



TRENDS, OPPORTUNITIES & PRIORITIES

For the Niagara Region

September 2004



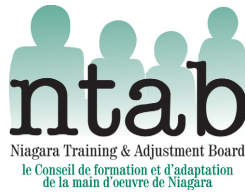
Niagara Training & Adjustment Board

le Conseil de formation et d'adaptation
de la main d'oeuvre de Niagara

Prepared by:

Niagara Training & Adjustment Board

...Niagara's Workforce Development Board



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Government of Canada or the Government of Ontario.

NTAB is one of 21 local training boards in the province of Ontario mandated by both the federal and provincial governments through their respective agencies, Human Resources & Skills Development Canada and the Ministry of Training, Colleges and Universities, to conduct and disseminate local labour market research and engage communities and community partners in a strategic planning process that leads to local solutions to local issues.

Mandate:

To identify issues pertaining to local labour force development and to forge community partnerships to address the employment/training issues.

Mission:

To facilitate community solutions related to the development and maintenance of a strong workforce in Niagara.

Vision:

That Niagara residents achieve and sustain meaningful employment



TRENDS, OPPORTUNITIES & PRIORITIES REPORT –TOP

The TOP Report is an NTAB driven, community-based report that resulted from a highly interactive process of research, community consultations, on-line surveys and interviews. The primary focus of the TOP report is to achieve clarity and understanding of the labour market trends, opportunities and priorities at the local level. It is a living document that will be updated semi-annually to reflect the emergence of new issues and the status of community driven solutions that have been identified as part of the community action plan. Future updates will be made available on the NTAB web site at www.ntab.org under NTAB Publications.

The TOP report is a key document that can be used by all community partners, key stakeholders, and government agencies in Niagara's quest to build and sustain a skilled, ready labour force to meet the workplace needs of existing and future employers.

This report provides the reader with the following information:

- Four key trends impacting Niagara's labour force/labour market
- Ten top issues (catalogued under the related trends) and the community priority assigned
- Niagara Action Plan including specific actions relative to each issue including timelines, proposed community leaders/partners and expected outcomes.



ACKNOWLEDGEMENTS

As part of its mandate and commitment to workforce development in the Niagara region, Niagara Training & Adjustment Board has been facilitating a consultative, community-based labour market research and analysis initiative over the past several months. The interactive process that was used resulted in this report—Trends, Opportunities and Priorities Report for the Niagara Region 2004.

NTAB recognizes the value and importance of participation of those that contributed to the data collection process through community consultations, interviews and surveys. Your input and continued support to NTAB and its mandate “to identify issues pertaining to local labour force development and to forge community partnerships to address the employment/training issues” serves to support the Board’s strategic approach to Niagara workforce and labour market development.

NTAB acknowledges and thanks our sponsors and our communities for their continued support and commitment.

The Board recognizes the contributions of Regional Analytics, Niagara College and Tony Sylvestre of Latis Research to this report.

NOTE:

This document has undergone a validation process by the community (as outlined in the Methodology section). NTAB acknowledges the report limitation and will continue to seek out information in areas that require further analysis and action.

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ORGANIZATION OF THE REPORT

This report is presented in four sections. The first section focuses on the research methodology practiced to achieve the end result—a TOP report that is based on qualitative and quantitative research. Section two presents the findings based on the methodologies implemented and clearly identifies the trends that have evolved through primary and secondary data analysis. This section will also identify the resulting prioritized issues for Niagara’s labour force as revealed through a quantitative analysis. The next section forms the foundation of the local area action plan developed by key stakeholders to address the issues as presented. The final section will provide general conclusions and next steps in the process of creating a skilled and ready labour force for Niagara.



INTRODUCTION

Not unlike much of Ontario, North America and indeed other industrial countries, Niagara's labour market has experienced dramatic changes over the past several decades. Aging population, increasing market competitiveness for goods and services through globalization, greater demand for a highly skilled labour force due to technological changes, population diversity, increased participation of women in the labour market, and a decline in the percentage of employment that has seen employees spend the majority of their working years with a single employer— these are just some of the significant impacts and opportunities for the changing face of the workforce and the labour market.

Niagara continues to face challenges resulting from its aging workforce along with the shift of jobs from manufacturing to the service sector. In 2003 alone, Niagara lost 9200 manufacturing jobs and since 1987 that decrease has seen close to 50,000 jobs disappear! An increase in participation of women in the workforce is certainly positive, however the point must be made that females are still earning 67.3% of income earned by males as of 2001. This speaks to the fact that women's employment continues to be concentrated in lower paying occupational clusters. Research for the Trends, Opportunities and Priorities (TOP) report also confirmed that although Niagara's labour force is better educated than it was 20 years ago, it still consistently (from 1991 to 2001) exhibits a lower level of university educated population, relative to Ontario.

This TOP report is a culmination of Statistics Canada census data, secondary data, locally conducted labour market survey and issue prioritization, community consultations and interviews. It will provide key stakeholders with valuable information on issues of priority for labour force development. As importantly, the document includes community actions that have been identified as contributing solutions to address this growing barrier to Niagara's economic growth.



REPORT METHODOLOGY

A significant emphasis was placed on community involvement in the validation and prioritization of the labour market issues that resulted from analysis of the:

- ▶ Statistics Canada Customized Census 2001 data tables for the Niagara area
- ▶ Profile of the Labour Market in the Niagara Training and Adjustment Board Area
- ▶ Interpretative Condensation of the Profile of the Labour Market
- ▶ Secondary Data Review of related reports and newspaper articles

A total of ten key labour market issues relevant to the Niagara Region resulted and were presented to the community for validation, prioritization and solution identification.

Consultation Activities:

COMMUNITY FORUM—JANUARY 28, 2004

Discussions were directed to four key areas which were representative of the issues identified in the last completed Environmental Scan (2002):

- ▶ Special Needs Population
- ▶ Labour Shortages/Skills Shortages
- ▶ Education and Training
- ▶ Youth Training and Employment

The 40 issues which resulted from this exercise were then narrowed down to the top 8 priorities by the approximately 70 participants in attendance.

Secondary Data Review:

A review of related reports and articles which demonstrated an identified link to labour market/work force development was carried out. This research provided a broader knowledge and understanding of what is already known and it further solidified and validated the issues that have resulted through the TOP process. Reference will be made to the source and dates wherever these resources are referenced. A complete copy of all referenced material is available at NTAB.

Survey of Community Sector and Labour Market Partners

Following a review of the 2001 Census Data and the “Profile of the Labour Market in Niagara”, the issues identified at the Community Forum were cross-referenced to identify any statistical relationship. These issues and trends then formed the foundation for an on-line Niagara Labour Market Trends, Opportunities and Priorities Survey that was distributed electronically to 650 contacts representing government, employers, community agencies,

economic development, health, tourism, agriculture, manufacturing, entrepreneurs, women, francophone, persons with disabilities, visible minorities and educators within the Niagara region.

The survey was live for three weeks and provided participants with the opportunity to review four key trends and ten resulting issues that evolved from the data analysis. Participants were asked to complete the survey resulting in:

- ▶ A prioritization of the issues presented
- ▶ Identification of any additional issues (in their opinion) that needed addressing
- ▶ Identification of any actions that were currently ongoing to address the identified issues

Of the 650 contacts who received the survey, a total of 155 responses were received, resulting in a 24% response rate. A total of 127 respondents identified their representative groups:

- ▶ Labour/Union 1.6%
- ▶ Business/Employers 5.5%
- ▶ Community Agency 37%
- ▶ Education/Training 29.9%
- ▶ Government 15.7%
- ▶ Other 10.2%*

* 10.2% of the "other" category was representative of Business/Employers, Education/Training, Labour/Union, Community Agency and Researcher. Excluding Researcher, the remaining categories under "other" would result in an increase in the % of participation of all categories stated in the survey.

Community Consultations – August 24, 2004 and August 31, 2004

Two community consultations were held to provide opportunity for discussion on new (within the past twelve months) or potential actions that could be taken to help address the issues as prioritized through the survey. A total of thirty (30) community representatives contributed through round table discussions resulting in five (5) new actions emerging. These will be presented later in this report.

Interviews:

A total of twelve (12) personal interviews were carried out with key stakeholders representing education, municipal and employer groups. The primary focus of these interviews was to create another opportunity to gain additional insight into the challenges, barriers, trends and opportunities that exist beyond those identified through the above noted research methods. The information collected was then content analyzed and have been incorporated into this report.



LABOUR MARKET TRENDS

Niagara specific trends have been captured below followed by a detailed analysis to further articulate resulting labour market issues.

Continued transfer of jobs to the services sector

Although Niagara's largest employer by industry continues to be manufacturing accounting for over 1 of every 6 jobs, Niagara's services sector has evolved as a major economic driver employing 75% of Niagara's workforce and accounting for more than 60% of the region's gross domestic product (GDP)¹. Based on the 2001 Census data, following manufacturing in the top four largest employers by industry is Retail Trade with 12%, Health Care and Social Services and Accommodations and Food Services both with 9% and Educational Services with 6%. The services sector (which represents such clusters as trade, transportation and warehousing, finance, insurance, real estate, educational services, health and social assistance, accommodations and food services) is characterized by extremes in relation to income and job rewards, in comparison to the good-producing sectors (including such clusters as manufacturing, construction, agriculture).

Compared to June 2002 to 2003, Accommodations and Food Services, Manufacturing and Information, and Culture & Recreation actually experienced major decreases from June 2003 to June 2004. The increase in employment (+2100) was seen in Finance, Insurance, Real Estate and Leasing. Other significant increases were seen in the Professional Scientific and Technical Services (+1200) and Public Administration (+1200) sectors.²

Resulting Issues, Community Priority Rating (with 10 being lowest)

- ▶ Jobs opportunities in various services sector clusters (eg. Accommodations and Food Services) are not being considered as viable employment due to perception of low-pay, seasonal, low-skill jobs opportunities. This is resulting in a shortage of applicants across these clusters. **9**
- ▶ Services sector training programs are under-utilized. This is resulting in a disparity between the levels of skills required by employers and the actual skill levels of the labour pool. **10**
- ▶ Over the past decade, Health Care and Social Services (including Nursing and Residential Care Facilities) has emerged as one of the top three services sectors (9% of all employment in Niagara). However, professional occupations in health experienced a 9.4% increased share of workers in the 45 years and older cohort, threatening a continued shortage of skilled professionals in all aspects of health care. **5**

1 Interpretive Condensation of the Profile of the Niagara Labour Market, Niagara College 2004

2 Human Resources & Skills Development Canada: Labour Force Activity, June 2003–2004

- ▶ The largest employer in Niagara in 2001 was “Manufacturing” even though it had already experienced a decline to 17% of Niagara’s labour force in 2001 from 22% in 1991. Manufacturing continues to extend its downward trend in job losses into 2004 with an additional 9200 jobs being lost over the past year. This raises concerns about the region’s ability to deal with major changes such as plant closures. 2

Increased age of the labour force

The aging population of the Niagara region, combined with the aging of the employed labour force creates possible implications for labour supply in the Region. Between 1991 and 2001, 21 out of 26 occupation clusters experienced an increase in the number of workers aged 55 years and older; 19 out of 26 occupational clusters exhibit a larger share of workers aged 45 years and older. As well, the majority of occupations (19 out of 26) in Niagara exhibit a smaller share of workers aged 25-44 than is the case provincially. Based on the Census of Population, Niagara population increased from 398,510 in 1996 to 404,590 in 2001 (1.5% growth) with females representing 51% compared to males at 49%.

When compared to Ontario, the age structure of the Niagara population shows that Niagara is:

- ▶ Less concentrated in all age categories between the ages of 0 to 49
- ▶ More concentrated in all age categories above 50 years of age

Most significant, the age group greater than or equal to 65 years saw a growth of 8.5%, ages 45-64 experienced a 12.3% growth, while the 25-44 age group declined 18%. To break this down even further, ages 25-29 experienced a 26.3% decline and those aged 0-4 saw a 17.5% decrease in population. Thus those cohorts experiencing the largest population increases were among the older categories. These larger decreases and small increases in the younger cohorts when compared to Ontario suggest that Niagara is aging more rapidly than Ontario.³

Some of Niagara’s younger occupations are found within the following occupational clusters:

- ▶ Technical and Skilled Occupations in Health
- ▶ Assisting Occupations in Support of Health Services
- ▶ Skilled Sales and Service Occupations
- ▶ Trades Helpers, Construction Labourers and Related Occupations
- ▶ Skilled Occupations in Primary Industry
- ▶ Intermediate Occupations in Primary Industry

Resulting Issues, Community Priority Rating (with 10 being lowest)

- ▶ The impact of downsizing and plant closures is resulting in an increase in the need for transitional supports and programs developed specifically for the older worker. **3**
- ▶ There is a need to create a process to maximize the utilization of available skills within such labour force groups as youth, women, persons with disabilities, foreign trained professionals, resulting in the increase of an available skilled labour pool. **1**
- ▶ Employer recognition of their role in the transfer of experiential skills and knowledge between experienced workers and new entrants to the occupation will result in an increase in efficiency and effectiveness of the workplace and create a best practices model for recruitment. **4**

Increased participation of women in the workforce

Women's employment continues to be concentrated (and over-represented) in four occupational clusters (Intermediate and Elemental Sales and Services Occupations, Clerical Occupations and Skilled Administrative and Business Occupations), and significantly under-represented in non-traditional clusters.

Across all occupation clusters, earned income for females averaged 67.3% of earned income for males in 2001. As a point of interest, it should be noted that the largest difference in income levels is represented in "Professional Occupations in Health" with Females incomes at 46.6% of Male income and "Labourers in Primary Industry" with Females at 50.8% of Males income levels. Where Female incomes are the highest relative to Male incomes fall in the "Professional Occupations in Arts and Culture" category at 90.8%, followed by "Technical and Skilled Occupations in Art, Culture, Recreation and Sport" at 88.8%.

Resulting Issues, Community Priority Rating (with 10 being lowest)

- ▶ There is a need to address the specific training & labour market needs of women including promoting education and training in non-traditional employment which could work to address differences in income between males and females as well as address skills shortages in specific areas in the labour market. **7**

Niagara educational attainment less than Ontario

Niagara's labour force is better educated than it was twenty (20) or even (10) years ago, with the percentage of the workforce possessing university degrees rising from 13.8% in 1976 to 18% in 2001. Relative to Ontario however, Niagara has consistently (from 1991 to 2001) exhibited a lower level of university educated labour and the gap has continued to increase. In 2001 the share of the Niagara employed labour force reporting "University" as the highest level of educational attainment was 23.5% while the same share for Ontario was 32.5%.⁴ This gap is also reflected in Niagara's relatively high con-

centration of jobs in the following clusters (Intermediate Elemental Sales and Service Occupations, Trades and Skilled Transport and Equipment Operators, Clerical Positions).

In addition,

- ▶ Since 1991, the share of the employed labour force reporting a “Trades Certificate or Diploma’ as the highest level of education attained has decreased in Niagara as well as in Ontario;
- ▶ 17.4% of the employed labour force in Niagara reported in 2001 that the highest level of education attained was “Secondary School Graduation Certificate”, whereas the provincial share was 15%;
- ▶ However, Immigrants who immigrated to Niagara between 1996 and 2001 (43.5%) had a much higher level of education attainment than did those that immigrated between 1991 and 1996 (31%).

Resulting Issues, Community Priority Rating (with 10 being lowest)

▶ Dynamic industries tend to locate in areas that have an available labour force that meets their educational and skill level requirements. Niagara falls below the provincial level resulting in a potential barrier to attracting new and emerging industries. **8**

▶ Industries in the goods-producing sector and the more dynamic segments of the services sector have experienced the greatest technological change and reaped the greatest increase in their productivity. Productivity improvements can explain, in part, the declining demand for labour within the goods-producing sector, ex. manufacturing. As a result of the increase in technological change across occupational clusters, there is an increasing demand for higher skills by employers. **6**

When statistically compared to the other issues as presented, the top three issues remained the top three priorities.

NIAGARA STAKEHOLDERS IDENTIFY ACTIONS

The next section captures current and newly proposed initiatives that are directed to specifically address the issues prioritized throughout the TOP report. It should be noted however that the Lead and Community partners identified has been simply proposed and do not necessarily reflect the agreement or acceptance by those stakeholders. NTAB accepts the responsibility to follow up on all proposed initiative and to facilitate the creation of a partnership leading to action. Where the initiative is currently ongoing, NTAB will seek clarification on the progress and include this information in the semi-annual update to the TOP report.

ISSUE 1: LABOUR FORCE UTILIZATION

There is a need to create a process to maximize the utilization of available skills within such labour force groups as youth, women, persons with disabilities, and foreign trained professionals, resulting in the increase of an available skilled labour pool.

Priority: High

Proposed Action 1 of 4

Increase opportunities for exposure, transfer and/or development of skills & knowledge to current, new and future workforce participants through such opportunities as job shadowing, co-op placements, professional development, career awareness, coaching and in-house training.

Lead Partner: Niagara Training & Adjustment Board

Community Partners: School Boards; Niagara College; Brock University; Business Education Council of Niagara; Community Employment Support Agencies; Sector Councils; Employers

Timeline: Fall 2004/Winter 2005

Expected Outcomes:

- ▶ Increased awareness of client needs by stakeholders and employers
- ▶ Greater collaboration and cooperation among key stakeholders
- ▶ Increased awareness of regional employment opportunities
- ▶ Skills development and knowledge transfer for clients and employees

Proposed Action 2 of 4

A research of “like” areas to Niagara to identify best practices and potential models to support the creation of a process to maximize utilization of targeted labour force groups including youth, women, foreign trained professionals, francophone, visible minorities, persons with disabilities, underemployed and unemployed.

Lead Partner: Niagara Training & Adjustment Board

Community Partners: NetCorp; Niagara College; Brock University; Business Education Council of Niagara; Niagara Business Leadership Council; Municipalities; Regional Niagara

Timeline: Fall 2004 to Fall 2005

Expected Outcomes:

- ▶ Greater awareness of potential barriers, challenges and opportunities to support client base
- ▶ A report that provides best practices and a model for implementation in Niagara
- ▶ A tool box/knowledge bank of potential initiatives to maximize labour force development and opportunities

Proposed Action 3 of 4

A micro-credit lending circle for individuals who have minimum financial barriers to achieve their employment goals

Lead Partner: Not identified

Timeline: Not identified

Expected Outcomes:

- ▶ Path of least resistance for clients/citizens to access their goals

Proposed Action 4 of 4

Design, research, and prepare a Human Resource Development initiative that involves the evaluation and implementation of strategies and models for Niagara to assist with new-comer employment.

Lead Partner: Region of Niagara

Community Partners: School Boards; Niagara College; Brock University; Business Education Council of Niagara; Community Employment Support Agencies; Multicultural Centres; NTAB; Niagara Business Leadership Council

Timeline: Spring 2004/Winter 2005

Expected Outcomes:

- ▶ Increased awareness of client needs by stakeholders and employers
- ▶ Identification of best practices and features that support client group
- ▶ Greater collaboration and cooperation among key stakeholders
- ▶ Increased awareness of regional employment opportunities
- ▶ Skills development and knowledge transfer for clients and employees

ISSUE 2 & 3: LABOUR FORCE/MARKET ADJUSTMENT

The largest employer in Niagara in 2001 was “Manufacturing” even though it had already experienced a decline to 17% of Niagara’s labour force in 2001 from 22% in 1991. Manufacturing continues to extend its downward trend in job losses into 2004 with an additional 9200 jobs being lost over the past year. This raises concerns about the region’s ability to deal with major changes caused by change in industry downsizing. Such closures also increase the need for transitional programs for the older worker population impacted by such changes.

Priority: High

Proposed Action 1 of 2

Develop a community-based strategy for workforce and community development resulting in a template that can be then utilized as a model for other communities facing significant increases in displacement of the workforce.

Lead Partner: NetCorp

Community Partners: HRSDC; NTAB; Niagara College; Employment Support Agencies; Multicultural Centres; Brock University; City of Welland; Region of Niagara

Timeline: Spring/Fall, 2004

Expected Outcomes:

- ▶ Strategic development plan for community and workforce development
- ▶ Template for utilization in other areas of the region
- ▶ Greater understanding of the community/regional labour force profile

Proposed Action 2 of 2

Create a regional economic development plan that identifies existing and future economic clusters that can contribute to an increase in versatility of the region’s economic base and create employment opportunities which offer attractive wages and benefits.

Lead Partner: Municipalities; Region of Niagara;

Community Partners: NTAB; Business Enterprise Centers, Brock University; Niagara College; Sector representatives; Union representatives

ISSUE 2 & 3

Timeline: 2004–05

Expected Outcomes:

- ▶ Increased regional collaboration
- ▶ Regional Economic Development Plan
- ▶ Retention of youth and skilled labour pool
- ▶ Identification of “sector clusters” for further or new economic growth

ISSUE 4: SKILLS AND KNOWLEDGE TRANSFER

Employer recognition of their role in the transfer of experiential skills and knowledge between experienced workers and new entrants to the occupation will result in an increase in efficiency and effectiveness of the workplace and create a best practices model for recruitment.

Priority: Medium

Proposed Action 1 of 4

Survey hiring practices of employers in Niagara region—JCP, one-to-one interviews; Analyze findings, create report and present to employers

Lead Partner: Niagara Training & Adjustment Board

Community Partners: Brock University; Employment Agencies; Chambers of Commerce; Unions; Business Education Council of Niagara; Niagara College

Timeline: 2005-06

Expected Outcomes:

- ▶ Identify current hiring practices in business and industry in Niagara
- ▶ Create a list of Ambassadors/Champions and promote successes
- ▶ Create a “Best Practices” handbook for employers
- ▶ Identify possible need to develop employer supports

Proposed Action 2 of 4

Develop programs and/or services to support adult literacy and Prior Learning Assessment and Recognition

Lead Partner: Niagara Training & Adjustment Board

Community Partners: Employers; School Boards; MTCU; Brock University; Niagara College; Unions; Business Consultants; Literacy Link Niagara; Ministry of Education

Timelines: 2004-2008

Expected Outcomes:

- ▶ Increased awareness of adult literacy and PLAR among employers
- ▶ Identification of what services and supports currently exist
- ▶ Promotion of PLAR as a business practice among employers
- ▶ Model employers

Proposed Action 3 of 4

Employer Recognition campaign including the sharing of success stories to promote best practices for recruitment, knowledge transfer and retention

Lead Partner: Niagara Training & Adjustment Board

Community Partners: Employers (targeted); Education/Training; related Ministries; Unions; Labour Force/Market Development Agencies/Groups

Timeline: 2004-05 and continuing

Expected Outcomes:

- ▶ Identification of employer “best practices”
- ▶ Promotion of recruitment and retention strategies

Proposed Action 4 of 4

Regional Apprenticeship Strategic Planning Session for Southwestern Ontario with a focus on information sharing and best practices of local strategies for employer involvement in apprenticeship.

Lead Partner: Niagara Training & Adjustment Board

Community Partners: Southwestern Ontario Local Training Boards; Training/ Post-secondary Institutions; related Ministries; Job Connect; Employment Support Agencies; School Boards

Timelines: Fall 2004

Expected Outcomes:

- ▶ An established network for information sharing among key stakeholders and service providers for apprenticeship related services/supports
- ▶ Identification of community “best practices”
- ▶ Identification of strategies for employer involvement in apprenticeship

ISSUE 5: HEALTH CARE SKILLS SHORTAGE

Over the past decade, Health Care and Social Services (including Nursing and Residential Care Facilities) has emerged as one of the top three services sectors (9% of all employment in Niagara). However, professional occupations in health experienced a 9.4% increased share of workers in the 45 years and older cohort, threatening a continued shortage of skilled professionals in all aspects of health care.

Priority: Medium

Proposed Action 1 of 3

Support foreign trained nurse participation in refresher training, making it easier to obtain their license in this province.

Lead Partner: Niagara Health System

Community Partners: Education Institutions; Hotel Dieu; Lincoln Memorial Hospital; Niagara District Health Council

Timeline: 2004–and ongoing

Expected Outcomes:

- ▶ Increase in nurses to work in the health system
- ▶ Utilization of skilled labour force in their field of study

Proposed Action 2 of 3

Support RPN's to upgrade to RN's and remain in the health care system.

Lead Partner: Niagara Health System

Community Partners: Education Institutions; Hotel Dieu; Lincoln Memorial Hospital; Niagara District Health Council

Timeline: 2003–2004

Expected Outcomes:

- ▶ Create opportunity for advancement of participants from RPN to RN
- ▶ Increase in skilled labour pool to fill vacancies for RN's in Niagara

ISSUE 5

Proposed Action 3 of 3

Create a network with local employers and training/post-secondary institutions offering health-related training programs to establish opportunities for rotations, training access, co-op placements, etc.

Lead Partner: Niagara Training & Adjustment Board

Community Partners: MTCU; MED; Niagara College, Brock University; Health Sector; employers; Niagara District Health Council

Timeline: 2004–2006

Expected Outcomes:

- ▶ Increased exposure of Niagara to a potential labour pool
- ▶ Increased exposure of Niagara health sector to skilled labour pool
- ▶ Increased access to training opportunities and professional development

ISSUE 6 & 8: DEMAND FOR HIGHER SKILLS/EDUCATION

Industries in the goods-producing sector and the more dynamic segments of the services sector have experienced the greatest technological change and reaped the greatest increase in their productivity. Productivity improvements can explain, in part, the declining demand for labour within the goods-producing sector, ex. manufacturing. As a result of the increase in technological change across occupational clusters, there is an increasing demand for higher skills by employers.

Dynamic industries tend to locate in areas that have an available labour force that meets their educational and skill level requirements. Niagara falls below the provincial level resulting in a potential barrier to attracting new and emerging industries.

Priority: Medium/Low

Proposed Action: No specific action identified at this time

Lead Partner:

Community Partners:

Timeline:

Expected Outcomes:

ISSUE 7: TRAINING AND LABOUR MARKET NEEDS OF WOMEN

There is a need to address the specific training & labour market needs of women including promoting education and training in non-traditional employment which could work to address differences in income between males and females as well as address skills shortages in specific areas in the labour market

Priority: Medium

Proposed Action 1 of 1:

Carry out workshops/training programs specific to women to increase awareness of labour market trends, career pathways, and employment readiness.

Lead Partner: Not identified

Community Partners: Community Agencies; NTAB

Timeline: Fall 2004 and ongoing

Expected Outcomes:

- ▶ Increased awareness of labour market information/opportunities by participants
- ▶ A direct connection for participants to local employment support agencies
- ▶ Participants will have access to information to assist in the job search/job readiness process

ISSUE 9 & 10: SERVICE SECTOR SUPPLY AND DEMAND

Jobs opportunities in various services sector clusters (eg. Accommodations and Food Services) are not being considered as viable employment due to perception of low-pay, seasonal, low-skill jobs opportunities. This is resulting in a shortage of applicants across these clusters.

Services sector training programs are under-utilized. This is resulting in a disparity between the levels of skills required by employers and the actual skill levels of the labour pool.

Priority: Low

Proposed Action 1 of 1:

Identification & implementation of career awareness strategies/events/resource tools to promote careers in Hospitality & Tourism sectors

Lead Partner: Niagara Training & Adjustment Board

Community Partners: Niagara Tourism Human Resources Council; Ontario Tourism Education Corporation; Canadian Tourism Human Resources Council; Niagara College; District School Board of Niagara; Niagara Catholic District School Board; related Employers; Business Education Council of Niagara

Timeline: Winter, 2005

Expected Outcomes:

- ▶ Increased awareness of available careers in tourism/hospitality sector
- ▶ Better understanding of the education requirements and program availability for career pathways related to tourism/hospitality
- ▶ Awareness of regional employment opportunities
- ▶ Communication channel between educators and employers established



TRANSPORTATION: OVERRIDING ISSUE FOR NIAGARA

As identified in the previous Environmental Scan released in 2002, the challenge of transportation still remains a key priority among job seekers, Niagara residents and employment support agencies, to name a few. Through the on-line survey, this issue was raised by approximately 19 individuals as a key barrier to employment success. During community consultations, the issue was raised time and time again. Candidates are available for both jobs and employment training programs but the challenge remains on how they can get from point A to point B.

Some of the discussions called for greater collaboration among community employment support agencies—call for additional funding to ensure clients can access the training available. However, the challenge goes beyond accessing the training—once trained and hired, these new employees now need to be able to get to and from the workplace. The call for an increased emphasis among each municipality and a collaborative approach which incorporates all those service and support agencies who work directly with the client base was a key message among the participants.

The groups were not just focused on the discussion of the transportation problem but also placed considerable emphasis on the importance of identifying possible solutions. The following are just a few of the ideas which were presented during a short brainstorming exercise on this critical issue.

- ▶ Car pooling via the Internet to match drivers and passengers
- ▶ Taxi service for matching round trips with different passengers
- ▶ Employers should be canvassed to pool resources and provide transportation around Niagara
- ▶ Formation of a community-based committee to be part of the solution development



NEXT STEPS

A plan of action has been formulated through the TOP process. Identification of other activities and initiatives ongoing or emerging will remain a key priority for the Niagara Training & Adjustment Board over the next year. Awareness of what is happening serves to encourage and promote increased collaboration and partnership and to reduce duplication. Recognizing that human and financial resources are precious commodities only reaffirms the necessity and value in partnerships. Niagara stakeholders are to be commended for their pro-active approach and support to partnerships as demonstrated in the actions identified in this report.

The NTAB will be focusing on the results of this report as a key resource in its strategic planning process. Community outreach, consultations, and formations of working committees will be initiated as the proposed actions are pursued and turned into real actions driven by a community that is determined to create a stronger economic base supported by a skilled, ready labour force.

In addition, the results of this research will be cross-tabulated with that conducted through the local board network across the province to identify any similarities in labour force and labour market issues. This is an important step in the process as it serves to draw attention to the vastness (or lack thereof) of key social and economic indicators that tend to influence future policy, political decisions and directions.

This report does not reveal anything that is new. Instead it focuses on presenting a set of clearly articulated issues that require a collaborative and cooperative approach. The true measure of this report is in the action that it generates.

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LISTING OF PARTICIPATING AGENCIES/COMMUNITY STAKEHOLDERS

- | | | |
|---|--|--|
| <ul style="list-style-type: none"> AAP Adult Learning & Resource Centres Niagara West Avalon Consulting & Associates Bethlehem Projects of Niagara Bujold Colburn Employee Benefits Business Education Council of Niagara Canadian Union of Skilled Workers CAIPS CAW Skilled Trades Council Centre for Community Leadership City of St. Catharines City of Fort Erie City of Niagara Falls City of Welland Club 2000 Niagara Inc CMHA Niagara Community Living Port Colborne/ Wainfleet Community Living Welland/Pelham CUPE District School Board of Niagara Dunk & Associates EB Marketing Economic Development – City of St. Catharines EDTS City of St. Catharines Elisabeth Biers Marketing Employment Help Centre – St. Catharines | <ul style="list-style-type: none"> Employment Help Centre – Welland Farm Labour Pool Niagara Folk Arts Council Human Resources Skills Dev. Canada I CAN-T.E.R. Information Niagara Inward Training Job Gym/John Howard Society of Niagara King's Court Estate Winery Knowledgebrokers Inc. Latis Research Learning Potentials Management Development Centre - Brock University Min. of Economic Dev. & Trade Ministry of Training, Colleges and Universities MITCHELL RESEARCH MTCU/AAP Niagara Business Leadership Council Niagara Catholic District School Board Niagara Centre for Independent Living (Work Link) Niagara College – Job Connect Niagara College – Maid of the Mist Campus Niagara College Job Centre Niagara District Health Council Niagara Economic & Tourism Corporation Niagara Employment Alliance | <ul style="list-style-type: none"> Niagara Employment Help Centre Niagara Health System Niagara Region Sexual Assault Centre Niagara Tourism HR Council – Niagara College Ontario Disability Support Program Ontario March of Dimes (South) Ontario Ministry of Tourism & Recreation pcTech-Aid Print Three R. & H. Lawson Eventide Home R.E.A.L Work/CMHA Region of Niagara – Community Services Department Region of Niagara/Planning Seaway Mall Shalom Manor Home for the Aged The Burke Group The Herrington Group Ltd The Institute for Enterprise Education Thorold Community Activities Group Town Of Grimsby Victorian Order of Nurses Niagara West Lincoln Memorial Hospital Women's Resource Centre YMCA of Niagara YWCA of St. Catharines |
|---|--|--|

LABOUR FORCE ACTIVITY

St. Catharines – Niagara Census Metropolitan Area (CMA)

June 2003 – June 2004

Labour Force Trends

The change in labour force activity between June 2003 and June 2004 saw a decline in all aspects of the labour market. Over 10,000 people lost employment with the majority leaving the labour force altogether (-7,400). The others (-2,800) who remained in the labour force became unemployed. Full-time and part-time employment were affected virtually the same with a decline of just over - 5%. The participation rate was down from 64.3% in 2003 to 61.8% in 2004 while the unemployment rate rose from 6.5% to 8.2%. The unemployment rate is higher than both the provincial and national average of 6.9% and 7.2% respectively. Labour Force Activity continues to peak in September when there were 217,700 (slightly higher than the previous September) in the labour force and a 66.8% employment rate. Throughout the year, the 3-month moving average unadjusted unemployment rate was anywhere from a high of 9.1% in March 2004 to a low of 6.1% in September 2003.

St. Catharines–Niagara is not alone. Other areas such as Thunder Bay and London have had larger increases in the unemployment rate from the same time last year. In June 2004, St. Catharines–Niagara was ranked as 8th out of the 25 CMAs in Canada with an unemployment rate of 8.2%. Saguenay, Quebec had the highest with 10.9% while the lowest was found in Edmonton, Alberta with 4.3%.

Labour Force Trends St. Catharines-Niagara CMA

Labour Force Characteristics	June 2004	June 2003	Absolute Change	% Changed
Population 15yrs +	326,900	325,400	1,500	0.5
Labour force	201,900	209,300	-7,400	-3.5
Employed	185,500	195,600	-10,100	-5.2
Full-time	147,400	155,300	-7,900	-5.1
Part-time	38,100	40,300	-2,200	-5.5
Unemployed	16,500	13,700	2,800	20.4
Not in labour force	124,900	116,100	8,800	7.6
Participation rate %	61.8	64.3	-2.5	
Unemployment rate %	8.2	6.5	1.7	
Employment rate %	56.7	60.1	-3.4	

Source: Statistics Canada Labour Force Survey

Employed Labour Force by Industry

Contrary to June 2002 to June 2003 where the largest employment increases were in Accommodation and Food Services, Manufacturing and Information, Culture and Recreation, June 2003 to June 2004 saw all three of these industries with major decreases.

Most of the decline in employment year-over-year came from losses in the Manufacturing sector (-8,500). While employment in Manufacturing has remained relatively flat over the past six months, it showed a steady decline through the second half of 2003. Manufacturing has lost over 50% of its workforce since August 1987 when there were 51,500 people employed in that industry. Declines were also seen in Transportation & Warehousing (-2,200), Accommodation and Food services (-2,100) and Information, Culture and Recreation (-1,700). While they all peaked in the fall of 2003 they all also began their descent at that time. Transportation & Warehousing continued its decline right into June 2004 while the other two started to rise in alignment with seasonal trends.

An increase was seen in Finance, Insurance, Real Estate and Leasing of +2,100. Employment has almost doubled in this sector since the beginning of 2003 when there were 6,100 people employed. There are now 11,700. Other significant increases were seen in the Professional Scientific and Technical services (+1,200) and the Public Administration (+1,200) sectors.

Employment by Industry St. Catharines–Niagara CMA

Industry–(NAICS)	June 2004	June 2003	Absolute Change	% change
All Industries	185,500	195,600	-10,100	-5.2
Goods-Producing Sector	42,100	48,200	-6,100	-12.7
Agriculture	3,300	3,200	100	3.1
Forestry, Fishing, Mining, Oil and Gas
Utilities	1,600
Construction	12,400	11,700	700	6.0
Manufacturing	24,200	32,700	-8,500	-26.0
Services-Producing Sector	143,400	147,300	-3,900	-2.6
Trade	27,500	27,700	-200	-0.7
Transportation and Warehousing	7,100	9,300	-2,200	-23.7
Finance, Insurance, Real Estate and Leasing	11,700	9,600	2,100	21.9
Professional, Scientific and Technical Services	8,100	6,900	1,200	17.4
Management, Administrative and Other Support	9,400	10,100	-700	-6.9
Educational Services	13,400	14,800	-1,400	-9.5
Health Care and Social Assistance	19,100	19,000	100	0.5
Information, Culture and Recreation	13,700	15,400	-1,700	-11.0
Accommodation and Food services	19,600	21,700	-2,100	-9.7
Other services	6,000	6,300	-300	-4.8
Public Administration	7,800	6,600	1,200	18.2

Note: "..." indicates that data are too small to be expressed and are not appropriate for release. Totals may not add due to rounding.

Source: Statistics Canada Labour Force Survey

Provided by: Carol Dupuis, Labour Market Information Analyst, HRSDC, Niagara Area

1 Source: Statistics Canada: Community Benchmarks

2 Source: Statistics Canada Labour Force Survey: Human Resources & Skills Development Canada

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REPORT FEEDBACK

The Trends, Opportunities and Priorities Report (TOP) has been produced to provide stakeholders in the Niagara region with research findings directly related to the issues impacting workforce development. It further provides recommended actions with specific measurable outcomes that create a starting point for new initiatives to address these issues and barriers. This is a new reporting process for local boards across the province and therefore it is important that we ask your opinion on the relevance and usefulness of this document. We value your input.

Please use this evaluation form to provide feedback to the Niagara Training and Adjustment Board at:
ONE ST. PAUL STREET, SUITE 605, ST. CATHARINES ON L2R 7L2
Tel: (905) 641-0801 • Fax: (905) 641-0308 • E-mail: ntab@ntab.org

▶ Did you find the Trends, Opportunities and Priorities Report 2004 helpful to your planning process (please explain)?

▶ Are the needs that were identified relevant?

▶ Are the Specific Actions, Timeframes and Expected Outcomes realistic?

▶ Do you feel the TOP Report is lacking or missing information that would be of value (please explain)?

▶ Would you like to more actively involved in local labour force development initiatives in Niagara? For example, serve on committees, receive reports and updates, serve on the NTAB Board?

▶ If yes, please provide relevant information for follow-up by our staff.

Name: _____

Organization: _____

Address: _____

Telephone: _____ Fax: _____

E-mail: _____



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