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TRENDS
OPPORTUNITIES
PRIORITIES

TOP REPORT

January 2009

a member of

Local Boards
Network

Champions of Ontario's Local Labour Market Solutions

Trends, Opportunities & Priorities Report

The purpose of the report is to capture a current picture of the issues, trends, and community validated priorities relating to Waterloo Wellington's labour market planning and workforce development. The primary focus of this report is to achieve clarity and understanding of Waterloo Wellington's labour market composition and influences. This report serves as a reference document for community partners, business, labour, and government to support decision making and strategic planning around workforce development. WWTAB continues to seek out information and enhance the process model to maximize the link between key strategic priorities that influence the region's workforce and economic development.

About WWTAB...

Waterloo Wellington Training & Adjustment Board (WWTAB) is a community directed, non-profit corporation leading Waterloo Region and Wellington County in their approach to workforce development and labour market planning. In operation since 1997, WWTAB functions as a neutral broker of research, disseminator of information, and facilitator of collaborative partnership development.

Important Announcement:

As of April 1, 2009, WWTAB's area of operation will be expanded to include Dufferin County. A separate 2009 TOP report for Dufferin has been compiled and distributed by WWTAB. As a result of this expansion, WWTAB will change its name to the **Workforce Planning Board of Waterloo Wellington Dufferin**.

Our Vision:

We envision the continuous development of a leading edge workforce.

Our Mission:

Engage partners to find solutions to local workforce development needs.



Guiding today's workforce for tomorrow's workplace

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

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Executive Summary

Operating as part of the Local Boards Network of Ontario, WWTAB is one of 25 local planning board areas mandated through Ministry of Training, Colleges and Universities to conduct and disseminate local labour market research and engage community stakeholders in a planning process that supports local solutions to local issues. WWTAB is funded through the Employment Ontario initiative.

The Trends, Opportunities and Priorities (TOP) planning process for 2009 incorporated the use of a number of new Labour Market Indicators from a variety of sources. This new data was used to stimulate discussion and solicit input from a variety of stakeholders within the communities of Waterloo Region and Wellington County.

The analysis of this data has identified four (4) key trends relevant to either Waterloo Region, Wellington County or of relevance in both communities.

- High concentration of workers in manufacturing
- Gaps in educational attainment
- Soaring in-migration
- Decline in the number of medium and large employers

We recognize that many industry sectors and their workers are now facing unprecedented challenges and change and in a very short period of time. The TOP report can act as that focal point to keep us focused on emerging labour market challenges. It is a living document which will change as it responds to economic conditions.

The TOP Planning Charts commence on page 30. These charts highlight actions and activities put forward during recent community consultations to meet previously identified workforce development challenges and opportunities.

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their workers are now facing
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Waterloo Region Labour Market Status Data and Analysis

Waterloo Region is situated one hundred kilometers west of Toronto. Often referred to as Canada's Technology Triangle, the Region consists of the following: Cities of Cambridge, Kitchener and Waterloo; Townships of Wilmot, Wellesly, Woolwich and North Dumfries.

At the 2006 census, the total population of Waterloo Region was 478,120, up 39,606 (9%) from 2001. In comparison, Ontario's population grew by 6.6%.

Table A
Total Employment
Number and Percent Change (Kitchener CMA¹)
2002 – 2007

KCMA	2002	2003	2004	2005	2006	2007
# employed	226,000	234,000	237,000	250,000	251,000	250,000
% Change		3.5%	1.7%	5.5%	0.4%	-0.4%
Ontario	2002	2003	2004	2005	2006	2007
# employed	6,031,000	6,213,000	6,317,000	6,398,000	6,493,000	6,594,000
% Change		3.0%	1.7%	1.3%	1.5%	1.6%

Source: Statistics Canada, Labour Force Survey

From 2002-2007, Kitchener CMA has experienced a growth in total employment of 10.7% compared to Ontario's growth at 9.1%.

From 2006 to 2007 total employment declined by 0.4%.

¹ CMA - Census Metropolitan Area. Kitchener CMA includes all of Waterloo Region with the exception of the townships of Wilmot and Wellesly

From 2002-2007, Kitchener CMA
has experienced a growth
in total employment of 10.7%

Table B

Employment Trend by Industry
Number and Percent Change (Kitchener CMA)
2002 – 2007 (000's)

Industry	2002	2007	% change	Ontario % change
Total employed	226.0	250.3	10.7	9.3
Goods-producing sector	75.6	76.4	1.1	-3.2
Agriculture	2.1	2.2	4.8	24.7
Forestry, fishing, mining, oil and gas	0	0	0	0
Utilities	0	0	0	9.4
Construction	10.9	14.1	29.4	19.7
Manufacturing	61.5	58.6	-4.7	-13.1
Services-producing sector	150.4	173.9	15.6	13.8
Trade	34.9	36.6	4.9	11.3
Transportation and warehousing	10.4	9.0	-13.5	9.0
Finance, insurance, real estate and leasing	14.4	18.4	27.8	20.6
Professional, scientific and technical services	11.3	13.6	20.4	9.6
Business, building and other support services	9.1	10.9	19.8	19.4
Educational services	17.6	21.7	23.3	26.3
Health care and social assistance	18.3	24.2	32.2	15.3
Information, culture and recreation	8.0	10.1	26.3	10.1
Accommodation and food services	12.9	13.9	7.8	10.8
Other services	8.4	8.3	-1.2	8.1
Public administration	5.1	7.2	41.2	13.0

Source: Statistics Canada, Labour Force Survey

Although total employment in the Goods Producing (GP) Sector has increased by only 1.1% since 2002, employment in Ontario's GP Sector has declined significantly by 3.2% over the same period. The diversity of local opportunities in this sector appears to be helping the Region maintain and increase employment numbers, although the manufacturing industry has seen a significant decrease.

If we make an absolute comparison between employment in 2002 and 2007, in the Service Sector, the Transportation and Warehousing industry is one of only 2 industries experiencing a decline in the number of people employed. Employment in this industry is particularly prone to pressures from a variety of external economic factors, with fluctuating employment increases and decreases.

While the number of person employed in manufacturing decline from 61,500 in 2002 to 58,600 in 2007, manufacturing remains Waterloo Region's largest employment sector.

The 2 industries where growth in employment is highest are Public Administration at 41.2% and Health Care and Social Assistance at 32.2%. These growth rates are substantially higher than those for Ontario at 13% and 15.3% respectively.

Manufacturing Sector
 employment has declined by 4.7%
 from 2002 to 2007

Table 1A **Estimated Employment of Small and Medium Employers²**
(Key Industries³) 2007

NAICS ⁴		
722	Food Services and Drinking Places	15,180
541	Professional, Scientific and Technical Services	11,800
238	Specialty Trade Contractors	10,746
561	Administrative and Support Services	6,880
332	Fabricated Metal Product Manufacturing	5,412
445	Food and Beverage Stores	5,384
484	Truck Transportation	4,977
621	Ambulatory Health Care Services	4,881
333	Machinery Manufacturing	4,719
531	Real Estate	4,496
236	Construction of Buildings	3,940
813	Religious, Grant-Making, Civic, and Professional and Similar Organizations	3,682
551	Management of Companies and Enterprises	3,122
623	Nursing and Residential Care Facilities	2,756
336	Transportation Equipment Manufacturing	2,671
311	Food Manufacturing	2,550
611	Educational Services	2,380
334	Computer and Electronic Product Manufacturing	1,467
913	Local, Municipal and Regional Public Administration	451

Source: Statistics Canada, Canadian Business Patterns

Estimated employment of Waterloo Region's small and medium sized business (including owner operated business and business employing up to 199 employees) show a healthy balance between the goods producing and service sectors. The diversity of key employment industries among SMEs and a healthy balance between the goods producing and service sectors, may reduce local vulnerability to economic factors affecting the local workforce.

Table 1B **Estimated Employment Increases for Small and Medium Enterprises**
(Key Industries) 2003-2007

NAICS		% Change
311	Food Manufacturing	29.4
611	Educational Services	28.7
722	Food Services and Drinking Places	17.6
913	Local, Municipal and Regional Public Administration	17.5
813	Religious, Grant-Making, Civic, and Professional and Similar Organizations	17.2
336	Transportation Equipment Manufacturing	17.1
621	Ambulatory Health Care Services	15.1
334	Computer and Electronic Product Manufacturing	7.5
445	Food and Beverage Stores	6.8
484	Truck Transportation	5.2
623	Nursing and Residential Care Facilities	4.7

Source: Statistics Canada, Canadian Business Patterns

² Small and medium employers - includes Owner Operated businesses up to 100-199 employee size

³ Key Industries based on top 19 industries by total estimated employment

⁴ NAICS - North American Industry Classification System

**Table 1C Estimated Employment Decreases for Small and Medium Enterprises
(Key Industries) 2003-2007**

NAICS		% Change
236	Construction of Buildings	-26.7
332	Fabricated Metal Product Manufacturing	-20.6
551	Management of Companies and Enterprises	-16.8
333	Machinery Manufacturing	-8.7
238	Specialty Trade Contractors	-8.5
561	Administrative and Support Services	-7.4
531	Real Estate	-4.9
541	Professional, Scientific and Technical Services	-3.7

Source: Statistics Canada, Canadian Business Patterns

**Table 2A Number of Employers by Employee Size Range
Waterloo Region
December 2003 to December 2007**

Employee Size Range	Number of Employers 2003	Number of Employers 2007	Absolute Change	Percent Change
0	16,650	17,256	606	3.5%
1-4	6,861	6,786	-75	-1.1%
5-9	2,411	3,021	610	20.2%
10-19	1,745	1,810	65	3.6%
20-49	1,362	1,210	-87	-7.2%
50-99	504	472	-32	-6.8%
100-199	247	226	-21	-9.3%
200-499	122	128	6	4.7%
500+	45	45	0	0.0%
Total	29,947	30,954	1,007	3.3%

Source: Statistics Canada, Canadian Business Patterns

While the total number of employers in Waterloo Region increased by 1,007 between 2003 and 2007, not all employee size ranges contributed to this increase. For example the number of employers with 20 to 49 employees declined by 87 over the time period. In contrast the number of employers with 5 to 9 employees increased by 610. Industries experiencing significant increases in the number of employers include: Food Services and Drinking places, Textile Mills, Utilities, Mining and Quarrying, Telecommunications, Professional, Scientific and Technical, Ambulatory Health Services and Educational Services.

In the manufacturing sector, the following industries experienced growth in the 5 to 19 employee ranges: Electrical Equipment, Transportation Equipment and Miscellaneous Manufacturing.

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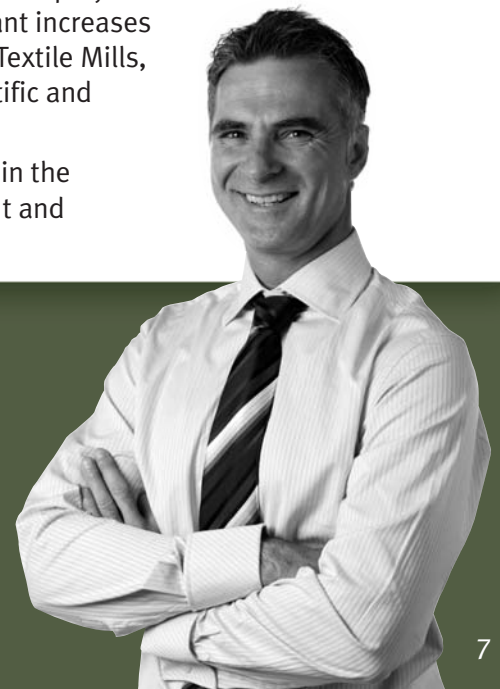


Table 2B Distribution of Employers by Employee Size Range
Waterloo Region
December 2003 to December 2007

Employee Size Range	Number of Employers 2003	Distribution	Number of Employers 2007	Distribution
0	16,650	55.6%	17,256	55.7%
1-4	6,861	22.9%	6,786	21.9%
5-9	2,411	8.1%	3,021	9.8%
10-19	1,745	5.8%	1,810	5.8%
20-49	1,362	4.5%	1,210	3.9%
50-99	504	1.7%	472	1.5%
100-199	247	0.8%	226	0.7%
200-499	122	0.4%	128	0.4%
500+	45	0.2%	45	0.1%
Total	29,947	100.0%	30,954	100.0%

Source: Statistics Canada, Canadian Business Patterns

If we look at the distribution of employers by employee size range, only 1.2% of all employers in Waterloo Region have more than 100 employees while almost 60% of all businesses are owner operated. Self employment and businesses with 1-4 employees make up over 77% of all businesses in the area.

Table 3A Industries Exhibiting an Increase in the Total Number of Employers (Top 20)
December 2003 to December 2007

NAICS		Total Number of Employers 2003	Total Number of Employers 2007	Absolute Change	Percent Change
523	Securities, Commodity Contracts, and Other Financial Investment and Related Activities	956	1,345	389	40.7%
531	Real Estate	2,347	2,710	363	15.5%
484	Truck Transportation	887	1,238	351	39.6%
621	Ambulatory Health Care Services	934	1,152	218	23.3%
551	Management of Companies and Enterprises	1,459	1,634	175	12.0%
492	Couriers and Messengers	95	147	52	54.7%
611	Educational Services	307	352	45	14.7%
524	Insurance Carriers and Related Activities	221	261	40	18.1%
445	Food and Beverage Stores	391	428	37	9.5%
416	Building Material and Supplies Whole.-Dist.	221	255	34	15.4%
444	Building Material and Garden Equipment and...	115	144	29	25.2%
541	Professional, Scientific and Technical Ser.	3,888	3,914	26	0.7%
517	Telecommunications	30	54	24	80.0%
413	Food, Beverage and Tobacco Wholesaler-Dist.	89	112	23	25.8%
441	Motor Vehicle and Parts Dealers	282	301	19	6.7%
519	Other Information Services	6	22	16	266.7%
446	Health and Personal Care Stores	206	222	16	7.8%
221	Utilities	25	40	15	60.0%
488	Support Activities for Transportation	147	162	15	10.2%
333	Machinery Manufacturing	282	297	15	5.3%

Source: Statistics Canada, Canadian Business Patterns

Table 3B Industries Exhibiting a Decrease in the Total Number of Employers (Top 20)
December 2003 to December 2007

NAICS		Total Employers 2003	Total Employers 2007	Absolute Change	Percent Change
112	Animal Production	986	789	-197	-20.0%
238	Specialty Trade Contractors	2,632	2,438	-194	-7.4%
236	Construction of Buildings	1,094	979	-115	-10.5%
453	Miscellaneous Store Retailers	424	338	-86	-20.3%
811	Repair and Maintenance	977	893	-84	-8.6%
332	Fabricated Metal Product Manufacturing	403	357	-46	-11.4%
443	Electronics and Appliance Stores	217	177	-40	-18.4%
419	Wholesale Electronic Markets, Agents-Brokers	236	199	-37	-15.7%
237	Heavy and Civil Engineering Construction	350	316	-34	-9.7%
722	Food Services and Drinking Places	1,063	1,030	-33	-3.1%
417	Machinery, Equipment and Supplies W/D	493	462	-31	-6.3%
418	Miscellaneous Wholesaler-Distributors	327	300	-27	-8.3%
323	Printing and Related Support Activities	136	110	-26	-19.1%
518	Data Processing, Hosting, and Related Ser.	36	16	-20	-55.6%
561	Administrative and Support Services	1,288	1,268	-20	-1.6%
721	Accommodation Services	98	80	-18	-18.4%
111	Crop Production	250	232	-18	-7.2%
454	Non-Store Retailers	139	123	-16	-11.5%
451	Sporting Goods, Hobby, Book and Music Store	217	201	-16	-7.4%
414	Personal and Household Goods Wholesale-D.	229	214	-15	-6.6%

Source: Statistics Canada, Canadian Business Patterns

Since 2003, there has been a significant loss of 20% of businesses in Animal Production and over 7% of those in Crop Production. This may be reflecting the shift away from smaller family run farms to larger operations. As farmers retire, there are not enough young entrants to replace them as many choose off-farm employment instead.



Labour Market Trend – Soaring In-Migration

An area's migration patterns are often indicative of its labour force characteristics. Areas offering the greatest employment opportunities attract more persons than they lose. Areas that offer fewer employment opportunities tend to lose more persons than they attract. Over the 2001 to 2006 time-period, Waterloo Region attracted more than 101,000 people while losing approximately 77,000 to out-migration. The substantial net migration gain for the Region reflects the strength of the area's labour market.

When compared to other, similar-sized communities such as Niagara, London and Windsor, Waterloo Region's net migration significantly outpaces their migration gains. That said, the Region's migration patterns pose a local training challenge as a significant number of individuals attracted to the Region have a lower educational attainment and, in some cases, fewer transferable labour market skills.

Migration statistics show that Waterloo Region is attracting significantly more in-migrants than the number of persons lost to out-migration (migration numbers included persons moving within Ontario, Canada and internationally). Waterloo Region's historically strong employment growth trends clearly attract persons looking for employment opportunities.

**Table 4 Migration Characteristics
2001 to 2006**

Age Group	In-migrants	Out-migrants	Net-migrants
0-17	22,368	16,570	5,798
18-24	18,454	13,353	5,101
25-44	43,746	31,988	11,758
45-64	11,790	11,119	671
65+	5,223	4,131	1,092
Total	101,581	77,161	24,420

Source: Statistics Canada, Taxfiler

Table 5 shows the occupations where Waterloo Region has significantly higher or lower proportion of workers than Ontario. Given the Region's high concentration of employment in manufacturing it is not surprising that four manufacturing occupations have a considerably higher proportion of workers than Ontario.

**Table 5 Selected Occupations Where Distribution is Significantly Different from Ontario
2006**

	Waterloo Region Labour Force	Distribution %	Ontario Labour Force	Distribution %
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	4,415	1.6%	151,710	2.3%
H3 Machinists, metal forming, shaping and erecting occupations	6,805	2.5%	85,725	1.3%
J1 Machine operators in manufacturing	10,555	3.9%	162,555	2.5%
J2 Assemblers in manufacturing	11,245	4.1%	160,060	2.4%
J3 Labourers in processing, manufacturing and utilities	7,025	2.6%	109,950	1.7%

Source: Statistics Canada, 2006 Census



Labour Market Trend – Gaps in Educational Attainment

A trend that persists in Waterloo Region is gaps in educational attainment. Compared to Ontario, the Region has a significantly higher proportion of persons with secondary education or less; a similar number of persons with a college certificate or diploma; and, considerably fewer persons with university credentials. This is a concern since provincial job trends show employers are creating jobs for persons with post secondary qualifications. For example, between 1998 and 2007, Ontario created 1,166,900 net jobs for persons with a post secondary certificate, diploma or degree. Net jobs created in Ontario for persons with less than post secondary credentials declined by 26,400 over this same period.

While many individuals with lower educational attainment have marketable skills gained through experience and life-long learning, those who do not are vulnerable to job loss, particularly if they are engaged in routine/repetitive work - the type of work that is disappearing the fastest. Training and development actions that help these individuals remain employable must also be a priority in the community.

While it may sound counter-intuitive, the magnitude of training and development need in Waterloo Region may be disproportionately large despite of the prosperity of the economy and strength of the labour market.

Table 6 **Educational Attainment (Distribution)**
2006

	Waterloo Region %	Ontario %
Age cohort 15-24		
No certificate, diploma or degree	42.2	39.9
High School Certificate or Equivalent	39.5	38.6
Apprenticeship or Trades Certificate or Diploma	2.2	2.3
College, CEGEP or other non-university Certificate or Diploma	8.7	9.9
University Certificate Diploma or Degree	7.6	9.3
Total		
Age cohort 25-34		
No certificate, diploma or degree	10.2	8.7
High School Certificate or Equivalent	26.3	23.8
Apprenticeship or Trades Certificate or Diploma	6.1	6.0
College, CEGEP or other non-university Certificate or Diploma	25.7	24.3
University Certificate Diploma or Degree	31.7	37.2
Total		
Age cohort 35-44		
No certificate, diploma or degree	12.7	10.5
High School Certificate or Equivalent	25.9	24.3
Apprenticeship or Trades Certificate or Diploma	9.0	8.6
College, CEGEP or other non-university Certificate or Diploma	24.4	23.9
University Certificate Diploma or Degree	28.0	32.7
Total		

	Waterloo Region %	Ontario %
Age cohort 45-54		
No certificate, diploma or degree	17.4	14.5
High School Certificate or Equivalent	27.7	27.2
Apprenticeship or Trades Certificate or Diploma	10.5	9.6
College, CEGEP or other non-university Certificate or Diploma	21.1	21.5
University Certificate Diploma or Degree	23.3	27.2
Total		
Age cohort 55-64		
No certificate, diploma or degree	24.9	22.1
High School Certificate or Equivalent	25.2	24.4
Apprenticeship or Trades Certificate or Diploma	11.1	10.9
College, CEGEP or other non-university Certificate or Diploma	17.1	17.5
University Certificate Diploma or Degree	21.7	25.1
Total		

Source: Statistics Canada, 2006 Census

When compared to Ontario, Waterloo Region's educational attainment under-performs Ontario in many educational attainment categories. For example, the Region has proportionally more person with a high school certificate or less. In fact, if Waterloo were to equal Ontario's proportion over 8,000 persons would need attainment post secondary credentials. This is cause for serious concern as employment opportunities for persons with high school or less are vanishing.

With respect to trade certificates and diploma's and College certificates and diploma's the Region's educational attainment is similar to Ontario's or modestly higher. The same can not be said for Waterloo Region's University educated, as the Region under-performs Ontario by a significant margin. Waterloo Region would need to increase the number of people holding a University, Certificate, Diploma and Degree by over 13,000 persons to equal Ontario.

Table 7 Waterloo's Competitive Disadvantage

	Improvement Required in Waterloo to Match Ontario's Educational Attainment
University Certificate Diploma or Degree	Increase by 13,369 persons
No certificate, diploma or degree	Decrease by 8,000 persons

Source: Derived from 2006 Census

The high number of people without high school clearly indicates that providing opportunities to access upgrading and retraining are key priorities if the people in this category are to remain employable.

According to the Regional Municipality's Ontario Works Service Plan, the % of caseload with less than high school was just over 50% in October 2007.

Table 8 Number of Persons by Income⁵ Category

	2003		2006	
	Number of Persons	Distribution %	Number of Persons	Distribution %
Less than \$5,000	30,620	9.1%	29,900	8.4%
\$5,000+	307,720	90.9%	326,110	91.6%
\$10,000+	276,070	81.6%	296,590	83.3%
\$15,000+	243,850	72.1%	265,890	74.7%
\$20,000+	211,890	62.6%	233,860	65.7%
\$25,000+	185,000	54.7%	206,170	57.9%
\$35,000+	134,680	39.8%	155,930	43.8%
\$50,000+	76,310	22.6%	93,310	26.2%
\$75,000+	28,600	8.5%	39,370	11.1%
\$100,000+	12,020	3.6%	16,910	4.7%
\$150,000+	4,340	1.3%	6,100	1.7%
Total	338,340		356,010	
Median Income	\$28,100		\$30,600	

Source: Statistics Canada, Taxfiler

Between 2003 and 2006 Waterloo Region's median income (includes income from all sources) increased from \$33,834 to 35,601. The percent of the population with a total income of over \$35,000 increased from 39.8 percent in 2003 to 43.8 percent in 2006. In 2006, 42.1% of taxfilers were reporting a total income of less than \$25,000. Although this chart shows total income and not just employment income, a comparison to the "Living Wage rate" for Waterloo Region, is currently set at \$13.62/hr or \$24,788 per annum.

Table 9 Economic Dependency Ratio (EDR)
2006

	Males %	Females %	Total %	Ontario %
Government Transfers	7.57	20.03	11.98	13.91
Employment Insurance	0.78	2.33	1.33	1.34
Old Age Security/Net Fed	1.98	5.23	3.13	3.86
Canada Pension Plan	3.07	5.7	4.0	4.48
Canadian Child Tax Benefit	0.08	3.4	1.25	1.41
GST/HST Credit	0.23	0.65	0.38	0.47
Workers Compensation	0.66	0.72	0.68	0.7
Social Assistance	0.59	1.42	0.88	1.23
Pro Tax Credit/Family Benefit	0.19	0.56	0.32	0.42
Private Pension	6.36	7.58	6.79	9.0

Source: Statistics Canada, Taxfiler

In Waterloo Region, women show a much higher dependency on government transfers than men. When compared to Ontario, Waterloo Region is less dependant on government transfers than Ontario as a whole.

⁵ Total Income

Manufacturing



Labour Market Trend – High Concentration of Workers in Manufacturing

Waterloo Region has a distinctive economic base in that approximately 23 percent of the employed labour force works in the manufacturing sector. This represents the highest concentration of manufacturing workers in a Census Metropolitan Area in Canada.

Within Ontario, 14.4 percent of the employed labour force works in manufacturing. Over the last several years, competition from low wage counties, a widely fluctuating dollar and the recent recession have resulted in a significant number of manufacturing facility closures and employee layoffs. The negative economic repercussions for Ontario’s manufacturing sector are disproportionately felt in both Waterloo Region and Wellington County.

Given the high concentration of manufacturing workers in the region, training and development initiatives/opportunities for manufacturing workers must be of the highest priority.

Table 10 Manufacturing Employment in Kitchener CMA 2007

Year	Number Employed in Manufacturing	Total Employment	% of Total Employment
2007	58,600	250,300	23.4%

Source: Statistics Canada, Labour Force Survey

Since 2003, the % of total employment in manufacturing has dropped from 26.7% to 23.4% in 2007 however Waterloo Region still has the highest concentration of manufacturing employment in Canada.

The 2006 census data shows that a total of 20,340 people were employed in the Processing & Manufacturing Operator category. 5,415 of those (27%) had less than a Grade 12 education. In the Labourers in Processing, Manufacturing & Utilities category, the total employed is 6,510 with 2,370 (36%) having not completed high school.

These classes of worker appear to be at most risk during the current shift in the local manufacturing sector. Priority must be given to assisting these workers to upgrade their skills/education levels if they are to remain employable in a layoff situation.



Table 11 Number of Manufacturing Employers by Sub Sector

NAICS		December 2003	June 2008	
311	Food Manufacturing	122	115	-7
312	Beverage and Tobacco Product Man.	11	14	3
313	Textile Mills	21	18	-3
314	Textile Product Mills	45	37	-8
315	Clothing Manufacturing	43	34	-9
316	Leather and Allied Product Manufacturing	17	12	-5
321	Wood Product Manufacturing	100	94	-6
322	Paper Manufacturing	13	13	0
323	Printing and Related Support Activities	136	107	-29
324	Petroleum and Coal Product Manufacturing	11	10	-1
325	Chemical Manufacturing	54	56	2
326	Plastics and Rubber Products Man.	99	96	-3
327	Non-Metallic Mineral Product Manufacturing	68	54	-14
331	Primary Metal Manufacturing	25	26	1
332	Fabricated Metal Product Manufacturing	403	353	-50
333	Machinery Manufacturing	282	299	17
334	Computer and Electronic Product Man.	90	90	0
335	Electrical Equipment, Appliance and Comp.	53	57	4
336	Transportation Equipment Manufacturing	85	83	-2
337	Furniture and Related Product Man.	139	134	-5
339	Miscellaneous Manufacturing	168	177	9

Source: Statistics Canada, Canadian Business Patterns

Table 12 Number of Manufacturing Employers by Employee Size Range
Waterloo Region

Employee Size Range	Number of Manufacturing Employers Dec. 2003	Number of Manufacturing Employers Dec. 2007	Number of Manufacturing Employers June 2008	Absolute Change 2003 to 2008	Absolute Change 2007 to 2008
Owner Operated	699	630	638	-61	8
1-4	408	310	327	-81	17
5-9	200	241	234	34	-7
10-19	190	225	235	45	10
20-49	220	206	206	-14	0
50-99	125	117	113	-12	-4
100-199	82	75	71	-11	-4
200-499	39	34	32	-7	-2
500+	22	24	23	1	-1
Total	1,985	1,862	1,879	-106	17

Source: Statistics Canada, Canadian Business Patterns

Wellington County Labour Market Status Data and Analysis

Wellington County consists of the following: City of Guelph, the Towns of Erin and Minto and the Townships of Centre Wellington, Guelph/Eramosa, Mapleton and Puslinch. At the 2006 census, the total population of Wellington County was 200,425, up 13,112 (7%) from 2001. In comparison, Ontario's population grew by 6.6%.

Table A **Total Labour Force**
Number and Percent Change (Wellington County) 2001 – 2006

Wellington County	2001	2006	% Change
Labour Force	105,095	114,470	8.9%

Source: Statistics Canada, 2006 Census

Forecasts prepared for the Ontario government indicate that by 2011 the population of Wellington County, including the City of Guelph is expected to increase to 223,000. The same forecasts suggest that employment will increase to 117,000 in 2011 from its current level of 114,470.

Table B **Labour Force Trend by Industry (Census)**
Number and Percent Change 2001 – 2006

	2001	2006	% Change
Total labour force	105,095	114,470	8.9%
Industry - Not applicable	925	890	-3.8%
All industries	104,170	113,575	9.0%
11 Agriculture, forestry, fishing and hunting	4,440	4,460	0.5%
21 Mining and oil and gas extraction	135	230	70.4%
22 Utilities	565	580	2.7%
23 Construction	5,850	6,475	10.7%
31-33 Manufacturing	24,675	25,410	3.0%
41 Wholesale trade	4,820	5,395	11.9%
44-45 Retail trade	10,060	10,515	4.5%
48-49 Transportation and warehousing	4,280	4,625	8.1%
51 Information and cultural industries	1,655	1,870	13.0%
52 Finance and insurance	3,430	3,615	5.4%
53 Real estate and rental and leasing	1,275	1,605	25.9%
54 Professional, scientific and technical services	5,790	6,815	17.7%
55 Management of companies and enterprises	170	150	-11.8%
56 Administrative and support, waste management and remediation services	3,020	4,290	42.1%
61 Educational services	9,415	10,255	8.9%
62 Health care and social assistance	8,575	9,680	12.9%
71 Arts, entertainment and recreation	2,050	2,055	0.2%
72 Accommodation and food services	5,775	6,245	8.1%
81 Other services (except public administration)	4,500	5,320	18.2%
91 Public administration	3,700	3,990	7.8%

Source: Statistics Canada, 2006 Census

From 2001 to 2006, change in the total labour force in Wellington County closely mirrored that of Ontario with Wellington increasing 8.9% and Ontario 8.2%. During the same period, the only industry in Wellington showing a decline in the labour market was Management of Companies and Enterprises.

Table 1A **Estimated Employment of Small and Medium Employers⁵**
(Key Industries⁶) 2007

NAICS ⁷		# employed
722	Food Services and Drinking Places	5,648
541	Professional, Scientific and Technical Services	4,958
238	Specialty Trade Contractors	3,657
561	Administrative and Support Services	3,018
621	Ambulatory Health Care Services	2,788
332	Fabricated Metal Product Manufacturing	2,132
112	Animal Production	2,094
336	Transportation Equipment Manufacturing	1,901
813	Religious, Grant-Making, Civic, and Professional and Similar Organizations	1,846
531	Real Estate	1,835
484	Truck Transportation	1,824
445	Food and Beverage Stores	1,769
333	Machinery Manufacturing	1,765
551	Management of Companies and Enterprises	1,506
326	Plastics and Rubber Products Manufacturing	1,099
611	Educational Services	776
913	Local, Municipal and Regional Public Administration	472
335	Electrical Equipment, Appliance and Component Manufacturing	435
622	Hospitals	146
312	Beverage and Tobacco Product Manufacturing	55

Source: Statistics Canada, Canadian Business Patterns

Table 1B **Estimated Employment Increases for Small and Medium Enterprises**
(Key Industries) 2003 – 2007

NAICS		% Change
312	Beverage and Tobacco Product Manufacturing	129.2%
561	Administrative and Support Services	36.5%
913	Local, Municipal and Regional Public Administration	24.2%
611	Educational Services	20.3%
722	Food Services and Drinking Places	18.8%
445	Food and Beverage Stores	18.7%
336	Transportation Equipment Manufacturing	15.9%
621	Ambulatory Health Care Services	13.6%
813	Religious, Grant-Making, Civic, and Professional and Similar Organizations	11.5%
484	Truck Transportation	7.5%
326	Plastics and Rubber Products Manufacturing	7.3%
333	Machinery Manufacturing	4.1%
541	Professional, Scientific and Technical Services	3.7%
332	Fabricated Metal Product Manufacturing	3.1%
622	Hospitals	2.1%

Source: Statistics Canada, Canadian Business Patterns

⁵ Small and medium employers - includes Owner Operated businesses up to 100-199 employee size

⁶ Key Industries based on top 20 industries by total estimated employment

⁷ NAICS - North American Industry Classification System

**Table 1C Estimated Employment Decreases for Small and Medium Enterprises
(Key Industries) 2003 – 2007**

NAICS		% Change
112	Animal Production	-20.3%
238	Specialty Trade Contractors	-10.2%
335	Electrical Equipment, Appliance and Component Manufacturing	-21.2%
531	Real Estate	-10.0%
551	Management of Companies and Enterprises	-2.0%

Source: Statistics Canada, Canadian Business Patterns

Labour Market Trend - Decline in the Number of Medium and Large Employers

Of significant consequence to employment and employment opportunities in Wellington County is the loss in the number of employers operating in the 20 to 500 plus employee size ranges. Between December 2003 and December 2007, the number of employers in these employee size ranges declined by 46. Specifically, the 20 to 49 employee size range experienced the a loss of 27 employers; employers in the 50 to 99 employee size range declined by 3; the 100 to 199 employee size range experienced a net loss of 9 employers; and, the 500 plus employee range declined by 2 employers over the time period.

Interestingly, Wellington County's migration patterns showed in-migration significantly outpacing out-migration, resulting in the net gain of more than 9,000 persons between 2001 and 2006. The seemingly contradictory dynamics of employer decline and population increases suggests that a growing percentage of Wellington County's labour force works outside the area. From a training and development perspective, it is advised that further research be conducted to confirm this assumption before identifying or undertaking training initiatives.

**Table 2A Number of Employers by Employee Size Range
December 2003 to December 2007**

Employee Size Range	Number of Employers 2003	Number of Employers 2007	Absolute Change	Percent Change
0	8,384	8,862	478	5.7%
1-4	3,168	3,165	-3	-0.1%
5-9	1,012	1,314	302	29.8%
10-19	740	781	41	5.5%
20-49	539	512	-27	-5.0%
50-99	180	177	-3	-1.7%
100-199	97	88	-9	-9.3%
200-499	52	47	-5	-9.6%
500+	16	14	-2	-12.5%
Total	14,188	14,960	772	5.4%

Source: Statistics Canada, Canadian Business Patterns

In Wellington County the only growth in the number of employers has been in small employee size categories, including employers with up to 19 employees. There have been significant losses in the number of employers employing more than 20 employees.

**Table 2B Distribution of Employers by Employee Size Range Distribution
December 2003 to December 2007**

Employee Size Range	Number of Employers 2003	Distribution %	Number of Employers 2007	Distribution %
0	8,384	59.1%	8,862	59.2%
1-4	3,168	22.3%	3,165	21.2%
5-9	1,012	7.1%	1,314	8.8%
10-19	740	5.2%	781	5.2%
20-49	539	3.8%	512	3.4%
50-99	180	1.3%	177	1.2%
100-199	97	0.7%	88	0.6%
200-499	52	0.4%	47	0.3%
500+	16	0.1%	14	0.1%
Total	14,188	100.0%	14,960	100.0%

Source: Statistics Canada, Canadian Business Patterns

If we look at distribution by employee size range, only 1.0% of all employers in Wellington County have more than 100 employees while 59% of all businesses are owner operated. Self employment and businesses with 1-4 employees make up over 80% of all businesses in the area. These distribution percentages are similar to Wellington County's direct neighbour Waterloo Region.

**Table 3A Industries Exhibiting an Increase in the Total Number of Employers (Top 20)
December 2003 to December 2007**

NAICS		Total Employers 2003	Total Employers 2007	Absolute Change	Percent Change
531	Real Estate	828	1,056	228	27.5%
523	Securities, Commodity Contracts, and Other Financial Investment and Related Activities	380	607	227	59.7%
551	Management of Companies and Enterprises	533	676	143	26.8%
621	Ambulatory Health Care Services	410	488	78	19.0%
814	Private Households	0	75	75	100.0%
484	Truck Transportation	393	465	72	18.3%
541	Professional, Scientific and Technical Ser.	1,724	1,790	66	3.8%
111	Crop Production	306	336	30	9.8%
561	Administrative and Support Services	525	551	26	5.0%
332	Fabricated Metal Product Manufacturing	118	143	25	21.2%
611	Educational Services	148	172	24	16.2%
812	Personal and Laundry Services	247	271	24	9.7%
237	Heavy and Civil Engineering Construction	167	188	21	12.6%
813	Religious, Grant-Making, Civic, and Professional and Similar Organizations	287	308	21	7.3%
711	Performing Arts, Spectator Sports and Related	125	143	18	14.4%
492	Couriers and Messengers	21	38	17	81.0%
236	Construction of Buildings	508	523	15	3.0%
418	Miscellaneous Wholesaler-Distributors	137	152	15	10.9%
623	Nursing and Residential Care Facilities	41	53	12	29.3%
446	Health and Personal Care Stores	75	84	9	12.0%

Source: Statistics Canada, Canadian Business Patterns

**Table 3B Industries Exhibiting a Decrease in the Total Number of Employers (Top 20)
December 2003 to December 2007**

NAICS		Total Employers 2003	Total Employers 2007	Absolute Change	Percent Change
112	Animal Production	1,736	1,540	-196	-11.3%
453	Miscellaneous Store Retailers	201	156	-45	-22.4%
722	Food Services and Drinking Places	473	442	-31	-6.6%
311	Food Manufacturing	86	64	-22	-25.6%
485	Transit and Ground Passenger Transport.	97	77	-20	-20.6%
442	Furniture and Home Furnishings Stores	80	65	-15	-18.8%
238	Specialty Trade Contractors	972	959	-13	-1.3%
451	Sporting Goods, Hobby, Book and Music Store	109	96	-13	-11.9%
454	Non-Store Retailers	49	37	-12	-24.5%
415	Motor Vehicle and Parts Wholesaler-Dist.	63	52	-11	-17.5%
443	Electronics and Appliance Stores	82	71	-11	-13.4%
713	Amusement, Gambling and Recreation Ind.	102	91	-11	-10.8%
419	Wholesale Electronic Markets, Agents-Brokers	86	78	-8	-9.3%
444	Building Material and Garden Equipment	78	70	-8	-10.3%
337	Furniture and Related Product Man.	65	58	-7	-10.8%
416	Building Material and Supplies Whole.-Dist.	103	96	-7	-6.8%
113	Forestry and Logging	16	11	-5	-31.3%
322	Paper Manufacturing	19	14	-5	-26.3%
323	Printing and Related Support Activities	51	46	-5	-9.8%
333	Machinery Manufacturing	108	103	-5	-4.6%

Source: Statistics Canada, Canadian Business Patterns

Migration statistics show that Wellington County is attracting significantly more in-migrants than the number of persons lost to out-migration (migration numbers included persons moving within Ontario, Canada and internationally). With the greatest gain of net-migrants in the 25-44 age cohort, Wellington is clearly attracting working age persons.

**Table 4 Migration Characteristics
2001 to 2006**

Age Group	In-migrants	Out-migrants	Net-migrants
0-17	11,139	9,256	1,883
18-24	9,186	7,912	1,274
25-44	22,203	18,185	4,018
45-64	7,701	6,578	1,123
65+	3,712	2,983	729
Total	53,941	44,914	9,027

Source: Statistics Canada, Taxfiler

Table 5 shows the occupations where Wellington County has significantly higher or lower proportion of workers than Ontario. Given the County's high concentration of employment in manufacturing it is not surprising that several manufacturing occupations have a considerably higher proportion of workers than Ontario. It is also not surprising given the economic contribution of the agricultural sector that Wellington County has a higher concentration of occupations unique to agriculture.

Table 5

**Selected Occupations Where Distribution is
Significantly Different from Ontario
2006**

		Wellington # Employed	Wellington %	Ontario # Employed	Ontario %
B0	Professional occupations in business and finance	2,025	1.8%	182,195	2.8%
B5	Clerical occupations	10,035	8.8%	660,100	10.0%
C0	Professional occupations in natural and applied sciences	3,820	3.3%	266,690	4.0%
E0	Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	1,840	1.6%	151,710	2.3%
E1	Teachers and professors	6,175	5.4%	260,435	4.0%
G2	Retail salespersons and sales clerks	4,375	3.8%	290,195	4.4%
H3	Machinists, metal forming, shaping and erecting occupations	2,555	2.2%	85,725	1.3%
I0	Occupations unique to agriculture, excluding labourers	3,990	3.5%	95,870	1.5%
J1	Machine operators in manufacturing	5,140	4.5%	162,555	2.5%
J2	Assemblers in manufacturing	4,540	4.0%	160,060	2.4%
J3	Labourers in processing, manufacturing and utilities	2,795	2.4%	109,950	1.7%

Source: Statistics Canada, 2006 Census

Labour Market Trend – Gaps in Educational Attainment

A trend that persists in Wellington County is gaps in educational attainment. Compared to Ontario, the regions have a significantly higher proportion of persons with secondary education or less; a similar number of persons with a college certificate or diploma; and, considerably fewer persons with university credentials. This is a concern since provincial job trends show employers are creating jobs for persons with post secondary qualifications. For example, between 1998 and 2007, Ontario created 1,166,900 net jobs for persons with a post secondary certificate, diploma or degree. Net jobs created in Ontario for persons with less than post secondary credentials declined by 26,400 over this same period.

While many individuals with lower educational attainment have marketable skills gained through experience and life-long learning, those who do not are vulnerable to job loss, particularly if they are engaged in routine/repetitive work - the type of work that is disappearing the fastest. Training and development actions that help these individuals remain employable must also be a priority in the community.

While it may sound counter-intuitive, the magnitude of training and development need in Wellington County may be disproportionately large despite of the prosperity of the economy and strength of the labour market.

Table 6 **Educational Attainment (Distribution)**
2006

	Wellington County %	Ontario %
Age cohort 15-24		
No certificate, diploma or degree	41.8	39.9
High School Certificate or Equivalent	39.6	38.6
Apprenticeship or Trades Certificate or Diploma	2.3	2.3
College, CEGEP or other non-university Certificate or Diploma	8.4	9.9
University Certificate Diploma or Degree	8.0	9.3
Total		
Age cohort 25-34		
No certificate, diploma or degree	12.2	8.7
High School Certificate or Equivalent	26.7	23.8
Apprenticeship or Trades Certificate or Diploma	6.0	6.0
College, CEGEP or other non-university Certificate or Diploma	21.5	24.3
University Certificate Diploma or Degree	33.5	37.2
Total		
Age cohort 35-44		
No certificate, diploma or degree	12.0	10.5
High School Certificate or Equivalent	26.1	24.3
Apprenticeship or Trades Certificate or Diploma	9.4	8.6
College, CEGEP or other non-university Certificate or Diploma	23.0	23.9
University Certificate Diploma or Degree	29.6	32.7
Total		
Age cohort 45-54		
No certificate, diploma or degree	15.2	14.5
High School Certificate or Equivalent	27.9	27.2
Apprenticeship or Trades Certificate or Diploma	10.2	9.6
College, CEGEP or other non-university Certificate or Diploma	20.4	21.5
University Certificate Diploma or Degree	26.3	27.2
Total		
Age cohort 55-64		
No certificate, diploma or degree	21.4	22.1
High School Certificate or Equivalent	24.9	24.4
Apprenticeship or Trades Certificate or Diploma	11.2	10.9
College, CEGEP or other non-university Certificate or Diploma	17.1	17.5
University Certificate Diploma or Degree	25.3	25.1
Total		

Source: Statistics Canada, 2006 Census

In most categories, Wellington County is comparable to the Ontario average however there are some categories that are still below the Provincial average.

In the University category Wellington County would need to increase its University, Certificate, Diploma and Degree holders by almost 2,500 persons to equal Ontario.

In the case of those with no certification or high school certificate, Wellington County has over 1,800 more people in this category than for Ontario.

Table 7 Wellington's Competitive Disadvantage

	Improvement Required in Wellington to Match Ontario's Educational Attainment
University Certificate Diploma or Degree	Increase by 2,467 persons
No certificate, diploma or degree	Decrease by 1,862 persons

Source: Derived from 2006 Census

The number of people without high school clearly indicates that providing opportunities to access upgrading and retraining are key priorities if the people in this category are to remain employable.

Table 8 Number of Persons by Income⁵ Category

	2003		2006	
	Number of Persons	Distribution %	Number of Persons	Distribution %
Less than \$5,000	13,250	9.1	12,170	8.2
\$5,000+	131,660	90.9	136,620	91.8
\$10,000+	118,030	81.5	123,750	83.2
\$15,000+	104,300	72.0	111,000	74.6
\$20,000+	91,100	62.9	98,050	65.9
\$25,000+	80,080	55.3	87,130	58.6
\$35,000+	59,520	41.1	67,550	45.4
\$50,000+	33,700	23.3	40,690	27.3
\$75,000+	12,560	8.7	16,930	11.4
\$100,000+	5,580	3.6	7,470	5.0
\$150,000+	2,080	1.4	2,780	1.9
Total	144,900		148,790	
Median Income	28,700		31,500	

Source: Statistics Canada, Taxfiler

In 2006, Wellington County's median income reached \$31,500. Between 2003 to 2006, the number of persons who reported a total income of over \$35,000 increased from 59,520 (41.1 percent) to 67,550 (45.4 percent) of the population in 2006.

Table 9 Economic Dependency Ratio (EDR) 2006

	Males %	Females %	Total %	Ontario %
Government Transfers	7.76	19.58	12.02	13.91
Employment Insurance	0.56	2.08	1.1	1.34
Old Age Security/Net Fed	2.27	5.64	3.48	3.86
Canada Pension Plan	3.48	6.21	4.46	4.48
Canadian Child Tax Benefit	0.08	3.09	1.17	1.41
GST/HST Credit	0.22	0.6	0.36	0.47
Workers Compensation	0.51	0.52	0.51	0.7
Social Assistance	0.44	0.92	0.61	1.23
Pro Tax Credit/Family Benefit	0.2	0.54	0.32	0.42
Private Pension	8.22	9.32	8.61	9.0

Source: Statistics Canada, Taxfiler

In Wellington County, dependency upon government transfers was slightly lower than the provincial average in all categories. A comparison of Wellington's men and women shows that a higher proportion of women received government transfer income.

⁵ Total Income

Manufacturing

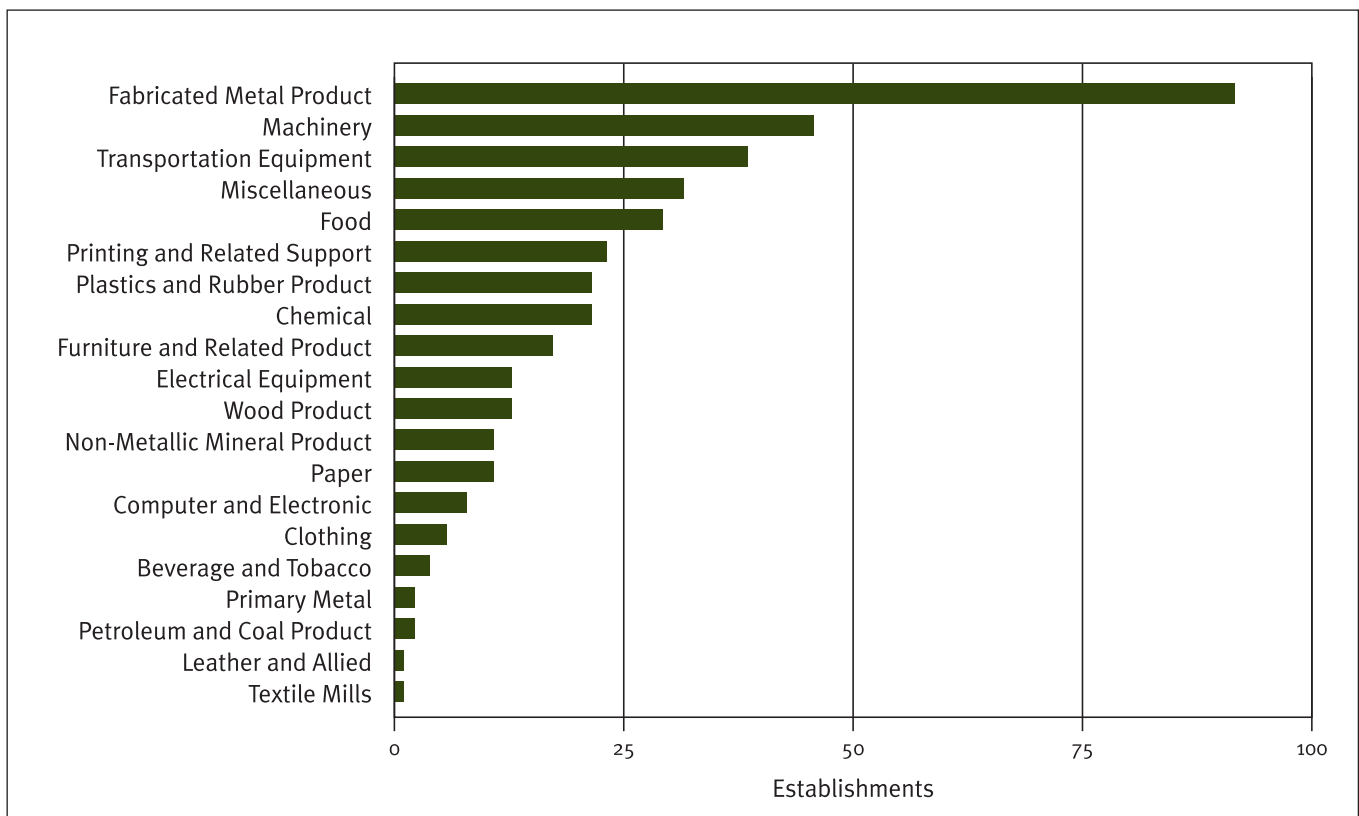
Labour Market Trend – High Concentration of Workers in Manufacturing

Wellington County has a distinctive economic base in that approximately 22 percent of the employed labour force works in the manufacturing sector. This concentration of manufacturing workers is second only to Waterloo Region in Canada.

Within Ontario, 14.4 percent of the employed labour force works in manufacturing. Over the last several years, competition from low wage counties, a widely fluctuating dollar and the recent recession have resulted in a significant number of manufacturing facility closures and employee layoffs. The negative economic repercussions for Ontario's manufacturing sector are disproportionately felt in both Waterloo Region and Wellington County.

Given the high concentration of manufacturing workers in the area, training and development initiatives/opportunities for manufacturing workers must be of the highest priority.

Table 10 Manufacturing Industries by Share of Establishments
Guelph, December 2007



Source: Statistics Canada, Canadian Business Patterns

The manufacturing sector in Wellington County accounted for approximately 24,400 people in 2006.

Table 11 **Number of Manufacturing Employers by Employee Size Range**
Wellington County

Employee Size Range	Number of Manufacturing Employers - 2003	Number of Manufacturing Employers - 2007	Absolute Change 2003 to 2007
Owner Operated	264	248	-16
1-4	164	142	-22
5-9	61	79	18
10-19	56	63	7
20-49	60	75	15
50-99	47	52	5
100-199	34	36	2
200-499	34	32	-2
500+	5	6	1
Total	725	733	8

Source: Statistics Canada, Canadian Business Patterns

Waterloo Wellington

Employment Forecasts

Although the full effect of the current economic downturn may not be felt for some time, there is still optimism regarding employment prospects for Waterloo Region. BMO Capital Market estimates show Waterloo Region and Guelph employment growth still ahead of Ontario and Canada in the 2009-2012 time period. Unemployment rates are also projected to be lower than those of Ontario and Canada.

	Waterloo-Guelph	Canada	Ontario
Employment (% change) 2009-12	1.5%	1.0%	0.9%
Unemployment Rate 2009-12	5.4%	6.1%	6.4%

Place of Work

As of 2006, 58.0 percent of Wellington County's employed residents worked in the county and 23.3 percent of employed residents worked outside the area. The remaining 18.7 percent of employed residents did not have a consistent place of work. In comparison, 73.5 percent of Waterloo Region's employed residents worked in Waterloo Region.

Income Growth

Growth in the labour force translates into employment income growth. Total Employment Income in Waterloo Region rose from \$9.9 billion in 2003 to \$11.3 billion in 2006. Self employment income rose by \$30 million during the same period. The median income rose from \$28,100 to \$30,600.

In Wellington County, Total Employment Income rose from \$4.2 billion in 2003 to \$4.7 billion in 2006. Self employment income rose by \$8 million during the same period. The median income rose from \$28,700 to \$31,500.

Biotechnology

More than 1/3 of all employers in this sector are currently experiencing a shortage of skills. Top 3 challenges are 1) lack of candidates with required skills sets/experience; 2) insufficient funds to recruit; 3) competition for qualified candidates. In Ontario companies are reporting staff turnover rate of 65.7%. A new Guelph-Waterloo Partnership in Biotechnology has been established to develop a local cluster.

Health

During a recent consultation with employers in the health sector, a number of ideas were highlighted and put forward as being potentially useful actions for the sector to consider. These actions will be further developed over the coming months. Recent research indicates the local health sector is facing possible shortages of thousands of workers over the next 5-10 years.

Skilled Trades

The Provincial Government plans to establish an Ontario College of Trades. It is envisioned to be a self regulating body that will be responsible for the practice of designated trades in Ontario.

Conestoga College has been suggested as the site for a new Centre of Excellence in Food Processing, with the proposed development of an Institute of Food Technology at the new Cambridge campus to be open in 2010. Discussions are underway re curriculum development for a new Process Operator apprenticeship in the Food Processing sub sector.

From April 2007-March 2008 the Waterloo apprenticeship office registered 2030 apprentices. This includes K-W, Cambridge, N. Wellington, Dufferin and Guelph.

In Waterloo Wellington 6.3% of women indicated they were in an apprenticeship or had a trades certificate at the 2006 census.

Persons With Disabilities

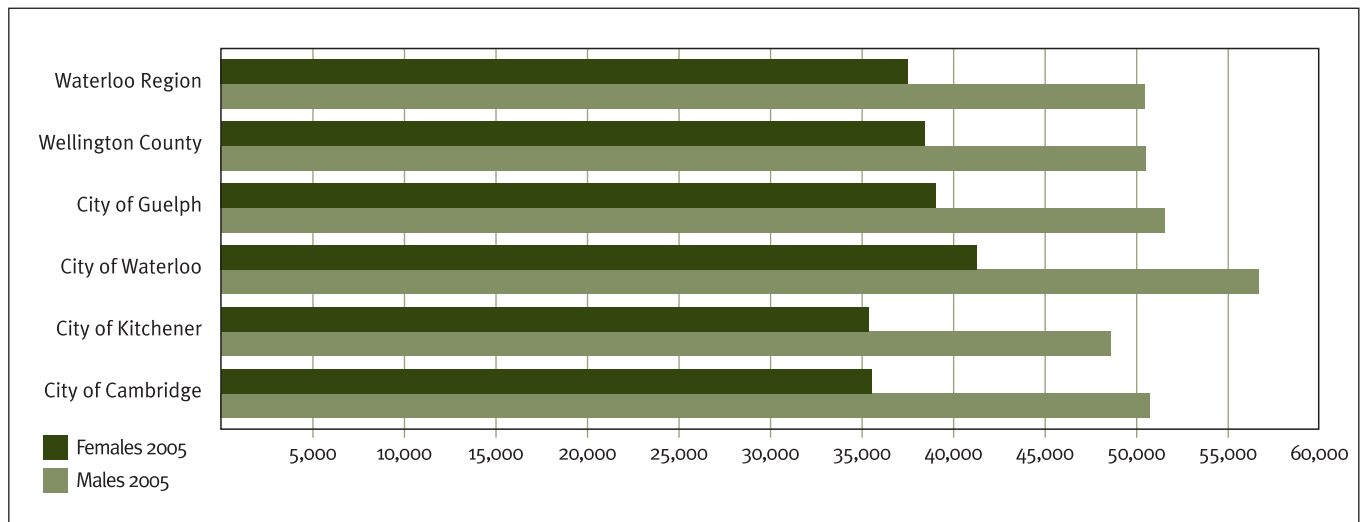
Employment service providers supporting persons with disabilities are reporting some increases in the number of clients accessing their services. It would appear that instances of mental health related disabilities are increasing.

Changes to the Accessibility for Ontarians with Disabilities Act, 2005 is all about making Ontario accessible for persons with disabilities. Businesses in Ontario will have to meet certain accessibility standards, the first of which, Customer Service, came into effect on January 1, 2008. For information on the standards related to this legislation, and what changes you can and are legally required to implement visit www.accesson.ca and www.mcass.gov.on.ca/mcass/english/pillars/accessibilityOntario

Women

There still appear to be huge differences in the earnings made by men and women. Although the earnings reported by women have increased since the last census, in this area, the average median income can vary by as much as approximately \$15,000 per annum.

Chart 1 Median Earnings - Persons 15 years and over who worked full year, full time (\$)



Source: Statistics Canada, 2006 Census, Community Profiles

Women still dominate in certain categories of the workforce. As of Census 2006, in Social Science, Education and Government Services, women made up 65% of the total workers however if we look at Clerical Occupations, that number increases to 73%.

In middle managerial positions, women made up 38% of the workforce and in senior management positions that number drops to 21%. Neither of these figures is significantly higher than in 2001.

15.2% of women reported having less than a high school diploma at the 2006 census. This is slightly lower than the 16.8% of the total population reporting no diploma.



There still appear to be huge differences in the earnings made by men and women

Aboriginal

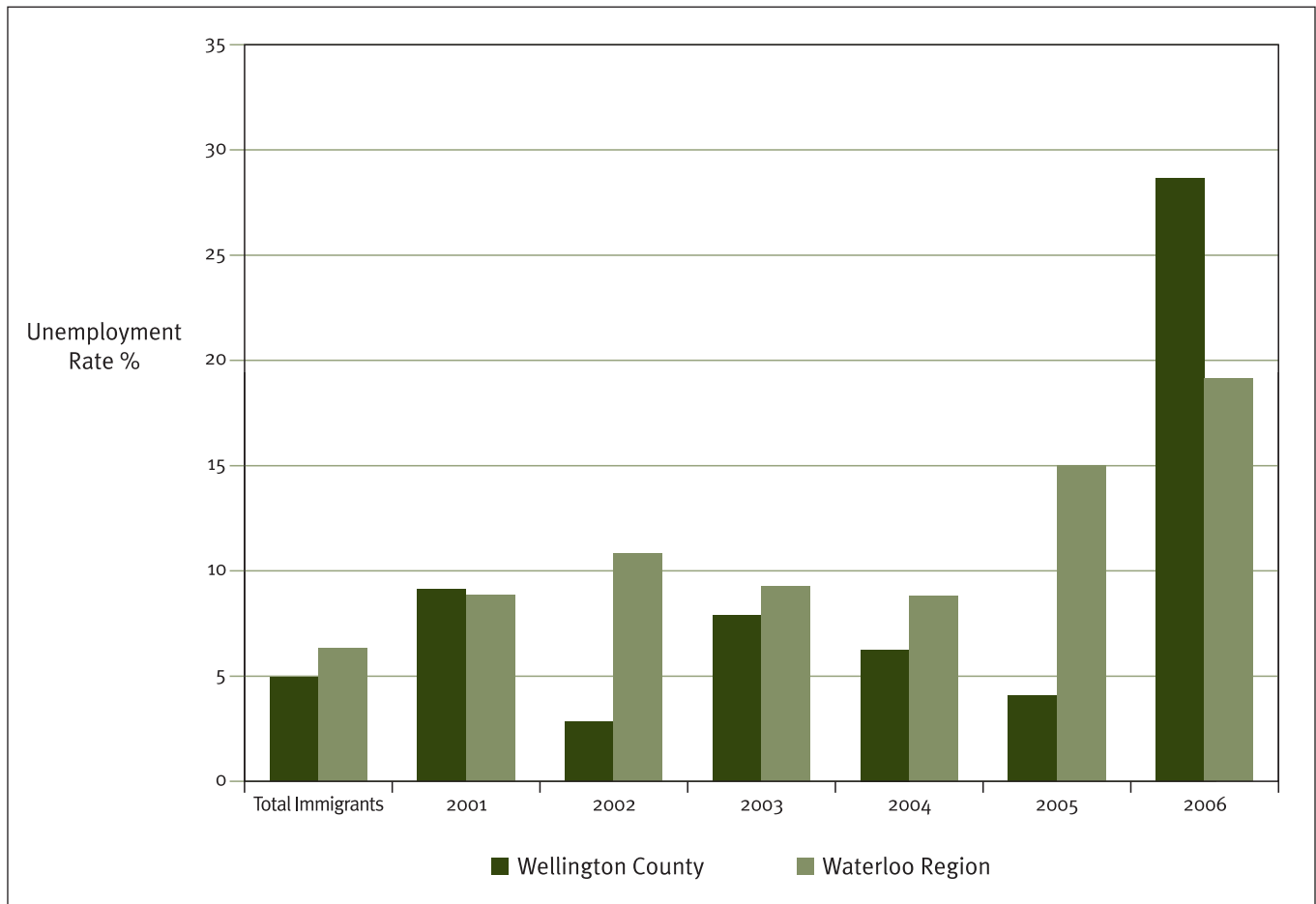
26.7% of the 3425 aboriginals who identified themselves in the 2006 census as part of the labour force had less than a high school diploma. According to Statistics Canada, the aboriginal population has great potential for expanding the labour force. The population is young and growing and the employment rate is still well below that of non-aboriginal people.

Only 210 self-identified aboriginals were in management positions in 2006.

Immigrants

Immigrant unemployment rates appear to be highest within the first two years of arrival. These high rates of unemployment could be reflective of barriers to employment e.g. education levels and/or language skills. More research may be necessary to determine if these levels are fairly stable or are increasing as we attract more and more new immigrants. Increasing levels could have an impact on existing programs and services.

Chart 2 New Immigrant Unemployment Rates by Year of Immigration



Source: Statistics Canada, 2006 Census, Special Tabulation WWTAB

the aboriginal employment rate is
still well below
that of non-aboriginal people

Local Adjustment – Downsizing/Layoffs

Adjustment programs are usually struck when a unionized workplace is closing. An adjustment committee is organized by employee representatives, elected by their peers. One employee representative becomes the Action Centre coordinator and runs the facility that assists workers in transitioning to new employment, accessing retraining and coping with other issues that arise.

At this time, there are currently 2 action centres operating in Cambridge: ClosetMaid and Cambridge Stampings. ClosetMaid's operations are still active, but the centre has seen a lot of activity as many workers are considering retraining options. Cambridge Stampings' centre has been in operation since May and shared space with American Standard until that centre closed in July. NCR opened its action centre in Waterloo this year. In Kitchener, there are currently 4 action centres in operation. The smallest of these centres is IAC where many of the workers had 25 years of service or more with the company and some have not completed high school. MTD's action centre was highly successful in adjusting workers over the past year and is still active as the operations in Kitchener have now closed. Lear and Ledco share an action centre which works with the 65 workers from Ledco and the Lear workers who have been laid-off in rounds. Kitchener Frame announced that its operations would be closing in December 2008. The action centre is working with a workforce where 75% of workers have between 5 and 15 years experience in manufacturing.

A number of temporary layoffs have been announced however 2 additional Cambridge plants, Cambridge Fine Foods and Pittsburgh Glass Works, will close in 2009.

There are currently 2 action centres operating in Wellington County: Guelph Products and Engel. Guelph Products, the former Collins and Aikman, is assisting 260 workers who have experience working as assemblers and with injection molding. Engel Canada's workforce consisted of many highly skilled workers who had their certifications. The coordinator estimated that approximately 75% of its workers were adjusted as of November 2008.

In the past year, Cargill's Better Beef plant also had an adjustment committee. In some cases, workers were not proficient in the English language and this may have contributed to difficulties in finding new employment. The centre closed in July of 2008 and some of the workers were called back to Better Beef.

Local Adjustment – Growth

In the past year, a few industries have been experiencing growth and hence are looking for people to fill vacancies. The food processing industry is one of these industries. One food processor is opening an expansion that will require 20 more general labourers as well as a couple of people to fill shipping and quality assurance positions. Much like the food processing sector, the transportation industry is also seeking workers. At one job fair earlier this year, two local transportation companies were seeking truck drivers with AZ or DZ licenses and a company that supplies tires and tire service to transportation companies was looking for salespeople and technicians.

The health care sector is also still looking for people. Although the hospitals have recently announced that some staff positions will be eliminated, the home care and long-term care segments of the sector are still seeking personal support workers, caregivers and nurses – both registered and practical.

The Information Technology sector in Waterloo Region is experiencing substantial growth and is this is making it difficult to find enough suitably skilled workers. Communitech, a Waterloo-based technology association with members from all aspects of the IT sector, is continually organizing recruitment events across North America and the world. Local job fairs have recently been held as a number of employers look to fill hundreds of positions. According to job fair promotional materials, occupations in demand include Software developers (Java, .Net, API, C++ and more), Quality Assurance Analyst, Product Manager, Sales, Accounting and Finance.

In Wellington County, this growth is supplemented by development in the life sciences and agri-business sector. The City of Guelph launched a campaign "Grow Guelph" in the latter part of the year, with the university and local biotech companies. Through this initiative, the area strives to be a centre for agri-food excellence and to encourage new investment. New investment may lead to new industry which will require skilled people to work in these new companies.

Trends, Opportunities and Priorities (TOP) Planning Process

Community Consultation:

The purpose/goal of the consultation process is to maximize on-the-ground input into the planning process. This is an opportunity to hear from job seekers, employees, employers, unions and other key stakeholder groups on what, in their opinion, is working in Waterloo Wellington, what is not working, and what changes they see as important to create a strong local labour market planning framework.

Expected Outcomes of this planning process include:

- Greater awareness of how the current approach supports, or fails to support, labour market development
- Identification of issues, priorities and opportunities that influence and inform Waterloo Wellington's labour market plan development
- A strong understanding of related and inter-connected activities and initiatives ongoing or planned in Waterloo Wellington
- An evidence-based approach to planning

Since the last report, WWTAB has regularly met with stakeholders from local industry, labour, educators/trainers and others to discuss issues and bring forward that information. This has included both formal and informal interviews, participation at industry specific HR meetings/conferences and employer surveys, both WWTAB driven and partner driven.

WWTAB hosted three formal consultation sessions and one informal session where we had an opportunity to gather additional information at a previously organized event for employers in Guelph.

2008 Consultation Sessions:

June – Guelph Chamber of Commerce

October – Ramada Inn, Guelph

October – Holiday Inn, Cambridge

November – Health Sector

WWTAB also participated in the Region of Waterloo (ROW) Forward conference, held in June 2008, which identified strategies to support the local manufacturing sector. Relevant activities identified have been incorporated into this TOP report.

A number of challenges and opportunities have been brought forward during the community consultation process and actions were identified to try to address these at the local level.

The TOP planning charts for 2009-2010 report on the status of previous actions as well as capturing current and proposed new actions in the area of local workforce development.

Most of the actions brought forward relate directly to the new trends identified by this current labour market analysis and so we will continue to monitor these activities and ensure that relevant activities are captured in future reports

For a full list of all participants see Appendix 1.

The TOP Planning Charts reflect the
opinions and knowledge
of local stakeholders

Challenges/Opportunities:

Under-represented Populations in the Labour Force – Women

- Women's access to occupations where they are under-represented remains an issue
- Women already in, or trying to access, the labour market often lack the skills required to fully participate in the workforce resulting in fewer employment opportunities

Actions Since Last Report:

- Development of awareness materials/campaign around existing programming for distribution with a focus on adjustment committees (timelines are January 2008 - September 2008) - brochure has been developed and has been distributed to Action Centres across Southwestern Ontario
- 200 women attended a non-traditional career fair. Awareness material was distributed to local women's groups, school and employment service providers. Event held Bingemans - September 26, 2008
- Over 100 women participated in Women in a Science, Engineering, Trades and Technology conference in May 2008 in Guelph

Actions	Partners	Timelines	Expected Results/Outcomes
Development of Essential Skills upgrading for laid off low skilled women	Project Read Literacy Network (Lead) Partners include WWTAB, Focus for Ethnic Women, Conestoga College, Cambridge YMCA Immigrant Services, The Literacy Group, Barrday Inc., Northern Lights Canada, Douglas College (British Columbia)	2008 - 2010	Development of Essential Skills upgrading for laid off low skilled women - OLES Project Funded and started May 2008 which is developing curriculum for women over 40
Proposed Actions	Proposed Partners	Timelines	Expected Results/Outcomes
Promotion of non-traditional occupations to women/re-training opportunities to women	WWTAB, Skills Canada-Ontario, local school boards, Action Centres	April 2009- March 2010	Top 20 non-traditional careers identified. 2,000 information sheets developed and distributed




women's access to occupations
where they are under-represented
remains an issue

Challenges/Opportunities: Under-represented Populations in the Labour Force – Immigrants

- Our immigrant workforce is under-utilized due to a lack of recognition of credentials and past work experience resulting in fewer relevant employment opportunities
- Engaging employers more effectively will help integrate immigrants into the labour force more easily resulting in reduced immigrant unemployment

Actions Since Last Report:

- Funding approved for Regional Immigrant Portal Project Region of Waterloo is the project leader while WRIEN's Steering Committee serves as Community input mechanism.
- Local Immigrant Partnership proposal submitted by City of Guelph. Steering Committee Established Summer 2008
- Bridge Program for Social Workers underway.
- 9 former doctors, dentists and midwives graduated from Fast Track to Registered Practical Nurse Program in September 2008
- The Region of Waterloo, in partnership with the Waterloo Public Library, WRIEN, and other community agencies is producing a web portal for information provision to immigrants and newcomers in our community. In May of 2008, a full specification model of the portal was approved. This model is currently being used to develop the portal in preparation for testing by Fall of 2008, and with intent to launch in March of 2009.
- The Immigrant Loan Program funding was approved and the program is now launched and operational.
- The 2008 Competitive Advantage Forum was held November 6th at the Waterloo Inn with approx. 100 participants. Three employers were recognized: Dalsa Inc., Enermodal Engineering and Sunlife Financial
- The WRIEN visitation program has gravitated to the New Canadian Employment Connections Program allowing the visitation level to triple.
- The 2008/2009 Immigrant/employer recruiting and networking program will continue with 3 to be held in KW and 2 in Cambridge
- The Waterloo Region Internship Program launched January 2009.
- WRIEN launched its 2nd generation website www.wrien.com that is more function driven to enhance user friendliness.
- The WRIEN Steering Committee hosted a public forum in June to gather input about WRIEN progress and directions for the future. Following the forum the Steering Committee has defined a process for succession planning to address plans for what happens after the 3 year mandate is completed in June of 2009. Steering Committee has agreed to a 4th year mandate.



immigrant workforce is under-utilized
due to a lack of recognition
of credentials and past work experience

Challenges/Opportunities: Under-represented Populations in the Labour Force – Immigrants

Actions	Partners	Timelines	Expected Results/Outcomes
Research – Matching employment and skill levels/education	WWTAB (Lead), WRIEN	April-October 2009	1,500 copies of research report will be circulated. Occupations with highest concentrations of matched and mismatched skill levels/education among immigrants will be identified.
Bridge Program for Social Workers	The Working Centre	2008-2010	Project underway. 15 candidates completed the program November 2008. 2 nd group of 15 starts February 4, 2009, 3 rd group starts September 2009.
Ongoing outreach to local employers	WRIEN	2009-2010	160 employers will be visited
Waterloo Region Immigrant Portal	Region of Waterloo (Lead)	March 2009	Testing will occur in early 2009. Formal launch of Immigrant Portal website targeted for March 2009
Develop and launch Immigrant Employment Resource Guide	WRIEN (Lead)	February 2009	Create and launch both printed and web versions to assist SMEs in cost effectively hiring and keeping internationally trained professionals. 2,500 copies to be distributed initially.
Form an employer Diversity Peer Group to meet monthly	WRIEN (Lead), Grand Valley Human Resources Professional Association	December 2008	Peer Group established to enhance community influence in the area of expanding the number of diverse/inclusive workplaces in Waterloo Region
Proposed Actions	Proposed Partners	Timelines	Expected Results/Outcomes
Development of new Fast Track programs	Conestoga College (Lead), WWTAB	2008-2010	2 new FastTrack programs will be developed and implemented
Celebrate successes - publication	WRIEN (Lead)	2008-2009	Present employer best practices and success stories through the Employer Guide, Competitive Advantage Forum, Enews and website www.wrien.com

Challenges/Opportunities: Under-represented Populations in the Labour Force – Persons with Disabilities

- As the persons with disabilities population continues to grow, we need to recognize and utilize the skills, education and qualifications of persons with disabilities and the talent pool they offer.

Actions Since Last Report:

- Making Cent\$ of Abilities Conference held June, 2008 Community champions will be identified as well as opportunities for local action.
- Persons with Disabilities Employment Network - “Making Cent\$ of Abilities Coalition” - Steering Committee formed September 17, 2008. Launch expected Winter 2008/9
- In September 2007, WWTAB partnered with Canadian Manufacturers and Exporters to host the local launch of CME’s 10/20 campaign and again in August 2008 to soft launch Making Cent\$ of Abilities Coalition concept in Guelph Wellington at Guelph chamber of Commerce Lunch and Learn event.

Actions	Partners	Timelines	Expected Results/Outcomes
Development and distribution of resource materials/information to employers re: hiring Persons with Disabilities	Making Cent\$ of Abilities Coalition**	April 2009- March 2010	5,000 resource booklets will be distributed to local employers
Proposed Actions	Proposed Partners	Timelines	Expected Results/Outcomes
Promotion of Persons with Disabilities in Skilled Trades	Skills Canada-Ontario, WWTAB, Making Cent\$ of Abilities Coalition	June 2009- May 2010	An event/activity will be developed to highlight careers in skilled trades to persons with disabilities

- ** Members of the Making Cent\$ of Abilities Coalition include the following communities, organizations and employers: Greater Kitchener Waterloo Chamber of Commerce, Canadian Mental Health Association, Ontario March of Dimes, City of Kitchener, City of Waterloo, WWTAB, Guelph Chamber of Commerce, Conestoga College Institute of Technology and Advanced Learning, Ministry of Community and Social Services, Regional Municipality of Waterloo; Social Purchasing Portal of Waterloo Region, Wilfrid Laurier University, REM Web Solutions; Research In Motion.

we need to recognize and utilize the
skills, education and qualifications
of persons with disabilities



Challenges/Opportunities:

Requirement for Higher Levels of Education/Rising Skills Demand

- The lack of Essential Skills in the workplace limits workers ability to adapt resulting in difficulties retaining employment or being promoted to higher positions
- Lower education levels amongst older workers is resulting in difficulties retaining and/or finding new employment

Actions Since Last Report:

- Centralized resource centre opened at Conestoga Doon Campus Summer 2008

Actions	Partners	Timelines	Expected Results/Outcomes
Develop and pilot Essential Skills package for use in small and medium sized workplaces	Conestoga College (Lead), Greater Kitchener Waterloo Chamber of Commerce	April 2008 – June 30 2009	Pilot completed with a minimum of 5 SME's
Develop strategies to address Essential Skills needs and provide custom Essential Skills Interventions to HR staff and employees in small and medium sized workplaces	Conestoga College (Lead), Douglas College (BC)	May 2008- November 2009	Significant uptake of Essential Skills implementation with employers and 150 employees that have increased their Essential Skills levels
Marketing of workplace literacy programs	Project READ Literacy Network	Ongoing	

Proposed Actions	Proposed Partners	Timelines	Expected Results/Outcomes
Delivery of Ontario Skills Passport workshops	Project READ Literacy Network	2009 - specifics to be determined pending project funding	Workshops to be delivered to employment service agencies
Provision of training subsidies for employed workers			

The lack of
Essential Skills in the workplace
limits workers ability to adapt

Challenges/Opportunities: Shift In Key Employment Sectors

- Need to support key manufacturing base to ensure that employee skill levels match employer requirements
- Youth now entering the workforce have different expectations of the workplace and its culture which is leading to problems in workplace retention
- Address the critical shortage of professionals and skilled workers in the health care sector
- Need for increased awareness of the diversity of local career opportunities

Actions Since Last Report:

- Region of Waterloo (ROW) Forward forum held June 2008. Working groups identified September 2008. (For information on Working Group activities and members, contact WWTAB)
- Construction High Skills Major Diploma implemented
- Health Care Career Symposium held to discuss HR issues in the health sector November 2008
- 500 students attended health care career showcase November 2008
- Launch of Manufacturing Innovation Network (MIN) for Waterloo Region – January 2008
- ROW Forward Collaboration Group recommendation to Regional Council to provide financial support to MIN

Actions	Partners	Timelines	Expected Results/Outcomes
Establish Community Action Centre	Waterloo Region District Labour Council (Lead)	October 2008 - May 2009	A Community Action Centre will be established to support non-unionized laid off workers
Develop promotional material to assist in displaced workers' personal journey to re-employment	WWTAB (Lead - development), Promotion/Distribution through Adjustment Committees, Action Centres, Employment Resource Centres		Using existing materials, 2000 information pamphlets developed, printed and distributed through adjustment centres and employment service providers
Research to identify 3-5 industries poised for growth to identify retraining opportunities	WWTAB (Lead), ROW Forward Community Infrastructure group		3-5 emerging/poised for growth industries identified and skill development requirements established
Development of regular LM information bulletin for career/guidance counsellors	WWTAB (Lead), Area school boards	April 2009- March 2010	6 labour market bulletins will be developed and distributed specifically to career/guidance counsellors

Proposed Actions	Proposed Partners	Timelines	Expected Results/Outcomes
Promote industry clustering opportunities	No Lead identified		
Develop regional business retention and expansion program	No Lead identified		
Development & Distribution of pamphlet/website on FAQ/Did you know model re local investment and funding opportunities for new/existing enterprises	ROW Forward Investment Group (Lead)		
Create marketing and awareness of employment opportunities in health services	No Lead identified		
Local adult awareness campaign re second career strategy	WWTAB, Conestoga College, Employment Service Providers	2009-2010	

Challenges/Opportunities: Skilled Trades Shortages

- Support the participation of youth entering workplace and experiential education programs that focus on occupation shortages in skilled and specialized trades
- Support local industry by improving the quality of skilled trades applicants as well as providing HR support to SMEs
- Continue to promote opportunities in the trades as careers of choice to youth and parents

Actions Since Last Report:

- New Workshops and tours at unionized training facilities were developed for high school students in 2008/9 and 2009/10 school years

Proposed Actions	Proposed Partners	Timelines	Expected Results/Outcomes
Promotion of Persons with Disabilities in Skilled Trades	Skills Canada-Ontario, WWTAB, Making Cent\$ of Abilities Coalition	June 2009- May 2010	An event/activity will be developed to highlight careers in skilled trades to persons with disabilities
Support for development of new apprenticeships – Food processing	WWTAB, Alliance of Ontario Food Processors, Conestoga College	March 2009- June 2010	Curriculum developed for Food Processing Operator Apprenticeship

Continue to promote opportunities in the
trades as careers of choice
to youth and parents

Challenges/Opportunities: Older Worker Retention

- An aging workforce requires preparation for succession planning and knowledge transfer to avoid lost productivity
- Target awareness and recruitment to those occupations most impacted by the aging phenomenon to avoid shortages
- Encourage easier access to self employment for older displaced workers
- Intergenerational understanding/communication

Actions Since Last Report:

- Program to establish a seniors mentors bureau. Knowledgeshare launched June 2008. www.ksww.com
- First mentors and mentees identified

Actions	Partners	Timelines	Expected Results/Outcomes
Research to determine at risk occupations and alternate work practices/exit strategies	WWTAB (Lead)	April - November 2009	Top 20 at risk occupations will be identified
Proposed Actions	Proposed Partners	Timelines	Expected Results/Outcomes
Development and promotion of Technology programs for older workers			



An aging workforce
requires preparation
for succession planning

Challenges/Opportunities: Rural/Urban Disparities

- A lack of management and/or leadership skills within the rural communities is affecting the ability of both employers and communities/community organizations to recruit from within their own communities
- Employers are finding it difficult to attract and retain qualified employees which is affecting their ability to expand and offer additional employment opportunities
- The challenge for people and families to be supported by the revenue generated by the farm makes it difficult for young people to justify a farming career

Actions Since Last Report:

- Guelph Volunteer Centre has received funding to run leadership program – June 2008.
- Centre for Rural Leadership has received funding to support a Steps to Leadership program – June 2008
- Buy Local! Buy Fresh! Campaign launched in Wellington County. Includes maps, farm tours, festivals etc.
- Rural Employment Job Fair held in May at Pike Lake. Second to be held Winter 2009
- Meeting with employers about job needs, which was tied in with the job fair and determining what skills were needed by those that were expanding

Proposed Actions	Partners	Timelines	Expected Results/Outcomes
Promotion of local job opportunities in urban centres			
Establish Rural Skills Strategy Committee	Town of Minto (Lead)		
Develop Rural Training Network	WWTAB, Town of Minto, rural chambers of commerce, SW Ontario local training boards	April 2008 - December 2010	Establishment of an interactive training network website linking employers to training opportunities. No activity to date



Employers are finding it difficult
to attract and retain
qualified employees

Appendix 1: TOP Participants

2 nd Chance Employment Counselling	Fairview Mennonite Homes	Mill Creek Motor Freight	St Mary's General Hospital
Alliance of Ontario Food Processors	Falcon Innovation Group Inc.	Ministry of Training, Colleges and Universities	Synnex Canada
Arrow Hose & Tubing Inc.	Focus Action Centre	Ministry of Training, Colleges and Universities - Apprenticeship Office	TDL Group
Global Tox	Georgian College	Naylor-Mcleod	Torchlight Services
Babcock & Wilcox	Grand River Hospital	Northern Lights	Town of Orangeville
Bird Packaging Limited	Guelph Business Enterprise Centre	Northstar Aerospace Canada	Trans-Logic Executive Search Group Ltd.
Blount Canada Ltd.	Guelph Chamber of Commerce	Ontario Ministry of Agriculture, Food & Rural Affairs	Trinity Village Care Centre
Cambridge Doctors Recruitment Task Force	Guelph General Hospital	Ontario March of Dimes	Trios College
Cambridge Memorial Hospital	Hitachi Construction Truck Manufacturing Ltd.	Ontario Works Wellington	United Way of Cambridge and North Dumfries
Canadian Labour Congress	Home Depot Canada	Pacesetter Consulting Inc.	University of Guelph
Career Action Centre	Home Hardware	Participation House	Upper Grand District School Board
Career Education Council Guelph Wellington Dufferin	Huron Heights Secondary School	Pioneer Craftsmen Ltd.	Vpi Inc.
Caessant Care	JBJ Employment Services Inc	Polycon Industries	Waterloo Catholic District School Board
Cargill Meat Solutions	Junior Achievement Guelph- Wellington	Quiet Aire	Waterloo Region District School Board
Centre Wellington Chamber of Commerce	Langs Farm Village	Project Read Literacy Network	Waterloo Regional Homes for Mental Health Inc.
Greater Kitchener Waterloo Chamber of Commerce	LaPointe-Fisher Nursing Home	Regional Municipality of Waterloo	Waterloo Wellington Local Health Integration Network (WWLHIN)
City of Cambridge	Lear Corporation	Research in Motion	WWLHIN - Health Human Resources Council
City of Guelph	Legacy 5 Consultants	Kitchener Small Business Centre	Wellington Catholic District School Board
City of Kitchener	Liberty Linehaul Inc.	Seek High Value Solutions	Wellington Healthcare Alliance
Colt Canada	Linamar Corporation	Social Planning Council of Kitchener Waterloo	Wellington Terrace
Conestoga College	Loblaws Maple Grove Distribution Centre	Social Purchasing Portal of Waterloo Region	Wilfrid Laurier University
Costco	Long Manufacturing Ltd.	Spinrite	YMCA Kitchener Waterloo
County of Dufferin	Lutherwood		
Emmanuel Village	McIntyre Group		
	McNeil Consumer Healthcare		
	Medix School		

Appendix 2: Bibliography of Resources

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