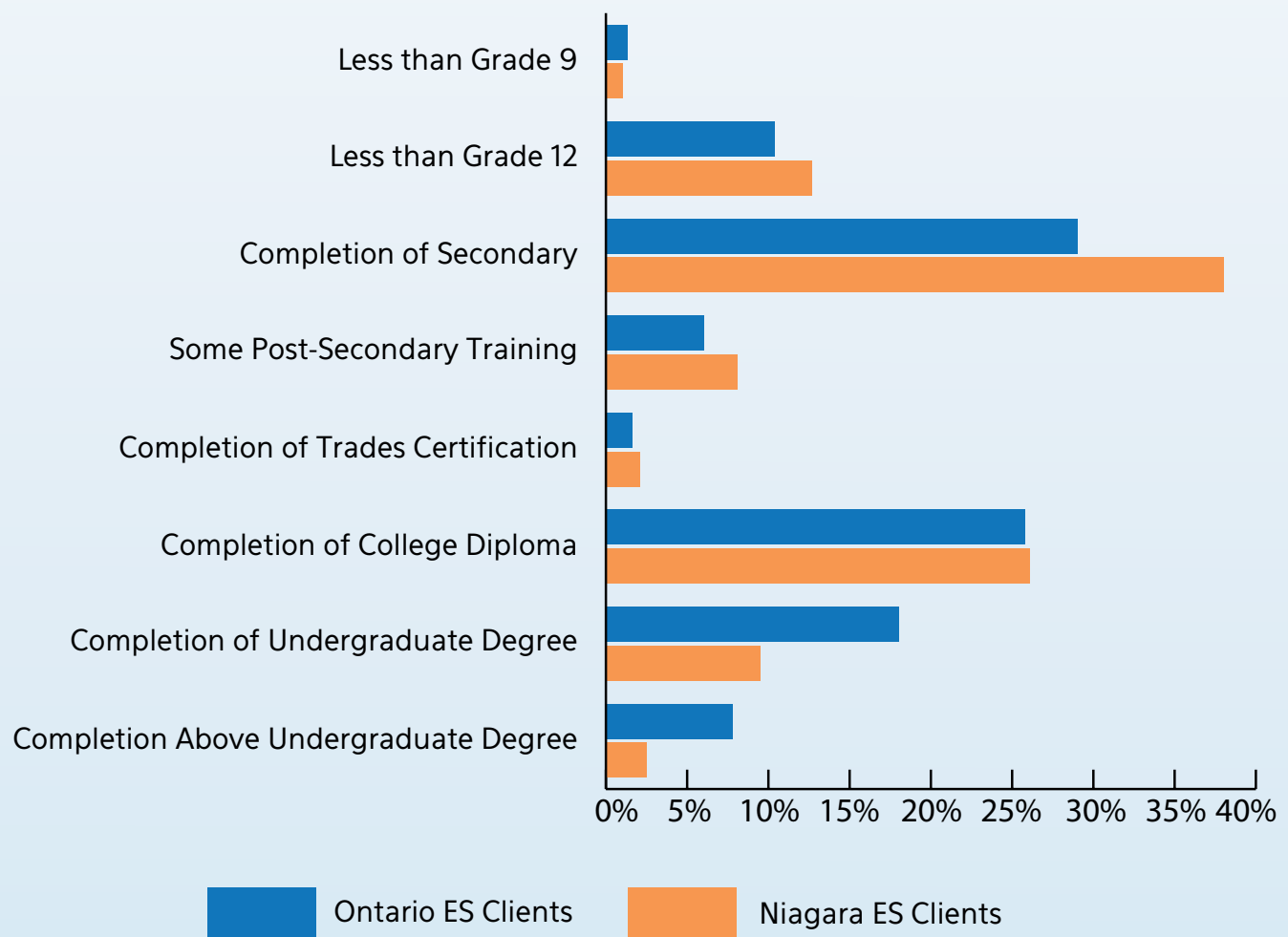
Ontario ES Clients | Niagara ES Clients

SECTION 3: WHAT INDUSTRIES ARE IN NIAGARA?

To further understand what industries are prominent in Niagara, NWPB analyzes the Canadian Business Counts database. These figures provide insight on the number of employers in each industry, the size of businesses within that industry, and levels of self-employment or zero-employee firms. These data help us better understand what industries are most prominent in Niagara and where jobs can be found in our community.

NIAGARA'S EMPLOYER COUNTS

In 2017, there were approximately 12,576 employers in Niagara. Of these, 11,890 were classified within an industry in the North American Industrial Classification System (NAICS). The top five industries in Niagara, ranked by number of businesses with employees, are displayed in Table 3-1.

TABLE 3-1: TOP FIVE INDUSTRIES BY NUMBER OF BUSINESSES WITH EMPLOYEES, NIAGARA, 2017[19]

Industry	Total, with employees
Retail trade	1,626
Construction	1,594
Health care and social assistance	1,276
Other services (except public administration)	1,167
Accommodation and food services	1,098

19   Canadian Business Counts – December, 2017, Establishment counts

Table 3-2 outlines the size of employers for these top five industries. Here we see that most employers in retail trade and accommodation and food service are small employers (i.e., they employ between 5 and 99 individuals). Construction, health care and social assistance, and other services (except public administration) see the largest amount of micro-businesses (i.e., they employ fewer than five people).

TABLE 3-2: EMPLOYER SIZE BY INDUSTRY, NIAGARA, 2017[20]

Industry	Micro (1-4 employees)	Small (5-99 employees)	Medium (100-499 employees)	Large (500+ employees)
Retail trade	578	1,003	43	2
Construction	901	683	10	0
Health care & social assistance	678	568	26	4
Other services (except public administration)	732	433	2	0
Accommodation & food services	242	812	40	4

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20   Canadian Business Counts – December, 2017. Note: throughout this section "businesses" denotes all employers, regardless of if they are businesses, charities, or not-for-profit organizations"

MEASURING SMALL-TO-MEDIUM ENTERPRISES

When analyzing the business and employee counts for Niagara region, it is apparent that there is a strong force of small to medium enterprises (SMEs) that operate within the region. A vast majority of the employers in Niagara are defined as SMEs. An SME has between one and 99 employees. Only 2.1% of employers in Niagara employ over 100 people. Of the 12,576 businesses that operate with employees, only 25 businesses employ over 500 people. This speaks to the importance of understanding the needs of employers that operate SMEs.

Table 3-3 lists the top five industries in 2017 by number of SMEs across the region. It also provides the amount of change in the number of businesses observed since the previous year. In Niagara, SMEs appear to be most prevalent in four industries: specialty trade contractors; professional, scientific and technical services; food services and drinking places; and ambulatory health care services.

TABLE 3-3: TOP 5 SME INDUSTRIES IN NIAGARA AND NUMBER OF BUSINESSES WITH EMPLOYEES, 2017[21]

Industry	2016 Total, with employees	2017 Total, with employees	2016-2017 Absolute Change	2016-2017 % Change
Specialty trade contractors	1,067	1,120	53	5.0%
Professional, scientific and technical services	945	977	32	3.4%
Food services and drinking places	972	955	-17	-1.7%
Ambulatory health care services	951	924	-27	-2.8%
Administrative and support services	512	524	12	2.3%

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21   Canadian Business Counts

Table 3-4 outlines the number of jobs in these top SME industries throughout Niagara in 2017. Here we note an interesting finding: although food services and drinking places and ambulatory health care services experienced declines in the number of active businesses between 2016 and 2017, there was an increase in the total number of jobs. This could mean that although the number of establishments declined, there was still notable demand within the industry.

TABLE 3-4: NUMBER OF JOBS IN THE TOP 5 SME INDUSTRIES IN NIAGARA, 2017[22]

Industry	2016 Jobs	2017 Jobs	2016-17 Absolute Change	2016-17 % Change
Specialty trade contractors	7,198	7,468	270	3.8%
Professional, scientific and technical services	5,001	5,186	185	3.7%
Food services and drinking places	16,508	17,115	607	3.7%
Ambulatory health care services	6,394	6,541	147	2.3%
Administrative and support services	8,700	8,893	194	2.2%

MICRO-BUSINESSES IN NIAGARA

Micro-businesses are the smallest subset of SMEs, operating with only 1-4 employees. When categorizing SMEs in this way, approximately half (50.3%) of employers in Niagara are defined as micro-businesses. Table 3-5 shows the top five industries by number of micro-businesses.[23]

TABLE 3-5: TOP 5 INDUSTRIES BY NUMBER OF MICRO-BUSINESSES IN NIAGARA, 2017

Industry	Number of Micro-businesses
Construction	901
Other services (except public administration)	732
Professional, scientific and technical services	706
Health care and social assistance	678
Retail trade	578

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23   Canadian Business Counts, December 2017.

INDUSTRY EMPLOYMENT COUNTS

Since we have discussed the employer landscape in Niagara, it is important to also examine in what industries Niagara's residents report employment. Figure 3-1 outlines the proportion of individuals reporting employment in goods-producing vs. services-producing sectors. We can see that the proportion of the goods-producing sector has seen a decrease over time.

FIGURE 3-1: EMPLOYMENT IN GOODS-PRODUCING VERSUS SERVICES-PRODUCING SECTORS IN NIAGARA[24]

2007
Goods-producing: **23.8%**
Services-producing: **76.2%**

2012
Goods-producing: **20.3%**
Services-producing: **79.6%**

2016
Goods-producing: **20.3%**
Services-producing: **79.7%**

2017
Goods-producing: **20.0%**
Services-producing: **80.0%**

Goods-producing sector   Services-producing sector
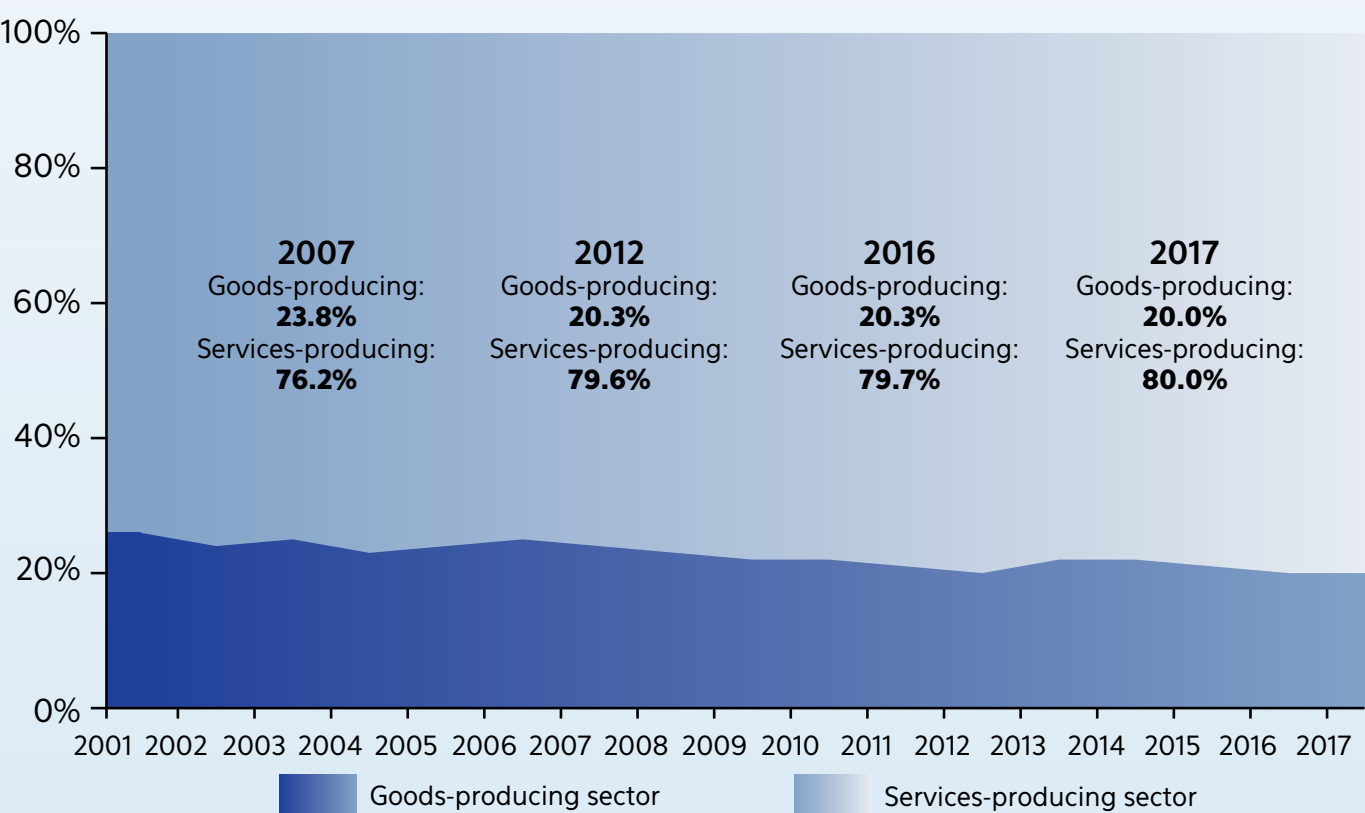
24   Statistics Canada Table: 14-10-0098-01 (formerly CANSIM 282-0131), St. Catharines-Niagara CMA

We can break these sectors down into further detail by examining individuals'
industry of employment at a 2-digit NAICS level. Table 3-6 provides data from
the Labour Force Survey, which indicate reported industry of employment for
residents living in the St. Catharines-Niagara CMA. Here we see that the largest
industry of employment is in wholesale and retail trade.

TABLE 3-6: INDUSTRY OF EMPLOYMENT, ST. CATHARINES-NIAGARA CMA[25]

Industry	2013	2014	2015	2016	2017
Agriculture	4,100	4,000	2,900	3,700	3,000
Forestry, fishing, mining, quarrying, oil & gas	x	x	1,700	x	x
Utilities	1,500	1,900	1,500	x	1,600
Construction	14,300	15,300	18,000	17,100	13,000
Manufacturing	21,800	20,800	18,300	19,100	21,600
Wholesale & retail trade	31,400	31,100	34,800	34,200	31,900
Transportation & warehousing	8,000	8,100	7,400	8,700	8,000
Finance, insurance, real estate, rental & leasing	7,400	10,100	7,700	8,600	9,300
Professional, scientific & technical services	7,400	9,100	9,200	8,000	9,600
Business, building & other support services	11,000	11,100	14,800	10,700	10,000
Educational services	15,300	13,700	14,600	12,200	13,400
Health care & social assistance	21,500	23,300	23,900	28,000	24,500
Information, culture & recreation	8,700	8,400	9,300	10,900	9,300
Accommodation & food services	21,200	23,000	24,800	24,600	24,500
Other services (except public administration)	10,100	6,800	7,900	7,100	9,700
Public administration	9,200	8,400	7,500	8,900	7,800
Total	**193,500**	**195,400**	**204,100**	**203,100**	**197,600**

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25   Statistics Canada Table: 14-10-0098-01 (formerly CANSIM 282-0131),
      St. Catharines-Niagara CMA. Cells containing 'x' are suppressed data from Statistics Canada.
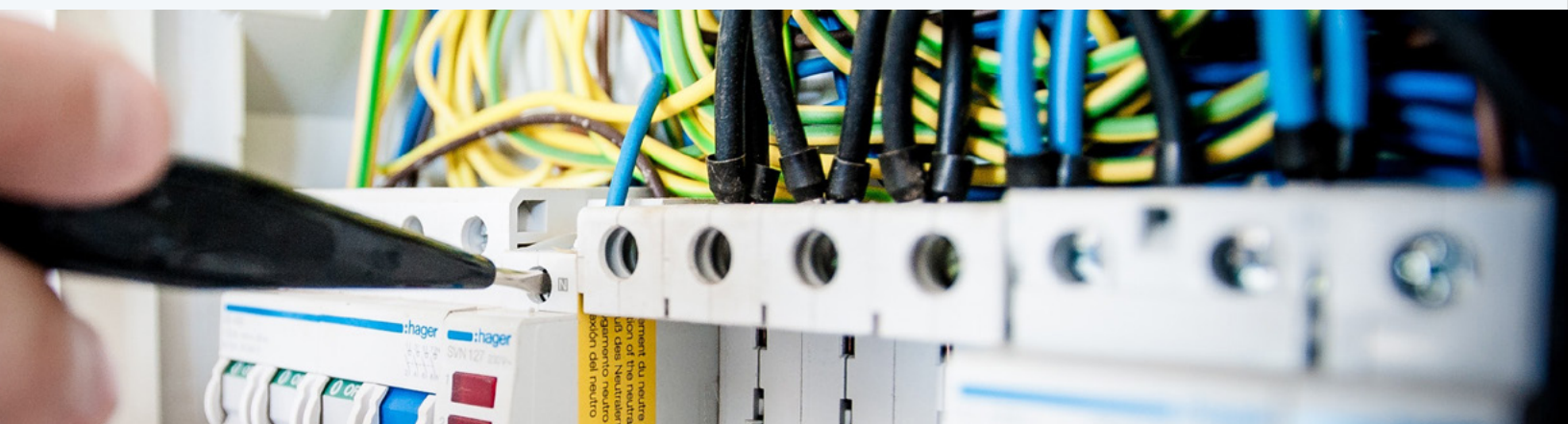
SECTION 4: WHAT SKILLS ARE IN NIAGARA'S LABOUR FORCE?

Understanding the training and educational profile of a local workforce is essential for supporting the growth of existing employers and attracting new ones to the region. The 2016 Census is NWPB's best source for regionally focused training data[26].

Table 4-1 shows the general breakdown of educational attainment in Niagara's active labour force as of the 2016 Census. It shows that more than 58% of the local labour force hold some level of post-secondary training.

TABLE 4-1: NIAGARA REGION LABOUR FORCE EDUCATIONAL ATTAINMENT[27]

Level of Educational Attainment	2016 Workforce	Percentage
No certificate, diploma or degree	22,965	10.1%
Secondary (high) school diploma or equivalency certificate	71,520	31.6%
Postsecondary certificate, diploma or degree	132,110	58.3%

26 Note: these data are focused on Niagara at the regional, or census division, level. As such, they are inclusive of Grimsby and West Lincoln.
27 Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016365

Table 4-2 contrasts the local trends against those of Ontario. There we can see that Ontario shows a slightly higher proportion of individuals in the labour force (i.e., those individuals either working or looking for work) with post-secondary training than in Niagara.

TABLE 4-2: NIAGARA REGION AND ONTARIO LABOUR FORCE EDUCATIONAL ATTAINMENT[28]

Level of Educational Attainment	Niagara Percentage	Ontario Percentage
No certificate, diploma or degree	10.1%	9.7%
Secondary (high) school diploma or equivalency certificate	31.6%	26.6%
Postsecondary certificate, diploma or degree	58.3%	63.7%

28   Statistics Canada, 2016 Census of Population, Statistics Canada
       Catalogue no. 98-400-X2016365

Given the considerable number of people, both in Niagara and Ontario, who hold a post-secondary qualification, it is important to offer a deeper understanding of specific certificates/degrees that are held by the workforce. Table 4-3 begins this process through an examination of the specific levels of educational attainment within the segment of Niagara's labour force that holds a completed post-secondary diploma or degree[29].

TABLE 4-3: NIAGARA CENSUS DIVISION POST-SECONDARY EDUCATIONAL ATTAINMENT[30]

Level of Post-Secondary Training	2016 Workforce	Percentage
College certificate or diploma	63,675	48.2%
Bachelor's degree	32,775	24.8%
Certificate of Apprenticeship or Certificate of Qualification	9,525	7.2%
Master's degree	8,475	6.4%
Trades certificate or diploma	8,190	6.2%
University certificate or diploma below bachelor level	3,865	2.9%
University certificate or diploma above bachelor level	3,045	2.3%
Degree in medicine, dentistry, veterinary medicine or optometry	1,345	1.0%
Earned doctorate	1,205	0.9%

While many elements of Table 4-3 are self-explanatory, two elements might offer some confusion to readers: university certificates/diplomas below bachelor level and university certificates/diplomas above bachelor level. These designations relate to non-degree programs completed through a university. They are often related to professional fields (e.g. accounting, banking, insurance, public administration).

Those certificates/diplomas that do not require a university degree for admission are categorized at a "below bachelor level." Conversely, those certificates/diplomas that do require a bachelor's degree as a prerequisite are measured at an

29   Note: these data indicate the highest level of educational attainment.
30   Statistics Canada, 2016 Census of Population, Statistics Canada.
       Catalogue no. 98-400-X2016365.

"above bachelor level." In other words, any person who has a certificate/diploma above a bachelor level also has a bachelor's degree.[31]

Table 4-4 places Niagara's post-secondary attainment in context against Ontario's data. There we can see that while Niagara offers an advantage in a labour force with college-level training, the province's figures reflect a stronger preference for bachelor's degrees.

TABLE 4-4: NIAGARA CENSUS DIVISION AND ONTARIO POST-SECONDARY EDUCATIONAL ATTAINMENT[32]

Level of Post-Secondary Training	Niagara Percentage	Ontario Percentage
College certificate or diploma	48.2%	37.9%
Bachelor's degree	24.8%	33.0%
Certificate of Apprenticeship or Certificate of Qualification	7.2%	4.8%
Master's degree	6.4%	10.2%
Trades certificate or diploma	6.2%	4.4%
University certificate or diploma below bachelor level	2.9%	3.6%
University certificate or diploma above bachelor level	2.3%	3.1%
Degree in medicine, dentistry, veterinary medicine or optometry	1.0%	1.3%
Earned doctorate	0.9%	1.6%

Though it is important to have an understanding of the educational levels of Niagara's resident labour force, it is equally important to offer insights on the types of skills and expertise those degrees and diplomas introduce into the labour force. Once again, NWPB is able to use census data that measure the major field of study among the post-secondary trained labour force. These data are inclusive of all people within the labour force who completed post-secondary training, regardless of whether it was at a trades, college, or university level.

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31   Statistics Canada, Dictonary, Census of Population 2016, Highest certificate, diploma, or degree
32   Statistics Canada, 2016 Census of Population, Statistics Canada.
         Catalogue no. 98-400-X2016365.

Table 4-5 presents some of the most frequently occurring major fields of study within Niagara's labour force and demonstrates a sample of the skills available to current and future employers in the Niagara region. While these data do not speak to questions of skill shortages on their own, they are essential in forming the first plank of any evidence-based discussion on skills shortages.

TABLE 4-5: COMMON FIELDS OF STUDY WITHIN NIAGARA'S LABOUR FORCE[33]

Major field of study	In the labour force	Participation rate	Employment rate
Business, management, marketing & related support services	22,660	71.4%	67.8%
Health professions & related programs	19,445	69.5%	66.9%
Education	8,100	60.6%	58.6%
Engineering technologies & engineering-related fields	6,795	71.0%	66.7%
Mechanic & repair technologies/technicians	6,260	65.0%	62.0%
Personal & culinary services	5,925	70.0%	66.4%
Construction trades	5,330	65.0%	60.5%
Social sciences	5,120	74.1%	69.7%
Family & consumer sciences/ human sciences	4,150	77.5%	74.2%
Precision production	4,130	58.9%	54.4%
Visual & performing arts	4,090	75.5%	69.4%
Security and protective services	4,025	84.3%	80.7%
Engineering	3,350	70.2%	64.8%
Computer & information sciences & support services	3,035	76.6%	71.8%
Parks, recreation, leisure & fitness studies	2,745	83.2%	80.2%
Public administration & social service professions	2,685	77.3%	72.5%
Psychology	2,670	71.5%	68.1%

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33   Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016365.

SECTION 5: WHAT IS IN DEMAND IN NIAGARA?

The previous sections outline a variety of indicators about Niagara's population, the occupations and industries in which Niagara's residents are employed, and the available skillsets of Niagara's workforce.

To supplement this information, the current section focuses on employer-identified demand for labour and skills within the labour force. NWPB uses job aggregation tools that provide information on measurable in-demand jobs and skills from Niagara's employers[34].

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34   Note: this information is only available for job posts that are public facing and online; these tools cannot account for private posts (e.g., a company's private job board) or informal means of finding available jobs (e.g., word-of-mouth).

LOCATION OF JOB DEMAND

Table 5-1 outlines where we see measurable job demand based on 11,322 public-facing job postings reported in 2017. The majority of postings were concentrated in Niagara Falls, St. Catharines, and Welland; together these three locations accounted for 72.0% of measureable job demand.

TABLE 5-1: JOB POSTINGS BY LOCATION, NIAGARA 2017[35]

Location	Job Postings	Percent
Niagara Falls	3,739	33.0%
St. Catharines	2,770	24.5%
Welland	1,646	14.5%
Niagara-on-the-Lake	927	8.2%
Grimsby	538	4.8%
Thorold	500	4.4%
Fort Erie	420	3.7%
Lincoln	290	2.6%
Port Colborne	268	2.4%
Pelham	132	1.2%
Wainfleet	30	0.3%
West Lincoln	23	0.2%
Unavailable	39	0.3%
Total	**11,322**	**100.0%**

OCCUPATIONS IN DEMAND

In previous sections of this report we outlined the largest industries and occupations in which people report employment. Previously, we saw that retail trade houses the most employers in Niagara, and it is the largest sector in which Niagara's residents report being employed. When we look at job demand, Table 5-2 shows that the top industry in terms of job demand also is retail trade. These data are presented at a 2-digit North American Industry Classification System (NAICS) level.

TABLE 5-2: TOP 10 JOB POSTINGS BY 2-DIGIT NAICS, NIAGARA 2017[36]

Industry	Job Postings	Percent
Retail trade	2,023	17.9%
Accommodation & food services	1,173	10.4%
Finance & insurance	757	6.7%
Manufacturing	474	4.2%
Public administration	465	4.1%
Health care & social assistance	450	4.0%
Administrative & support & waste management & remediation services	431	3.8%
Wholesale trade	417	3.7%
Professional, scientific, & technical services	304	2.7%
Real estate & rental & leasing	289	2.6%

36   Gartner TalentNeuron; Niagara County; January 1 – December 31, 2017; excluding Kijiji; new jobs.

Table 5-3 outlines in-demand job posts by occupation at a 1-digit National Occupation Classification (NOC) level. Almost half of measureable job demand was for occupations in sales and services. This is consistent with data from Section 2, where the largest occupation in which individuals reported employment was sales and services (i.e., out of all employment, 32.6% was in sales and service occupations). Together, these similarities all point to sales and service occupations being prevalent in Niagara's employment landscape.

TABLE 5-3: JOB POSTINGS BY 1-DIGIT NOC, NIAGARA 2017[37]

Occupation	Job Postings	Percent
Sales & service occupations	4,878	43.1%
Business, finance & administration occupations	1,673	14.8%
Trades, transport & equipment operators & related occupations	1,160	10.2%
Management occupations	807	7.1%
Natural & applied sciences & related occupations	696	6.1%
Occupations in education, law & social, community & government services	671	5.9%
Health occupations	508	4.5%
Unclassified occupation	352	3.1%
Occupations in manufacturing & utilities	246	2.2%
Natural resources, agriculture & related production occupations	205	1.8%
Occupations in art, culture, recreation & sport	126	1.1%
Total	**11,322**	**100.0%**

Although having a general sense of occupations that are in-demand is important, digging deeper allows one to see more specific jobs and occupations that are in high demand. Table 5-4 offers a more specific focus on the data reported in the previous table. Here we see that job postings for retail sales persons, retail sales supervisors, and auditors, accountants, and investment professionals represented the most frequently in-demand jobs.

TABLE 5-4: JOB POSTINGS ABOVE 2% OF DEMAND, 3-DIGIT NOC, NIAGARA 2017[38]

Occupation	Job Postings	Percent
Retail salespersons	701	6.2%
Retail sales supervisors	618	5.5%
Auditors, accountants, & investment professionals	469	4.1%
Service supervisors	419	3.7%
Customer & information services representatives	417	3.7%
Chefs & cooks	360	3.2%
Cleaners	360	3.2%
Sales & account representatives - wholesale trade (non-technical)	355	3.1%
Food counter attendants, kitchen helpers & related support occupations	339	3.0%
Occupations in food & beverage service	320	2.8%
Motor vehicle & transit drivers	310	2.7%
Supply chain logistics, tracking & scheduling co-ordination occupations	305	2.7%
Managers in financial & business services	298	2.6%
Paraprofessional occupations in legal, social, community & education services	268	2.4%
Cashiers	239	2.1%
Human resources & business service professionals	237	2.1%

EMPLOYER-IDENTIFIED SKILLS IN DEMAND

Table 5-5 outlines the top in-demand hard skills (i.e. technical skills), soft skills (i. e. interpersonal skills) and certifications. It is important to note here that a job posting can indicate or require more than one skill and certification. For example, an employer could indicate that they would like an applicant who is bilingual, knows Microsoft Office, and is a team player.

TABLE 5-5: TOP IN-DEMAND SKILLS, NIAGARA 2017[39]

| Skill Type	Skill Name	Frequency	Percent
Hard Skills	Microsoft Office	841	7.4%
	Bilingual	238	2.1%
	Bilingual french	229	2.0%
	Food preparation	202	1.8%
	Quality assurance	159	1.4%
Soft Skills	Oral and written communication	2,382	21.0%
	Detail oriented	2,178	19.2%
	Team player	2,012	17.8%
	Problem solving	1,161	10.3%
	Integrity	1,096	9.7%
Certifications	Driver's license	1,600	14.1%
	First aid certification	580	5.1%
	Certification in cardiopulmonary resuscitation	177	1.6%
	Food safety programs	159	1.4%
	Continuing education	152	1.3%

A second way we examine employers' perspectives on in-demand skills is through our Employer One Survey. Employer One is an annual survey that offers a variety of insights on hiring and recruitment challenges.

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39   Gartner TalentNeuron; Niagara County; January 1 – December 31, 2017; excluding Kijiji; new jobs.

Data from our January 2018 delivery of the Employer One survey reported that 53.4% of respondents reported hiring for hard-to-fill positions. These were positions where the search for a candidate took longer than expected. To help understand this phenomenon, we asked employers to identify their top reasons why a position was hard-to-fill. These reasons are identified in Figure 5-1.

FIGURE 5-1: HARD-TO-FILL POSITIONS
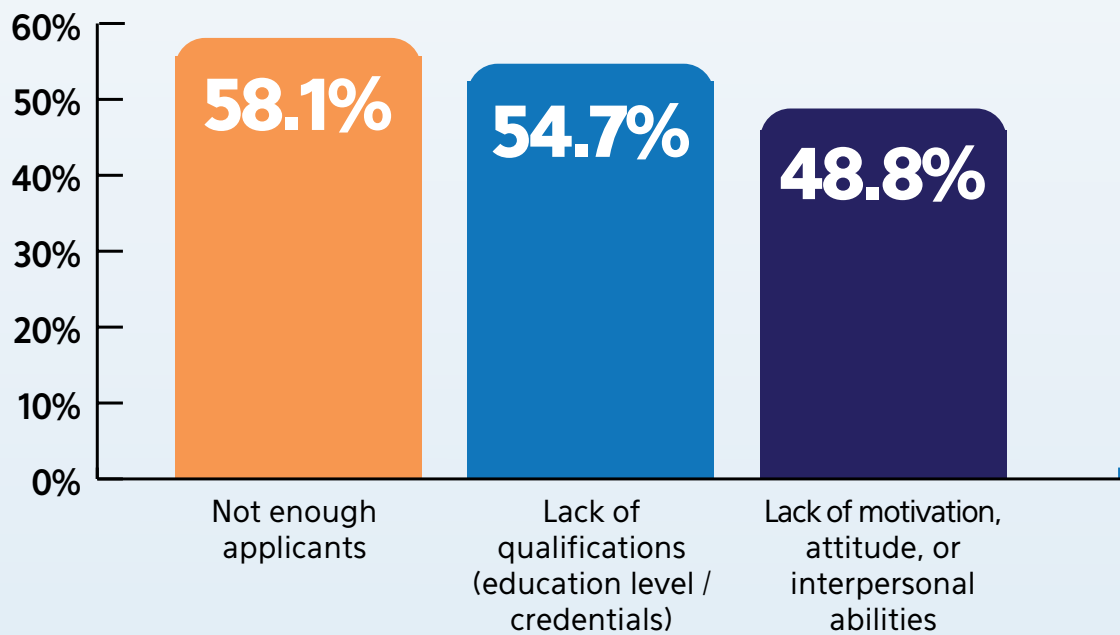
Employers also identified the top-three competencies they valued among their workforce.

1) A strong work ethic
2) Customer service skills
3) Teamwork

Though employers valued technical skills, data from Employer One shows they placed a priority on a workforce that can demonstrate their "soft" skills.

SECTION 6: EMPLOYER CONSULTATION

To obtain additional up-to-date insight on employers' needs, we conducted consultations which assessed four areas. Employers were asked to respond to the following questions:

1) As an employer, what labour market data/indicators are most important to you?
2) What do you see as the greatest asset of Niagara's workforce (i.e., its biggest strength)?
3) Think about the current employment landscape in Niagara. How do you see this changing over the next 10 years?
4) Every year we create a report highlighting key indicators related to employment in Niagara. Generally these fall along the lines of local employment, unemployment, job demand, and occupations and industries in Niagara. What other topics (e.g., housing, transportation) do you think it would be important to examine for Niagara?

The following pages outline common themes for each consultation question.

QUESTION 1: AS AN EMPLOYER, WHAT LABOUR MARKET DATA/INDICATORS ARE MOST IMPORTANT TO YOU?

Of the 58 surveyed employers, 19 employers either did not respond to the question or indicated that there was nothing specific that was important to them. For the remaining 39 employers, each response was categorized into a theme or general concept. Table 6-1 outlines the number of responses that fit each theme.

We see that the most common indicators employers wanted to know more about were about the type of skills that exist in the labour force, general information about the labour force (e.g., employment and unemployment, where workers are employed/unemployed, employment durations, etc.), and wage and benefits data.

Note: Employers were able to select more than one response.

TABLE 6-1: EMPLOYER THEMES FOR CONSULTATION QUESTION 1

Theme	Number of Responses	Percentage of All Responses
Skills	16	25.4%
Labour	13	20.6%
Wages	10	15.9%
Education	9	14.3%
Industry	6	9.5%
Training	3	4.8%
Hiring	3	4.8%
Other	2	3.2%
Government Resources	1	1.6%
Total	**63**	**100.0%**

QUESTION 2: WHAT DO YOU SEE AS THE GREATEST ASSET OF NIAGARA'S WORKFORCE?

Our second consultation question asked how employers view Niagara's workforce. Rather than asking pointed questions about the quality of workers, employers had the opportunity to talk about Niagara's biggest workforce strength. 20 employers either did not respond or did not have any particular strength to mention.

The remaining 38 employers' responses were categorized into themes (see Table 6-2). The most common response for Niagara's greatest asset was that of the skilled people in Niagara's workforce. Employers indicated that Niagara's location contributes to a strong quality of life, affordability for businesses and employees, and assets related to our proximity to the border and Toronto.

Some employers did not indicate assets and instead offered areas of improvement. Commonly cited topics were the limited availability of skilled labour and difficulties attracting people to Niagara. These responses, though, were in the minority of employers' dialogue for this question throughout the consultation process.

TABLE 6-2: EMPLOYER THEMES FOR CONSULTATION QUESTION 2

| Theme	Number of Responses	Percentage of All Responses
People skill	13	31.7%
Location	11	26.8%
People value	10	24.4%
Negative	8	19.5%
Industry	5	12.2%
Education	4	9.8%
Wage	1	2.4%
Transportation	1	2.4%
Technology	1	2.4%
Total	**41**	**100.0%**

QUESTION 3: THINK ABOUT THE CURRENT EMPLOYMENT LANDSCAPE IN NIAGARA. HOW DO YOU SEE THIS CHANGING OVER THE NEXT 10 YEARS?

Only two employers did not respond to this question. Of the 56 employers that did respond, almost half (46.4%) of employers thought that things would be more difficult. The most cited problem was that it would be more difficult to find employees in the future.

Some employers had fairly neutral responses. They mentioned ideas such as their respective industry landscape staying stable, or that problems in the future could be offset by existing strengths (e.g., more automation may influence the number of low-skilled labour positions, but this may be offset by more high-skilled jobs.

The remaining employers were either hopeful for the future or thought that things would be easier. Some employers indicated that primary immigration and secondary migration (e.g., immigrants moving to Niagara from Toronto) would make things easier moving forward.

FIGURE 6-1: PERCEPTIONS ABOUT THE FUTURE EMPLOYMENT LANDSCAPE

8.9%

14.3%

46.4%

30.4%

Harder

Neutral

Easier

Hopeful
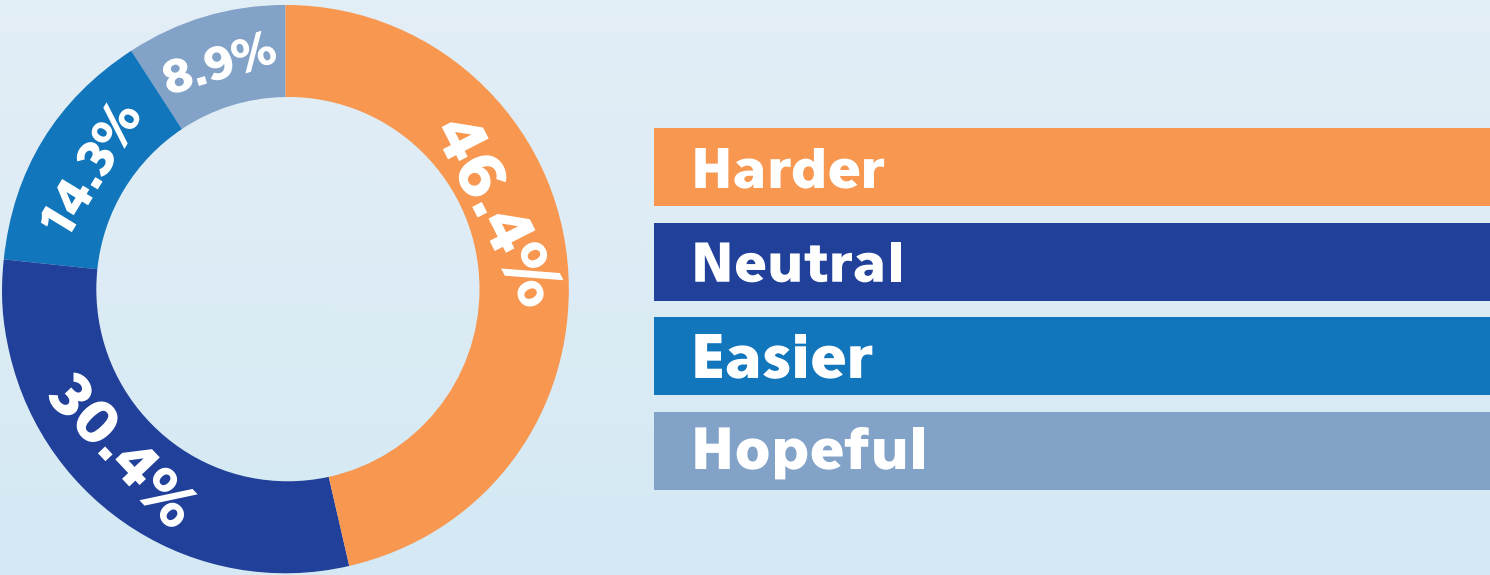
QUESTION 4: WHAT OTHER TOPICS WOULD BE IMPORTANT TO EXAMINE IN NIAGARA?

This question was asked to assess the needs of employers and to gain insight into what topics would be valuable in our future reporting. If employers could not provide answers, they were prompted with options such as housing or transportation. There were 13 employers that either did not respond to the question or indicated that there was nothing they could think of outside of what we currently report.

Table 6-3 outlines the common themes in answers that employers gave. The most recurring issues that employers brought up were related to transportation (e.g., getting to work), housing (e.g., affordability), and more information on industries in Niagara (e.g., which industries are growing, retention rates, etc). Employers were fairly concerned about people's ability to get to work. They also indicated that housing prices have been increasing and lowering affordability for people. Other topics that frequently came up were related to interest in the available skills (generally also tied to education of the workforce) in Niagara and what skills are available in other locations (e.g., for recruitment opportunities).

TABLE 6-3: EMPLOYER THEMES FOR CONSULTATION QUESTION 4

Theme	Number of Responses	Percentage of All Responses
Transportation	18	26.1%
Housing	18	26.1%
Industry	6	8.6%
Demographics	5	7.2%
Hiring	5	7.2%
Education	4	5.8%
Wage	4	5.8%
Government	3	4.3%
Skills	3	4.3%
Training	2	2.9%
Other	1	1.4%
Total	**69**	**100.0%**

ACTION PLAN

This action plan reflects our partnerships and community involvement as we work toward our strategic goals of promoting and supporting experiential learning, ensuring workforce skills alignment through increased access to timely and relevant labour market data, and facilitating 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 pairing existing educational programs with real-world labour market data and experiences. Our Advanced Manufacturing Partnership, for example, identified a need for increased interest in manufacturing careers to address anticipated retirements within the next ten years. At the same time, our ongoing consultations with local manufacturers indicated a challenging recruitment and retention climate in their sector. 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 – complete	Gain a comprehensive understanding of youth employment through the release of updated 2016 census data.	Completed through NWPB and the Niagara Community Observatory's publication of a youth employment policy brief in March of 2018. This report is available for review on NWPB's website – niagaraworkforce.ca	Brock University's Department of Geography, Brock University's Niagara Community Observatory
Medium term – in progress	Increase youth access to labour market data & build connections between educators and employers.	NWPB, in partnership with the Niagara Catholic District School Board, is delivering the *Pathways to Employment* project. This project brings parents, students, and employers together for panel discussions that speak to emerging careers in the Niagara region while allowing trusted industry professionals to speak to the importance of proactive career planning. The Pathways project also includes a career planning report that is distributed with report cards in the NCDSB. This report facilitates students & parents with the current labour market trends based on measurable job demand data. NWPB's activities on this project also include enhanced labour market data provided to both English-language school boards in Niagara such that the Grade 10 Careers Class can include a component of real-world data and actual job demand from local employers.	District School Board of Niagara, Niagara Catholic District School Board
Long term – in progress	Create a system that will allow multiple stakeholders in Niagara to work toward increasing employment and training outcomes.	NWPB is in the process of creating a comprehensive youth employment strategy as a first step in building this system. This report will provide service providers, as well as organizations who want to engage in direct activities supporting youth employment and training, a common point of reference that mobilizes all relevant labour market data on youth employment. This report is anticipated to be updated on a regular basis to reflect changing trends and employer needs. It is our goal to position this report as the one-stop shop in demonstrating an evidence-based need for specific youth employment supports in Niagara.	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 Training, Colleges, and Universities' strategic priority of supporting a flexible workforce that can respond to changing economic needs and expectations.

PRIORITY	GOAL	STRATEGY	PROPOSED PARTNERS
Short term – complete	Develop a high-level annual indictor of skills demand among local employers that can be responsibly extrapolated to reflect the Niagara region as a whole.	2018 saw the Employer One survey rebranded to host a greater focus on skill needs. Renewed partnership with Niagara Region's Planning Department will allow NWPB to expand the reach of the survey in subsequent deliveries.	Niagara Region Planning Department, Employment Ontario funded service providers
Medium term – in progress	Promote a culture of training for technical and interpersonal skills that are in-demand within the local employer base.	Through feedback from local Employment Ontario and Literacy and Basic Skills Providers, NWPB has rebuilt our Skills Matching Project such that it will be providing monthly updates to all employment service providers on measurable local job demand. These data are derived from an aggregation of public-facing job postings to ensure that employer-prioritized skills are reflected in the data analysis. Delivery of this project will help identify the skills (both technical and interpersonal) that are in demand by Niagara's employers.	Local Employment Services providers and Literacy and Basic Skills Providers
Long term – in progress	Build capacity for data-driven discussions on skills alignment across multiple regions to identify trends and patterns that affect multiple urban and rural areas in Ontario.	NWPB took first steps on this ambitious goal through the co-production of a Workforce Planning West profile with eight other local boards in Ontario. This was a first step at local boards collaborating to build a framework for understanding the skills and labour force challenges that are common to all regions. It is our hope that this project will lead to the identification of specific sectoral and skill issues that persist across all of western Ontario.	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 partnerships 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 – complete	Gain a better understanding of the employer-identified skill needs within the industry cluster that supports local agriculture and crop production.	NWPB completed a project that surveyed employers whose work directly supported regional agriculture. This project was delivered in collaboration with Niagara Region Economic Development. The outcomes allowed us to build a more detailed understanding of employer-identified skill needs among employers who did not directly work in agriculture, but whose goods and services supported agriculture. This project further allowed NWPB to build a framework for employer engagement that meaningfully measured sector clusters beyond strict North American Industrial Classification definitions. Completing this project provided a wealth of insight on employer needs within the local agriculture economy, particularly where employers reported challenges in finding and retaining general labourers.	Niagara Region Economic Development
Medium term – in progress	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.	This is an ongoing field of research for NWPB. Recent work delivered on 610AM CKTB over the course of three months took a municipally focused approach to understanding Niagara's commuter flow. These data helped show that much of Niagara's workforce commutes within the region, itself, and that further demonstrates the need to understanding the skills that are available within a workforce that is at once mobile and local. The addition of GO-train service to Niagara's transportation mix introduces further complexities into commuter flow data. It is NWPB's intent to produce another report on commuting, particularly focusing on commuter flow and occupation of employment and industry of employment.	Niagara Region, Community Benchmarks, CKTB

PRIORITY	GOAL	STRATEGY	PROPOSED PARTNERS
Long term – in progress	Understanding the impact of emerging sectors in Niagara.	As cannabis recently was legalized in Canada, this sector has begun to emerge in Niagara. NWPB will produce a comprehensive labour market report on the Cannabis industry by leveraging data from a variety of sources. NWPB will then collaborate with EO providers, Niagara College, Niagara Region, and Niagara's municipalities, to host a workshop day where professions in the Cannabis industry will provide insights into careers for entry-level workers, experienced workers, and related professional occupations.	Niagara College, Niagara Region, Niagara's municipalities, EO providers

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