



This survey was conducted between January 2005 and January 2006 by the Niagara Economic Development Corporation (NEDC), with funding from Service Canada (formerly Human Resources Skills Development Canada) and in partnership with the Niagara Training and Adjustment Board (NTAB).

The purpose of the survey was to obtain information to assist in creating economic development and labour market strategies to promote regional economic growth.

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Niagara Region Business & Employment Outlook

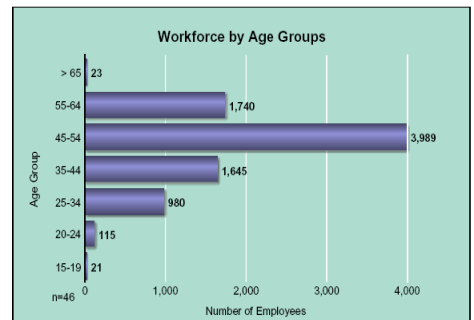
October 2006

Transportation Equipment, Automotive & Related Industries Sector

This sector represents about 46% of the Region's total manufacturing base. Market changes however, jeopardize the industry's stability and projections indicate a 6% net shrinkage annually over the next 3 years.

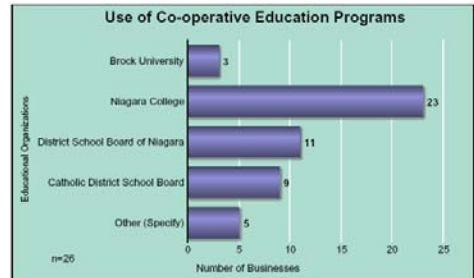
Workforce Facts:

- principally permanent full time employees
- predominantly male (88%)
- 68% over the age of 45, with 47% of the workforce between 45-54, and 21% being over 55
- over 60% occupational categories is made up of industrial workers
- skilled trades make up 21%, in line with the national average for this sector



Labour Requirements:

- approximately 600 new hires are projected over the next 3 years (2005-2007). Only 1/3 of these new hires will be permanent full time and another 30% are temporary full time, a significant increase in temporary employment relating to previous years
- fifty-seven percent of respondents had difficulty sourcing qualified employees in the last two years with the greatest difficulty in technical/trades workers across a wide range of jobs and skills



Strategies for addressing labour needs utilized by this sector include:

- over 60% are likely to attract workers from other organizations
- 75% are likely to hire young people just entering the labour market
- 68% are likely to hire immigrants with foreign training
- 61% are likely to implement new technology to reduce labour requirements
- 72% are likely to implement measures to utilize talents of underemployed workers

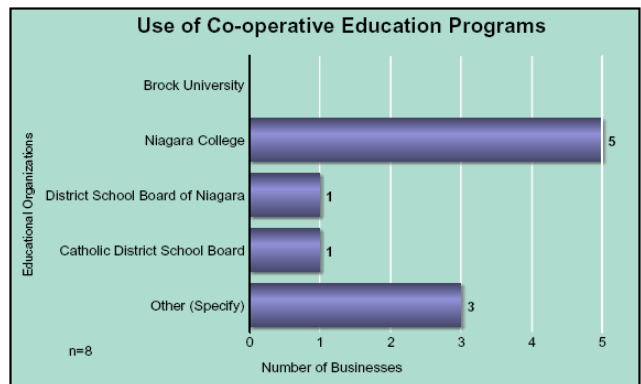
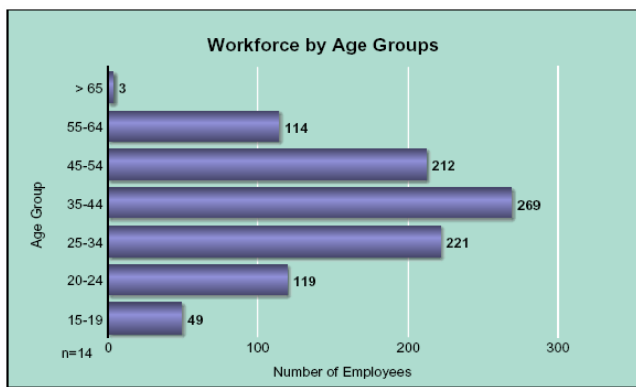


Agriculture, Food & Beverage Sector

The Agriculture, Food & Beverage sector has a major economic impact in the Niagara Region. According to Statistics Canada, the Agriculture/Horticulture/Floriculture Industry in Niagara pulls in excess of \$510 Million in gross farm receipts annually, with greenhouses contributing 42.57% of the total. The Food & Beverage industry employs approximately 3000 among 105 companies within the Niagara Region.

Workforce Facts:

- primarily comprised of permanent full-time and temporary part-time employees
- split between 57% male and 43% female workers
- 33% over the age of 45
- majority are employed as industrial workers at 58%
- 27.2% of the workforce is aged 35-44, 22.4% is 25-34, 21.5% is 45-54 years old and 12% is age 20-24. 11.9% are over 55

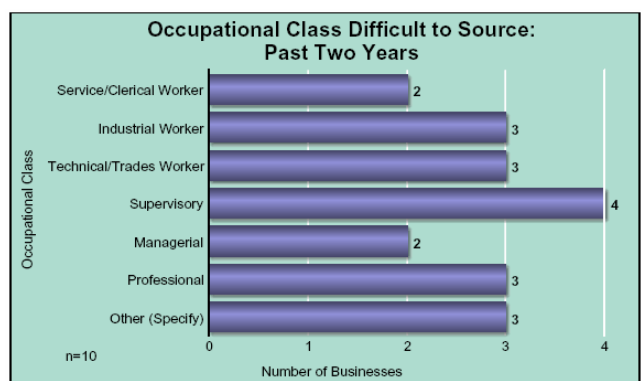
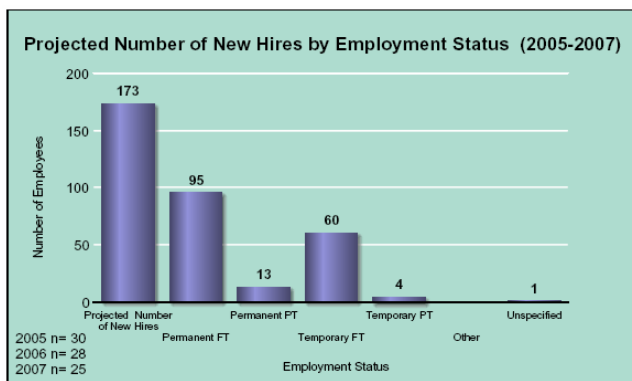


Labour Requirements:

- projected to have 173 new hires in the next 3 years (2005-2007)
- 55% projected to be permanent full-time employees, 35% temporary full-time
- 40% indicated difficulty sourcing qualified supervisors
- 70% of businesses expect some employees to retire within the next five years

Strategies for addressing labour needs utilized by this sector include:

- 64% very likely to upgrade skills of current employees
- 72% are either not very likely or not at all likely to attract employees from other organizations
- 65% are either very or somewhat likely to hire young people just entering the market
- 73% very or somewhat likely to hire immigrants with foreign training
- 86% are very or somewhat likely to more fully utilize the talents of underemployed workers

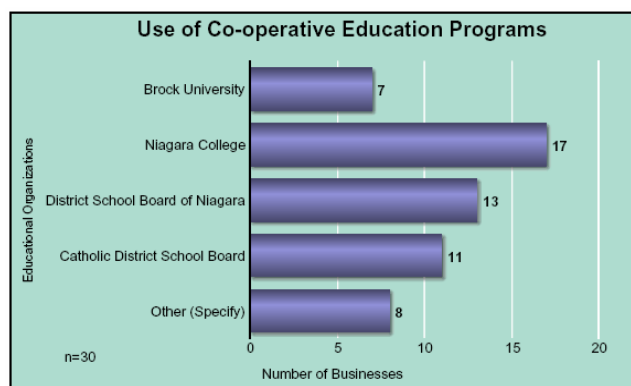
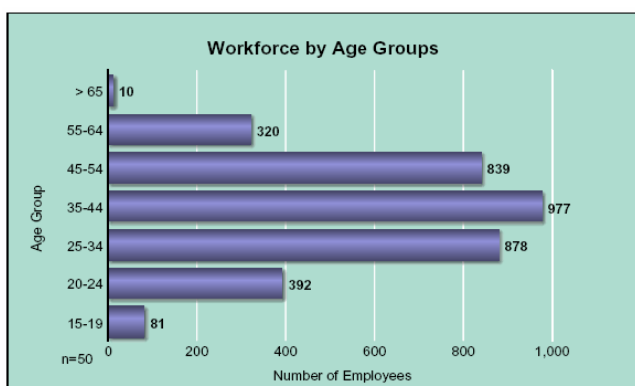


Business, Public & Transportation Distribution Service Sector

Niagara has created a healthy business service environment in which a growing list of professional engineering, planning, general contracting and noteworthy logistic companies flourish. Information Technology companies including computer game software companies, major e-commerce and other web-based businesses and many head offices are located in Niagara. The region is also home to several of Canada's leading technical support and inbound/outbound contact centres.

Workforce Facts:

- predominantly permanent full time employees
- divided between female (59%) and male (41%)
- 33% over the age of 45; the largest age group is 35-44 at 28% of the workforce, with 25% aged 25-34 and 24% aged 35-54
- employs 49% service/clerical workers making it the largest occupational category
- 74% of these service/clerical workers are female
- 93% of the technical/trades workers are male

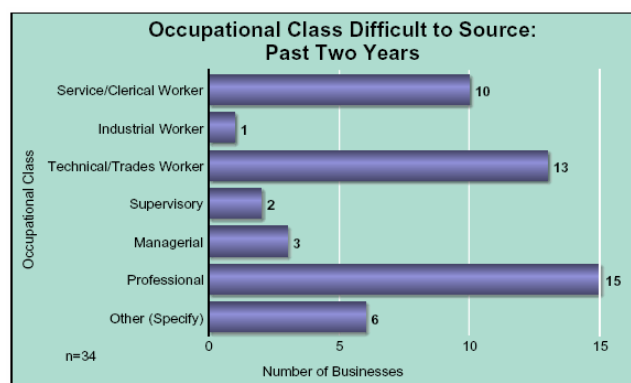
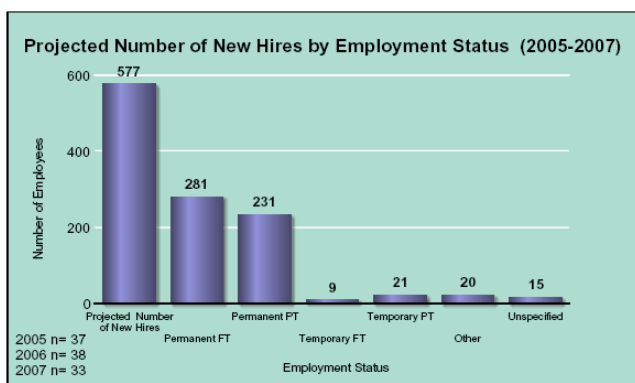


Labour Requirements:

- approximately 600 new hires are projected over the next 3 years (2005-2007) with 48% being permanent full-time positions and 40% permanent part-time hires
- 61% had difficulty sourcing qualified employees in the last two years, with the greatest difficulty experienced in professional positions (44.1%) and secondly technical/trades workers (38.2%)
- 51% percent expect less than 10% of employees to retire with the next 5 years

Strategies for addressing labour needs utilized by this sector include:

- 58% very likely to upgrade skills of current employees
- 27% very likely to attract workers from other organizations
- 24% very likely to hire young people entering labour market
- 4% very likely to hire recent immigrants with foreign training



The Tourism & Wine Sector

The Niagara Region is the heartland of the Canadian wine industry.

Workforce Facts:

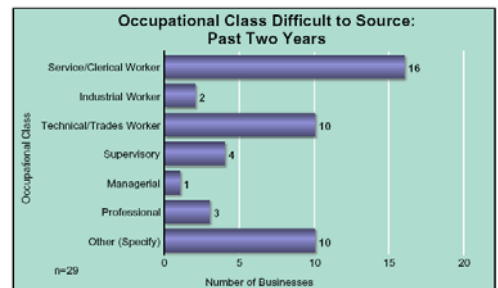
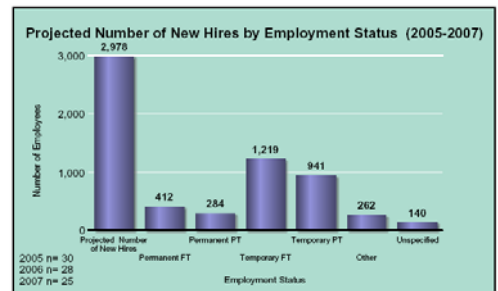
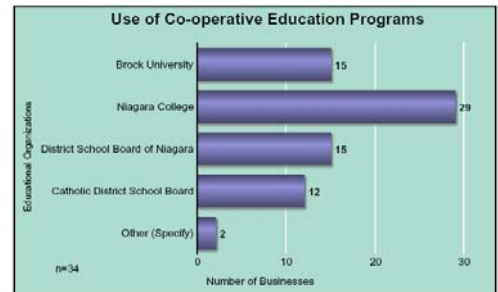
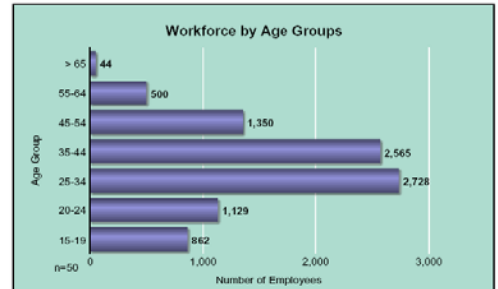
- majority of employees in this sector are permanent full-time at 48.7%
- permanent part-time employees account for almost 20% and temporary part-time for 19%
- 60% of employees are between 25-44 years of age; 14.7% are between 45-54 years of age, 12.3% are aged 20-24, and 9.3% are 15-19 years old; only 6% are over 55
- 76.5% are service/clerical workers with 9.7% supervisory
- 85% of respondents utilized Niagara College Co-operative education programs and almost half of that number utilized both Brock University and the District School Board of Niagara education programs. Of the 34 respondents, 35% indicated they used co-operative programs from the Catholic District School Board.

Labour Requirements:

- projected 2978 new hires over the next 3 years (2005-2007); 41% temporary full-time, 31.5% temporary part-time, 13.8% permanent full-time
- there is an indication that there may be more seasonal rehires than any other category
- 55% report service/clerical workers
- technical/trade workers at 34%
- regional shortage of technical/trades is common
- 55% expect less than 10% of their workforce to retire in the next 5 years
- most respondents indicated difficulty sourcing qualified employees in the last 2 years; the greatest difficulty experienced in service/clerical worker; technical/trades and other workers both 34.5%

Strategies for addressing labour needs utilized by this sector include:

- 85% indicate they are either very likely or somewhat likely to upgrade skills of current employees to address labour needs
- 67% are very likely or somewhat likely to attract employees from other organizations
- 85% are very likely or somewhat to hire young people just entering the workforce
- 72% are very likely or somewhat likely to hire immigrants with foreign training
- 68% are either very likely or somewhat likely to re-organize work more fully utilize employee talents



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