



Focus on the Future... Destination Success

Labour Market Presentation

*Niagara Training & Adjustment Board
..... Niagara's Workforce Development Board*

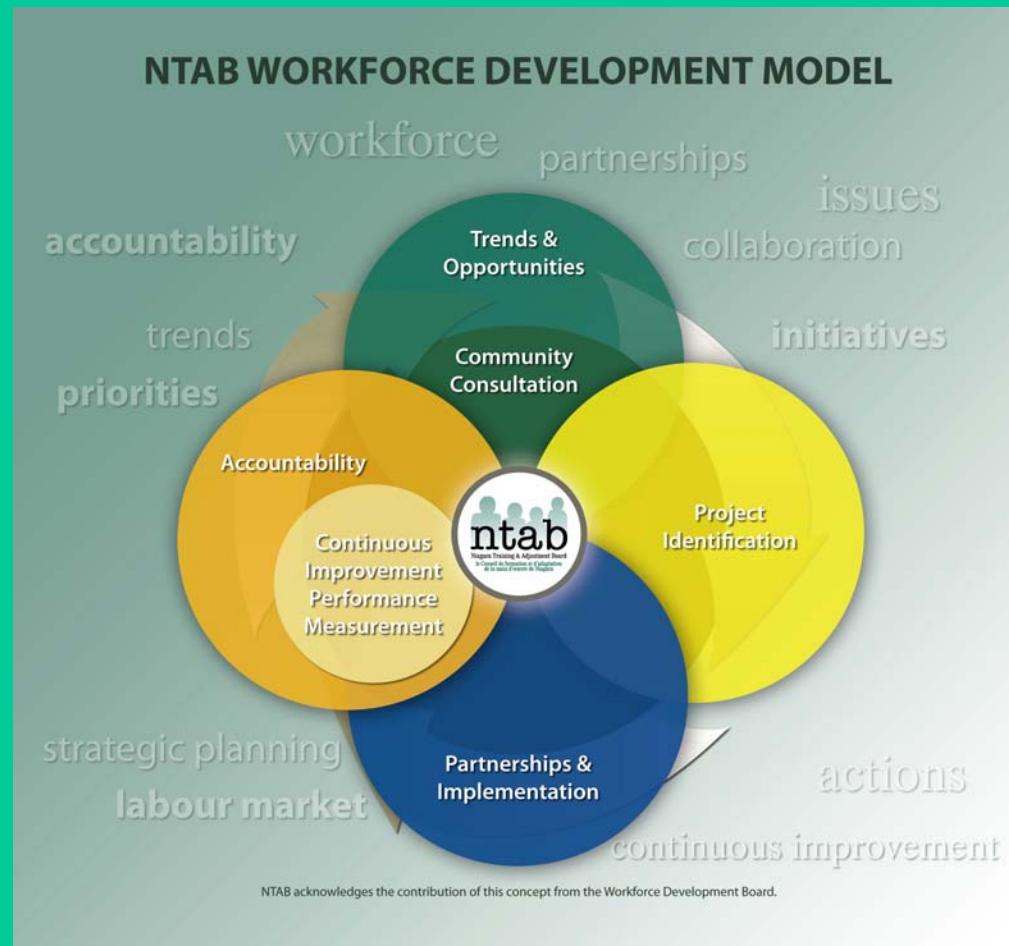
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Workforce Development Model

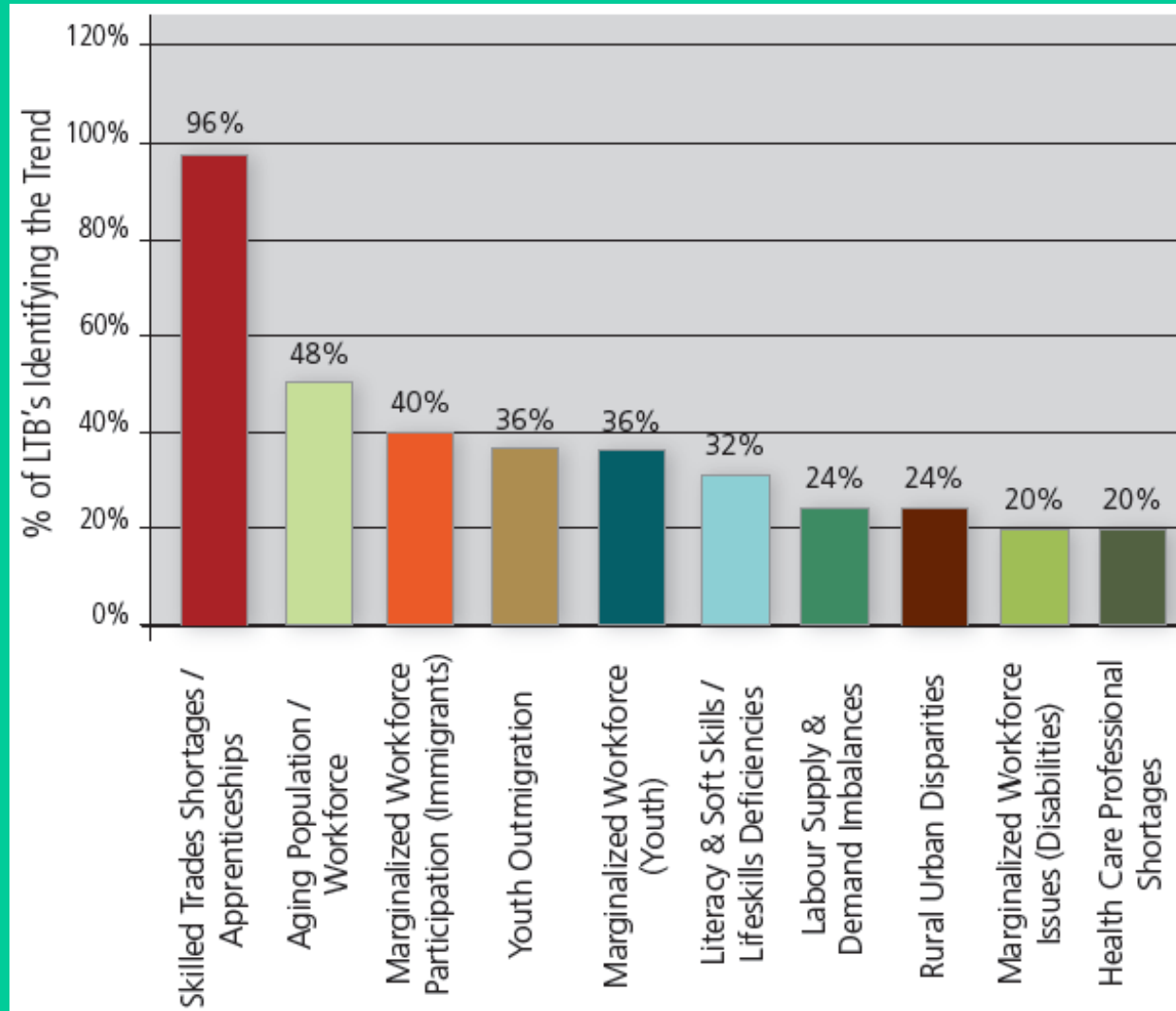


How TOP Fits - In the Big Picture

Communities cannot control external factors which affect the labour market (e.g. price of electricity, the value of the \$, immigration levels, provincial economic development strategies, etc.);



Top 10 Ontario Labour Market Trends



Local Labour Market Snapshot

- Aging Workforce
- Skills Shortage
- Integration of equity groups
- Youth Migration
- Economic restructuring
- Demand for higher skilled workers
- Population diversity
- Increased participation of women in labour force
- Lower levels of education attainment

Niagara Population Analysis 2006

- The Niagara region had a population of 427,421 in 2006. This is an increase of 16,855 people, or 4.1% growth, since 2001.
- The largest population growth within Niagara was in Niagara Falls, with an increase of 3,370 people since 2001. The smallest was in Port Colborne with 150.
- The greatest percentage growth was in Grimsby, with a 12% population growth since 2001.
- The smallest was in Port Colborne and Thorold, each with 1%
- The oldest community is Niagara on the Lake, where the median age is 49.1 and 86.2% of the population is over age 15.

Source: Statistics Canada, Census Data 1996-2006.

Prepared by Dane Rice for the Niagara Training and Adjustment Board, August 2007.

Niagara Population Analysis 2006

- The youngest community is West Lincoln, where the median age is 36.5 and 77.9% of the population is over age 15.
- Females matched or outgrew males in all but one community; Fort Erie.
- Communities with a growth in children age 0-4 were Grimsby, Niagara on the Lake, Pelham , and Welland.
- The greatest percentage growth of any single age group in a community was by those age 55-64 in West Lincoln; a growth of 39% since 2001.
- The greatest percentage loss of any single age group in a community was by those age 0-4 in Wainfleet; a loss of 15% since 2001.

Source: Statistics Canada, Census Data 1996-2006.

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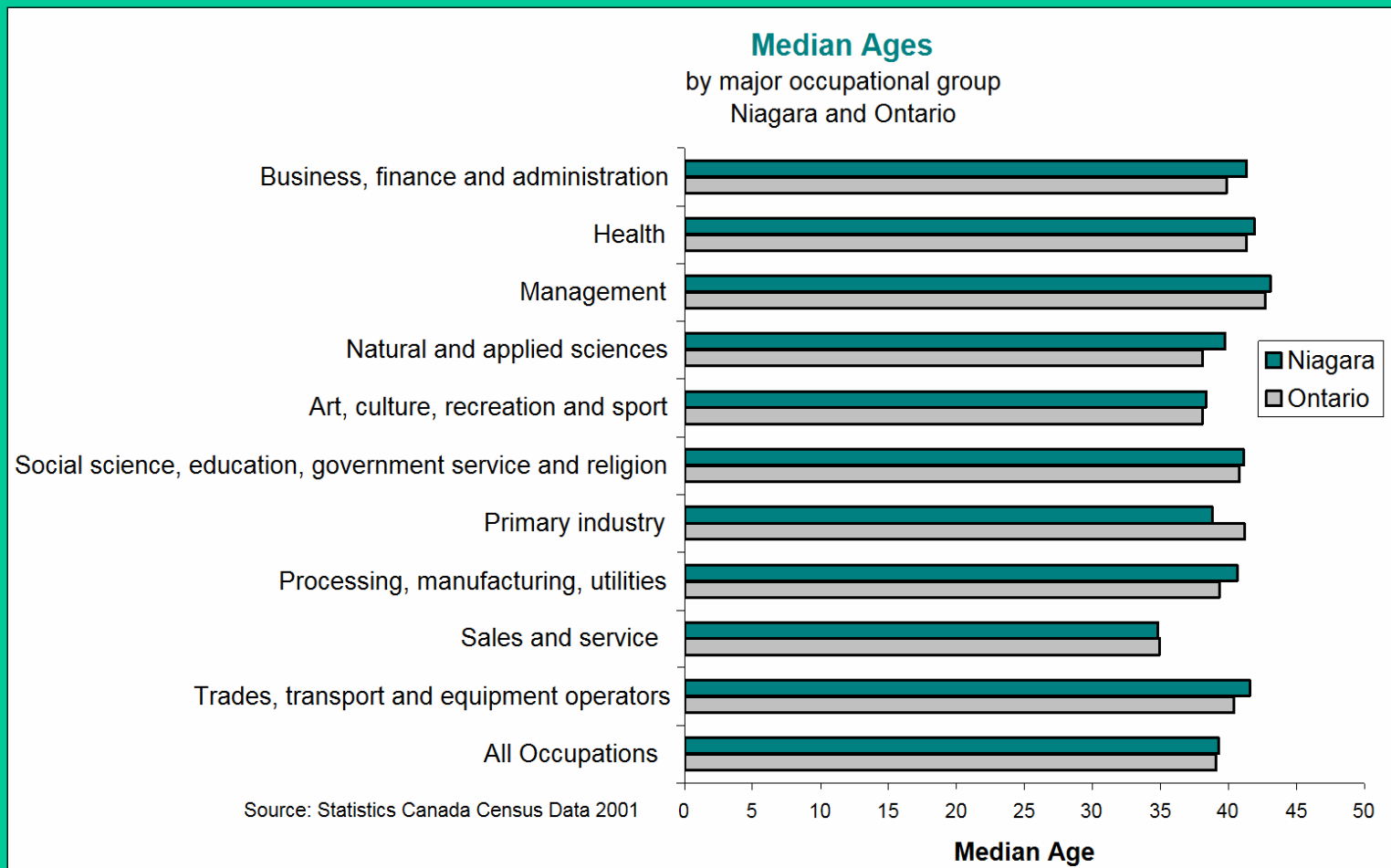
Population : Niagara Census Division

Age	≥65 yrs	45-64	25-44	15-24
2001	69,770	102,510	112,995	50,380
2006	74,175	117,955	107,565	55,750
% of change 2001-2006	+6.3%	+15%	-4.8%	+10.7%

Population Projections

2006	2011	2016	2021	2026	2031
4.1%	3.5%	2.4%	2.7%	2.8%	2.4%

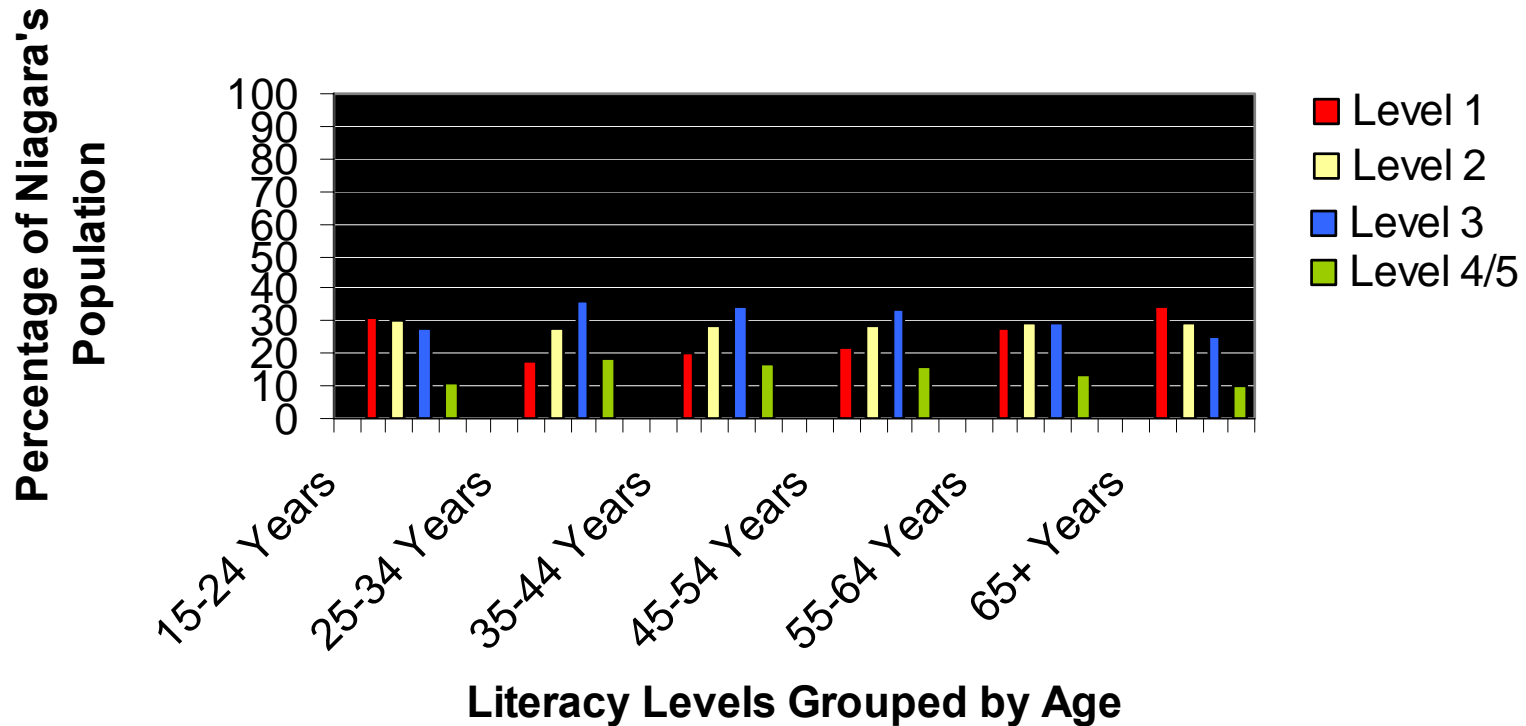
Source: 2006 Census, Stats Canada & Ontario Ministry of Finance Population Projection, Spring 2007



Niagara has an older workforce than Ontario in all occupational groups except sales and service and primary industry. Apart from management, Niagara's oldest workforce is in healthcare.

Literacy Levels by Age Group

Niagara Average Literacy Levels by Age Group



Ontario Employees Who Do Not Meet Minimum Skill Levels

- Accommodation & Food Services - 67%
- Construction - 54%
- Manufacturing - 46%
- Trade Finance, Insurance, Real Estate & Leasing - 36%
- Health Care & Social Assistance 35%

TOP Occupations (15-24)

Food counter attendants, kitchen helpers and related occupations	2895
Retail salespersons and sales clerks	2830
Cashiers	2070
Food and beverage servers	1825
Grocery clerks and store shelf stockers	1230
Cooks	1185
Nursery and greenhouse workers	835
Landscaping and grounds maintenance labourers	580
General farm workers	520
Customer service, information and related clerks	450
Light duty cleaners	410
Other elemental sales occupations	355
Material handlers	350
General office clerks	325
Service station attendants	300

Workforce Demographics - NHS

- Employees: 4,200
- Average age: 45 years
- Level of unionization: 92%
- Gender: 90% female
- Average length of service: 14 years
- HOOPP (pension plan) retirement eligibility: 55 years
- NHS employees *eligible* to retire: 20% by 31/12/07
- NHS managers *eligible* to retire: 24% by 31/12/07

Resulting Labour Market Demands Niagara Health System

- Skilled leaders
- Skilled healthcare providers
 - Nurses - specialty areas of Maternal/Child, Peri-Operative, Mental Health, Cancer, Critical Care
 - Technologists
 - Occupational Therapists, Physiotherapists
 - Pharmacists
 - Nurse Practitioners
- Service Workers - Trades

Consequences of Labour Shortages

- Approximately 300 vacancies; 130 RN vacancies now
- Up to 513 RNs, 1638 total staff by 2012 (if retire at 55); without additional staff for new or expanded programs
- Need for refined workforce planning approach to more accurately predict future needs

Construction Sector

Potential Shortages

Construction occupations with notable retirement projections, Niagara

Occupation	Percentage of workers retiring by 2011	Number of workers retiring by 2011	Average age of workforce
Construction millwrights and industrial mechanics	26%	265	45.8
Welders and related machine operators	13%	195	39.5
Steam fitters, pipe fitters and sprinkler system installers	33%	75	43.4

Source: 2001 Census Data, Statistics Canada

Transportation Equipment, Automotive and related industries sector

- 98% of workforce are permanent, full-time employees
- predominately male workforce
- 68% of employees over the age of 45
- 31% companies expect 10 - 25% retirees in the next 5 years

Labour Requirements

Transportation Equipment, Automotive
and related industries sector

- 600 new hires projected to 2007
- New hires include significant numbers of welders, production workers, mechanical engineers and machine operators
- One third will be permanent full time and another 30% will be temporary, plus part time positions and positions unspecified

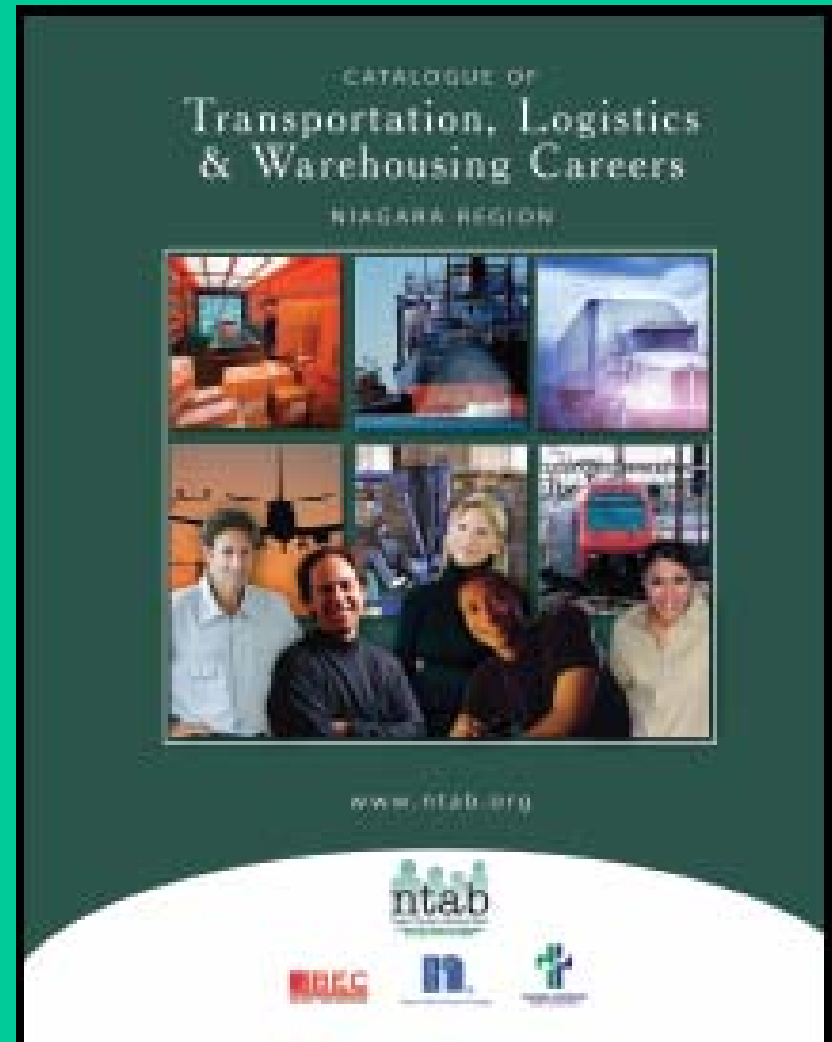
Transportation Equipment, Automotive and Related Industries Sector

- 57% difficulty sourcing qualified employees in the last 2 years
- Greatest difficulty sourcing technical/trades workers

47% reported workforce number static last 2 years

Transportation, Logistics & Warehousing Careers in Niagara

Released Dec
5/07



Labour Requirements

Tourism and Wine Sector

- 2,978 projected new hires to 2007
- New hires include significant numbers of servers, hosts, cooks, seasonal front line workers
- Mainly temporary full time and part time positions
- Substantial seasonal rehires

Tourism and Wine Sector

- 55% had difficulty sourcing service/clerical workers
- 34% had difficulty sourcing technical/trades workers
- 44% experienced increase in employees in last 2 years

Labour Requirements

Agriculture, Food and Beverage Sector

- 173 new hired in the next 3 years
- Majority are horticultural workers with high school education
- 55% permanent full time positions
- 40% difficulty sourcing qualified supervisors
- 50% same employee numbers in the past 2 years

Labour Requirements

Business, Public & Transportation Distribution Services Sector

- 600 new hires to 2007
- Majority are sales positions
- 48% full time positions

Business, Public & Transportation Distribution Services Sector

- 40% are permanent part time
- Difficulty sourcing professional and technical workers
- 43% companies have same employee numbers for 2 years

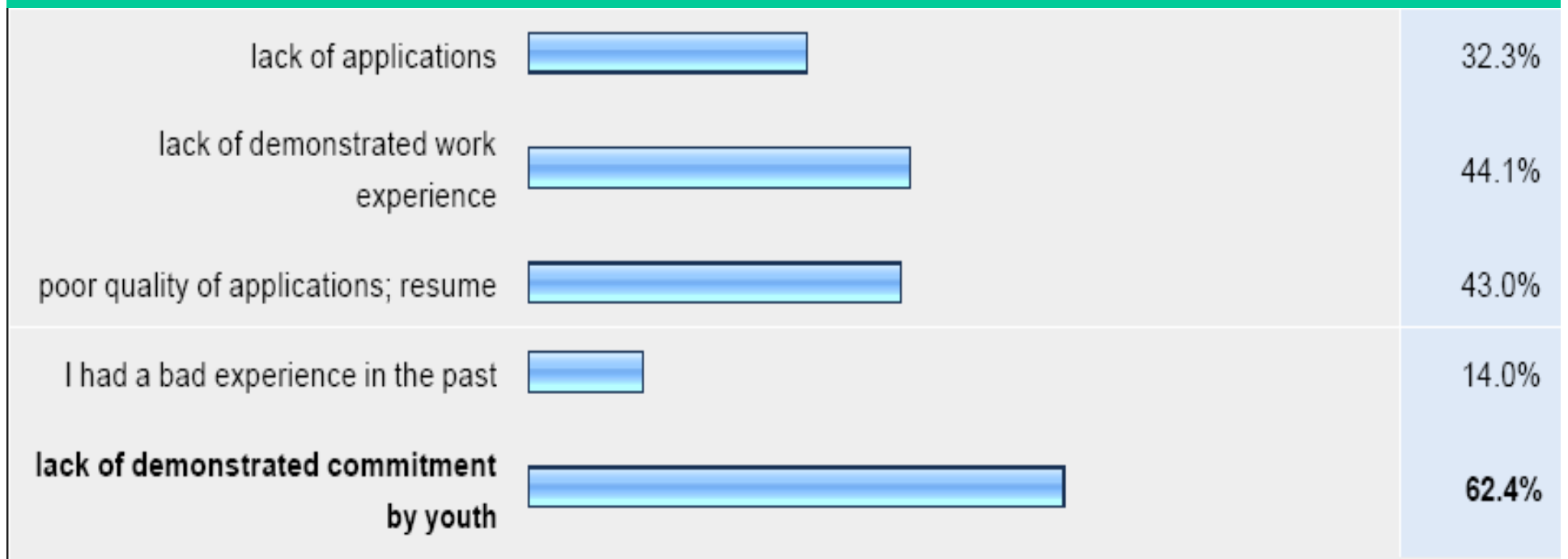
4. What percentage of your workforce is

	Response Average
Full time (30 or more hours per week)	73.42
Part time (less than 30 hours per week)	25.68
Contract	15.93
Seasonal	34.97
Other	3.17

22. Does your current workforce include employees from the following groups?

	Response Percent
Persons with disabilities	20.2%
Foreign trained professionals/skilled immigrants	21.1%
Older Workers (defined as over 50 years of age)	63.2%
Youth (29 years of age and under)	57.9%
Not in my workforce	14.0%

Barriers to hiring Youth



What Employers Want

- Previous work experience
- Positive Work Ethic
- Right skills for the job - willing to teach
- Attitude
- Volunteering - giving back to the community
- Engagement - be part of the company



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