



Workforce Planning Board
of Waterloo Wellington Dufferin



Our Shifting Workforce and Workplaces

February 2023

Local Labour Market Plan Update 2023-24

Our Vision: We envision the continuous development of a leading-edge workforce.

Our Mission: Engage partners to find solutions to local workforce development needs.

We would like to express our sincere thank you to all those who made the time to participate in the development of this report, sharing their insight into their industries and the knowledge of our communities.

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The logo for the Government of Canada, featuring the word "Canada" in a serif font with a small Canadian flag to the right.



The logo for the Government of Ontario, featuring the word "Ontario" in a bold, sans-serif font followed by the Ontario trillium symbol inside a black circle.

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Message from Charlene Hofbauer, Executive Director

The last year has been challenging for employers and for jobseekers. I think we are facing monumental shifts to our workplaces and to our workforces even with a recession on the horizon. These changes mean trying things differently and seeing challenges through new eyes. One of my favourite insights in our consultation journey that got me thinking was that Gen Z are “keeping up with a different set of Joneses” than prior generations. When we talked more, that person reflected that they will probably never own a house in this market and knowing that gave them freedom to pursue what they loved and what interested them, not necessarily what would pay the mortgage – but vacations, money to go to events and having a car would be great so decent pay is still important. That thought process could change how HR practices, recruitment and retention need to operate if suddenly workers want to work to live and not live to work. And younger workers won’t be the only ones to shift their thoughts around work.

So, what are all these changes and what do they mean? I am not a futurist and I do not have a crystal ball, but in this report, I have tried to pull out some “Consider” pieces for the reader to think about “what could this mean?” How is what I have shared impacting your industry or what you set out to achieve as an organization? How can we do this differently to get different results? What is the future role of the recruiter or the supervisor? Change is not easy; we will fail so many times before we get it right. This is our opportunity as Waterloo, Wellington, Guelph and Dufferin to demonstrate our willingness to collaborate, to think outside the box and to move beyond the “pivot” and towards real change.

And we need to understand each other much better as employers, students, jobseekers and the people who support them.



Charlene Hofbauer

Methodology

This report used and analyzed relevant data to provide baselines for discussion with stakeholders around the challenges happening in the local labour markets: what fits, why are things happening, where are further challenges emerging. Our data sources include: 2016 and 2021 Census, Labour Force Survey, EmployerOne 2022, Canadian Business patterns, Findyourjob.ca and other Statistics Canada data. This data has been pulled at various levels depending on availability (Economic Region, CMA or County where possible). Comparisons have been drawn where possible to do so.

National Occupation classification codes from 2016 (4-digit system) are still in use as the 2021 system (5-digit system) was introduced late in the year and data sources are still shifting to the new system. We did have to use the concordance table to do wage data in the 2022 Top 5 Job Postings section.

Consultations were done with 53 stakeholders across Waterloo Wellington Dufferin, plus 2 industry roundtables, where actions were prioritized and where there may be opportunities to have leaders outside the Workforce Planning Board undertake those actions.

The priorities for the 2023-24 year continue to be what they have been in past years with a focus on getting as many people engaged in the labour market as possible.

- Connecting high school and first-time workers to the market
- Better information to guide jobseekers and workers looking to shift
- Supporting jobseekers to enter and re-enter the market
- Supporting employers to attract and keep the talent they want and need to stay open and grow

The team has connected with others in the community to determine who may be able to undertake these actions or was already developing some of these action pieces. The Workforce Planning Board has recorded as many of these community-based activities as possible and that were confirmed at time of report writing.

What does our labour force look like?

2021 was a census year and provides more insight into local numbers and perspectives. As many of the following charts as possible use Census 2016 and 2021 numbers to provide examples of the changes our labour market has been undergoing.

How Waterloo, Wellington and Dufferin have grown between 2016 and 2021

Area	2016 Population	2021 Population	# Change	% Change
Ontario	13,448,494	14,223,942	775,448	5.85%
Dufferin County	61,735	66,257	4,522	7.3%
Guelph & Wellington County	222,726	241,026	18,300	8.2%
Waterloo Region	534,154	587,165	53,011	9.9%
Waterloo Wellington Dufferin Board Area	1,103,076	1,201,731	98,655	9.3%

Source: Statistics Canada. 2022. *Census Profile*. 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released November 30, 2022.

Consider: The Waterloo Wellington Dufferin area has seen a higher rate of population growth than the province. The highest population growth in each area happened in Grand Valley (30.3%), Centre Wellington (10.3%) and City of Waterloo (15.7%).

How Young are our Communities

While it is great people want to come into our communities, the questions becomes “what are the ages of new migrants?” and “will they become members of our labour force?”. Looking at the 2021 Census, Ontario’s median age was 41.6 years old and 65.6% of the population was between the ages of 15 and 64, the bulk of the labour force. Our communities were split almost 50-50 over or under that number.

Community	Population between 15 and 64	Median age
Dufferin County	65.6%	40.4
Waterloo Region	67.2%	38.0
Guelph & Wellington County	65.1%	40.0

Statistics Canada. 2022. Census Profile. 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released November 30, 2022.

Consider: Our three areas are on par with the provincial numbers. Our youngest community is Mapleton (median age: 32.0) while Mulmur is our oldest median age community at 50.0 years.

Connection to the Workforce in the Population 15 and older

To track what was happening in 2022, we pulled data from 3 time periods to show the year-over-year and 6-month comparison.

	Labour Force (x1000)			Unemployment (X1000)			Not in Labour Force (x1000)		
	Dec 2021	May 2022	Nov 2022	Dec 2021	May 2022	Nov 2022	Dec 2021	May 2022	Nov 2022
K-W-C CMA	351.6	341.8	358.1	17.2	18.7	20.3	151.8	162.2	154.3
Guelph CMA	100.2	104.5	98.8	3.5	5.9	4.3	41.4	38.2	45.0
Rural Economic Region	249.4	254.7	276.4	13.0	10.0	14.8	148.6	147.1	129.2

Source: Statistics Canada. Labour Force Survey.

Consider: Guelph's workforce seems to be leaving more than the other regions. As of November 2021, 62% of the K-W-C not in the labour force number, 63% of Guelph's and 73% of the rural region's number are over 55 years of age and may never return to the workforce.

Median Individual Income

With the recent Census data, we can compare income at the census division for 2015 and 2020.



Consider: All of our communities have higher median incomes than the province. Women in Waterloo Region are on par with women across the province in this area while women in other areas earn more.

Educational Attainment

This is our first look at the shift in educational attainment across WWD since 2015.

Educational Attainment (15 and over)	Attainment in 2015	Attainment in 2020
No certificate, diploma or degree	123,090	118,338
Secondary diploma or equivalent	191,650	210,375
Apprenticeship, trades certificate or diploma	42,655	38,825
College certificate, diploma or degree	140,540	150,080
University certificate, diploma or degree	163,075	215,570

Source: Statistics Canada. 2022. Census Profile. 2021 Census of Population. Statistics Canada Catalogue no. 98-316-X2021001. Ottawa. Released November 30, 2022.

Consider: Highest educational attainment has risen across the Board area. Only apprenticeship has seen a decline which may be due to some skilled tradespeople undertaking college credentials over apprenticeship certificates or returning to school after apprenticeship.



Migration Data

Source for the following tables: Statistics Canada, Taxfiler.

Migration data shows communities who is moving in, and out, of their towns and cities. It can help show where communities are better able to attract or retain people and where some strategies may need to be developed.

Waterloo

Age Groups	In-Migrants		Out-Migrants		Net Migrants	
	2013-2018	2016-2021	2013-2018	2016-2021	2013-2018	2016-2021
0 – 17	22,226	25,547	15,613	16,378	6,613	9,169
18 – 24	17,541	25,392	12,529	15,026	5,012	10,366
25 – 44	49,959	65,162	35,750	38,789	14,209	26,373
45 – 64	15,981	17,106	15,723	17,061	258	45
65 +	7,544	7,492	6,106	6,863	1,438	629
TOTAL	113,251	140,699	85,721	94,117	27,530	46,582

Wellington

Age Groups	In-Migrants		Out-Migrants		Net Migrants	
	2013-2018	2016-2021	2013-2018	2016-2021	2013-2018	2016-2021
0 – 17	10,312	11,345	7,852	7,993	2,460	3,362
18 – 24	7,581	8,560	6,070	6,266	1,511	2,294
25 – 44	23,417	27,351	17,316	18,350	6,101	9,001
45 – 64	9,594	10,164	8,258	8,510	1,336	1,654
65 +	4,871	5,108	3,975	4,246	896	862
TOTAL	55,775	62,528	43,471	45,365	12,304	17,163

Dufferin

Age Groups	In-Migrants		Out-Migrants		Net Migrants	
	2013-2018	2016-2021	2013-2018	2016-2021	2013-2018	2016-2021
0 – 17	5,233	5,135	3,141	3,364	2,092	1,771
18 – 24	2,056	2,147	2,359	2,377	-303	-230
25 – 44	8,170	8,545	5,252	5,855	2,918	2,690
45 – 64	4,539	4,107	3,562	3,918	977	189
65 +	1,994	1,801	1,570	1,742	424	59
TOTAL	21,992	21,735	15,884	17,256	6,108	4,479

Consider: Waterloo and Dufferin have seen that 45+ population really decide to leave rather than move to their communities while it grows in the rural areas. Dufferin continues to see its 18 to 24 population be in a negative situation and fewer people moving in than out.

Occupational Shifts, Economic Region and Ontario 2018 and 2022 (1 Digit NOC and Name)

Looking at how employment levels have shifted can help to identify potential position shortages that could arise for businesses. Occupational employment levels are highlighted in the tables below. Data is for the economic region (Kitchener-Waterloo-Barrie) and the province.

Kitchener-Waterloo-Barrie Employment Levels by Occupation, 2018 and 2022

NOC Occupational Categories	2018	2022	% Change
Management	68.2	74.6	9%
Business, Finance, Administration	99.1	114.6	16%
Natural and Applied Sciences & Related Occupations	52.5	73.6	40%
Health	49.0	51.4	5%
Education, Law, Social, Community & Government	79.6	87.8	10%
Arts, Culture, Recreation & Sport	21.9	19.3	-12%
Sales and Service	172.1	171.0	-1%
Trades, Transport and Equipment Operators & Related Occupations	114.4	128.2	12%
Natural Resources, Agriculture & Related Production	14.0	12.6	-10%
Manufacturing and Utilities	63.5	69.6	10%
All Occupations	734.5	802.7	9%

Consider:

- Kitchener-Waterloo-Barrie (K-W-B) has had more employment growth than the province.
- Both geographies lost employment in Arts, culture, recreation and sport, Sales and service and Natural resources and agriculture.
- Growth in K-W-B's Business, finance and administration and Natural and applied sciences industries outpaced Ontario employment growth.
- Trades, transport and equipment operator occupations in K-W-B accounted for 75% of the growth in Ontario for those occupations.
- K-W-B is continuing to add employees to manufacturing roles despite declines at the provincial level.
- Local Health employment growth has not kept pace with provincial employment growth in the sector.

Ontario Employment Levels by Occupation, 2018 and 2022

NOC Occupational Categories	2018	2022	% Change
Management	697.3	788.2	13%
Business, Finance, Administration	1204.5	1332.8	11%
Natural and Applied Sciences & Related Occupations	599.6	788.8	32%
Health	496.7	573.2	21%
Education, Law, Social, Community & Government	788.2	879.7	12%
Arts, Culture, Recreation & Sport	217.1	215.0	-1%
Sales and Service	1708.4	1652.4	-3%
Trades, Transport and Equipment Operators & Related Occupations	968.1	986.5	2%
Natural Resources, Agriculture & Related Production	100.0	98.1	-2%
Manufacturing and Utilities	393.5	368.2	-6%
All Occupations	7173.3	7683	7%

Source: Statistics Canada. Table 14 -10-0389-01. Employment by occupation, annual (x 1,000).

Workforce Demographic Participation

The past year has seen a struggle for employers who are looking for candidates to fill their vacancies. There appears to be a person shortage. However, there are still groups in our workforce who are not being engaged and this section covers some of their challenges which may be alleviated with an understanding that their participation makes all workplaces better.

Younger and Older Workers

- Younger workers have faced a number of challenges over the past 3 years: remote schooling, reduced social interaction and varying mental health concerns.
- Across Kitchener-Waterloo-Barrie in November 2022, more youth 15-29 years old returned to the workforce and are working than in November 2020.
- 15 to 19 year olds are more likely to be unemployed. This group also has the highest number of people not in the labour force.
- Further exploration of youth not in employment, education and training will be done later this year through the Census data.
- The Baby Boomer generation is leaving as there has been a slow rise in the not in the labour force (NILF) numbers among the 55 and over workforce.
- NILF numbers show that most of the people who have left the labour force are 55 and over: 61% of Kitchener-Waterloo-Cambridge's NILF population, 62% of Guelph's population and 73% of the rural NILF population.
- Sometimes, people who are not participating may be convinced to re-engage, but with most of that population being older, they are more likely not to be a future source of labour.

Indigenous Persons

According to The Daily 2022-09-21, a publication released by Statistics Canada, the Indigenous population in Canada grew by 9.4% from 2016 to 2021. Indigenous persons in Canada are younger than the non-Indigenous population as well (33.6 years vs 41.8 years for median age). There is an opportunity to work with organizations serving Indigenous persons to understand how to support people to gain employment while also supporting employers to create culturally safe environments for potential staff. Looking at the chart below, Ontario's Indigenous population 15 and over is having more employment success than 2 years ago. Many of the gaps between the groups have closed in the past 2 years as more Indigenous persons are participating in the labour market.

Ontario 15 +	Employment Rate		Employment (x 1,000)		Un- employment Rate		Un- employment (x 1,000)		Participation Rate	
	2020	2022	2020	2022	2020	2022	2020	2022	2020	2022
Indigenous population	52.1%	59.3%	154.0	188.1	12.5%	7.3%	22.0	14.8	59.5%	64.0%
Non- Indigenous population	57.5%	61.3%	6859.2	7482.9	9.5%	5.6%	723.2	442.2	63.6%	65.0%

Source: Statistics Canada. Table 14-10-0364-01. Labour force characteristics by province, region and Indigenous group.

Women

- Usually, women have higher rates of not being in the labour force. However, in Kitchener-Waterloo-Cambridge CMA in November 2022, 7 in 8 people, 25 to 44 years of age, who were not in the labour force were women.
- In the other areas, the difference between men and women was much smaller or men were actually removing themselves from the workforce more than women.
- No one reason stands out for what determines participation. Child care staffing rates and availability spaces, transportation costs and other reasons have been identified as potential barriers to women's participation.

Immigrants

- Many of the immigrants who come to our area are economic immigrants and often have postsecondary or trades training that helped them get into Canada. They are not a fit for just any job posting that we have.
- The numbers that are estimated to be in Canada fluctuate quarter to quarter. In June, estimates with Immigration, Refugee and Citizenship Canada predicted over 450,000 immigrants for the 2022 year. That number was revised in September to be less than 400,000. Immigration is seeing a lot of ebb and flow with cost of living and affordability being a key consideration about where to live.
- International students need to be actively engaged in our communities so that they stay and decide to build their lives in Waterloo Wellington Dufferin. There are opportunities for employers to connect more with this talent pool.

Persons with Disabilities

This group is hard to find data on. The data in the next section shows that persons with disabilities do access Employment Ontario services. The StatsCan Survey on Disability was done in 2022 but there will not be any results for at least a year. As other groups have seen recovery of employment and better participation numbers, this group has little to no data.

On the ground, however, jobseekers with mental health challenges have struggled and, in some cases, continue to struggle with integrating into the labour market. Continued efforts by employers to shift their hiring, onboarding and retention practices could help attract and retain many of these unsure jobseekers. Asking every employee what they need to be successful, regardless of self-identification, could create better workplace environments for all staff.

How Employment Ontario services are supporting the WWD workforce

All data in this section is client data provided by the Ministry of Labour, Immigration, Training and Skills Development.

Literacy and Basic Skills

Literacy and Basic Skills providers have continued to engage more learners, slowly climbing back toward the 2019-20 level of 2,347 learners. In 2021-22, LBS worked with 1,938 learners and 1,111 of them were new. This is quite an achievement given the high number of vacancies in the workplace where jobs are more readily available at all skills levels.

Learner Demographics

- 975 of the learners were 25 to 44 with 609 being 15 to 24 years of age, a continuing trend of younger and working age learners.
- There are 2 female identifying learners for every 1 male identifying learner.
- Fewer learners were on assistance or had no income: 47% received one of OW, ODSP, EI or had no source of income while 45% were employed (full-time or part-time) or self-employed.
- The educational attainment of learners continues to be split. 36% of learners had taken some postsecondary or attained a postsecondary credential. 34% had less than a Grade 12 education while 30% had completed secondary.
- 261 learners identified as newcomers while 125 identified as racialized persons. Another 482 identified as a person with a disability while 59 identified as Indigenous.

Learner Goal Paths – 2-year comparison

Path	2020-21	2021-22
Apprenticeship	137	209
Employment	386	430
Independence	80	84
Postsecondary	868	824
Secondary School Credit	370	391

Learners are continuing to see that they need to upgrade their skills in order to advance beyond their current employment. This fits with the profile discussed above where many learners are working and are in the key working age demographic. Additionally, the increase in learners with an apprenticeship goal may create programming opportunities.

Referrals

Most referrals to LBS, 669 learners, come from informal word of mouth or media referrals. The second largest source of referrals to LBS comes from structured or formal referrals. These referrals could come from various sources (including employment service providers, other LBS programs or community referrals).

645 learners came from this source. Employment Ontario service providers referred 190 people to LBS in 2021-22. Most referrals from LBS are to postsecondary which aligns with many learners having postsecondary education goals (229).

Employment Services

While COVID brought challenges to EO, the very busy labour market has continued the trend of lower assisted clients locally. In 2020-21, 22,841 people were EO clients but only 5,093 required assistance. The high number of jobs available at all skills levels may have been a contributing factor to this continued decline. The analysis that follows is on the 5,093 clients.

Assisted Clients – 4-year trend

2018-19	2019-20	2020-21	2021-22
9,002	8,973	5,472	5,093

Client Profile in 2021-22

- 25 to 44 (2,753) with 45-54 being the second biggest group (1,360)
- 2,047 were on EI, OW or ODSP (EI dominant) while 1,830 had no source of income
- 2,592 had postsecondary/trades completion and 1,419 had a secondary school diploma
- Most people reported Manufacturing as their last industry (460) then Retail (250), Health care and social assistance (185) and Accommodation and food services (165)
- 1,591 had been out of employment for less than 3 months and 1,405 had been unemployed more than 12 months
- Internationally trained professionals and newcomers were the most identified groups followed by persons with disabilities and racialized persons

Consider:

- More clients are coming from Health care and social assistance. Employee burn-out may be driving people to leave and seek support as they shift into new opportunities.
- The number of people out of work more than 12 months rose substantially and signals that these clients may need more pre-employment supports, such as occupational training or skills upgrading.

Designated Groups

In 2021-22, 5,073 assisted clients self-identified with one of the designated groups 3,911 times. Internationally trained professionals and newcomers accounted for 2,106 of those answers. In this economy where skills expectations are rising, hopefully more internationally trained professionals will move into roles that are a good fit sooner.

Length of Time out of Employment or Training

	2020-21	2021-22
Less than 3 months	2000 (41%)	1591 (37%)
3 to 6 months	941 (20%)	561 (13%)
6 to 12 months	906 (19%)	766 (18%)
More than 12 months	968 (20%)	1405 (32%)

Most clients still reported being out of employment or training for less than 3 months, but there has been a rise in people reporting being out of the labour and training market for 12 months. These people may have more barriers and need those challenges addressed before they can return to work.

Where Clients Come From And Go To

Clients report where they come from and where they are headed to as they enter and exit from EO employment services.

In 2021-22, 319 people reported coming from service types of roles while another 200 had come from sales roles. 247 people were employed as machine operators, assemblers and labourers. 179 people had worked in administrative or office roles. Perhaps due to burn-out, 132 had come from care provider, technical health or paraprofessional roles in community and education. Surprisingly, 117 people reported that their former role had been in an industrial, electrical and construction or a maintenance and equipment operation trade.



Post-support, employment remained the largest outcome with 3,468 people employed. Another 801 clients chose to move forward into training or education programs. The top industries, for the data provided, showed that people went into: Manufacturing (75), Health care and social assistance (59), Retail trade (56), Administrative and support, waste management and remediation (39), Accommodation and food services (38) continued to be in fifth just ahead of Professional, scientific and technical services (31).

Skills Levels

To understand how much success different clients could have in the current market, we are comparing client educational attainment to the skills levels of occupational postings on www.findyourjob.ca over the same year April 1, 2021 to March 31, 2022.

National Occupational Classification (NOC) Level A roles require a university degree while NOC Level B roles need college attainment or apprenticeship to do the job. NOC C roles usually need secondary school attainment/specific occupational training. NOC D roles have on-the-job training, secondary school attainment may be needed.

Skills Levels Comparisons – EO client educational attainment levels and Findyourjob.ca Job Postings Skills Levels (April 2021 – March 2022)

NOC Level	EO client educational attainment	Job Postings by Skills Level
NOC Level A	1,304 have bachelor degree or more	48,909 postings
NOC Level B	1,288 have apprenticeship or college diploma/certificate	55,493 postings
NOC Level C	1,815 have completed Grade 12 or done some postsecondary courses	75,982 postings
NOC Level D	685 have less than a Grade 12	29,599 postings

Consider:

- NOC A and B roles are becoming a higher percentage of the job postings.
- Jobseekers with NOC A and B skills need to find the right jobs based upon their educational attainment and course work.
- Jobseekers with NOC C and D skills levels may find it easier to return to the market as employers can have people learn or do short-term training for more advanced roles.

Better Jobs Ontario 2021-22

Better Jobs Ontario, formerly Second Career, continues to support people to return to training with some changes in the program. The program has seen declining numbers in recent years.

- 311 people undertook Second career training in 2021-22 (330 in 2020-21)
- 85 people had Grade 12 or less, 111 people had some type of postsecondary credential (certificate, diploma, degree or postgrad)
- 198 were on Employment Insurance (52 had no source of income)
- 133 identified as a person with a disability, a newcomer or a racialized client
- When we look at how long people have been out of work: 154 had been out of work 6 months or less while 140 had been out of work more than 6 months
- More people seemed to go into a wider range of programs. The biggest were: Transport truck driver (65), Heavy equipment operator (17), Computer network technician (17), Accounting technician and bookkeeper (15)
- At exit: 79 were employed, 110 were unemployed and 66 were unknown status
- At the 12-month follow-up: 109 were employed, 31 were unemployed and 77 were unknown status

Youth Job Connection 2021-22

The Youth Job Connection program, and its summer version, seek to provide youth (15 to 29) with the skills to find and keep employment. Clients do tend to self-identify more than in other EO programs.



Who is enrolled	Youth Job Connection (YJC) 365 participants	YJC Summer 250 participants
Ages	300 are 15 to 24 65 are 25 to 44	250 are 15 to 24
Gender	165 females, 178 males	132 females, 113 males
Education	148 Less than Grade 12 164 Completed secondary 44 Certificate, diploma, degree (or some postsec)	224 Less than Grade 12 The number who reported less than Grade 9 was suppressed
Income Source	220 had no source of income 104 received OW, ODSP	229 had no source of income 13 were a dependent of someone on OW/ODSP
Clients who identified with designated groups	211 persons with disabilities 18 newcomers 52 racialized youth 23 Indigenous	61 racialized youth 56 persons with disabilities 36 newcomers

Apprenticeship 2021-22

There has been growth across all 3 categories and builds upon the growth in the previous year. The growth in new registrants and certificates issued is great as it means more people entering the trades and moving into journeyman roles.

Year	Active Registrations	New Registrants	Certificates of Apprenticeship Issued
2022-21	6184	1825	641
2020-21	5844	1309	536
2019-20	5613	2176	741

- The local planning area has 25% of all new and 24% of all active registrations in the Western Region of Ontario. Apprentices in Waterloo Wellington Dufferin have received 24% of all CofAs issued in the Western Region.
- Breakdown of the New Apprenticeship registrants in 2021-22
 - 891 are 15 to 24 and 879 are 25 to 44, average age is still 26
 - 1620 of the registrants are male
 - Most have completed secondary education - 1687
- 152 identify as Indigenous while 51 identify as a racialized apprentice, 28 report being francophone and 11 report being a person with a disability. All of these numbers grew from the previous year.

Top 5 Apprenticeships with New Registrants in 2021-22 and www.Findyourjob.ca Job Postings Demand (April to December 2022)

- Electrician 309A – 357 registrants (274 postings)
- Plumber 306A – 259 registrants (206 postings)
- Industrial Mechanic Millwright 433A – 195 registrants (588 postings)
- Automotive Service Technician 310S – 173 registrants (766 postings shared with 310T)
- Truck and Coach Technician 310T – 159 registrants (766 postings shared with 310S)

Employer Shifts and Expectations

Total Number of Businesses, 2019 to 2022

Business counts demonstrate how many businesses we are seeing opening, closing and shifting employment numbers across our areas. This comparison is our first pre-pandemic to emerging out of the pandemic picture and can help determine if the size of the business helped it fare better.

Consider:

- Business numbers across the Board area fell from 2019 to 2022. The area lost 5,203 businesses (6%). Dufferin lost 14% of its businesses, 75% of them owner operated.
- More businesses moved into the 100-199 or 500+ employees categories. One Dufferin employer moved out of the 500+ employees category.
- This comparison shows a stark decline in business numbers that was not seen in last year's data. There seems to be a much bigger gap between what was happening in 2019 and what happened in June of 2022. As predicted, it looks like some businesses have decided to cease operations in the wake of current financial realities.

DUFFERIN

NUMBER OF EMPLOYEES	2019	2022
0	5157	4396
1-4	1352	197
5-9	446	373
10-19	243	233
20-49	166	154
50-99	43	44
100-199	20	22
200-499	7	7
500+	2	1
TOTAL	7436	6427

WELLINGTON

NUMBER OF EMPLOYEES	2019	2022
0	19262	17763
1-4	4220	4015
5-9	1605	1573
10-19	1018	1000
20-49	664	650
50-99	218	208
100-199	90	105
200-499	66	54
500+	22	24
TOTAL	27165	25392

WATERLOO

NUMBER OF EMPLOYEES	2019	2022
0	38269	36117
1-4	9117	9035
5-9	3278	3248
10-19	2328	2201
20-49	1674	1649
50-99	553	528
100-199	261	279
200-499	138	128
500+	49	61
TOTAL	55667	53246

TOTAL

NUMBER OF EMPLOYEES	2019	2022
0	63188	58276
1-4	14662	14247
5-9	5329	5194
10-19	3589	3434
20-49	2504	2453
50-99	814	780
100-199	371	406
200-499	211	189
500+	73	86
TOTAL	90741	85065

Source: Canada Business Patterns, June 2019 and June 2022



Top Industries by Size, Comparison of 2019 and 2022

(3-digit NAICS, Name and Total Number of Businesses)

Source: Canada Business Patterns, June 2019 and June 2022

The following data indicates which sub-industries dominate the various employee size categories. The industries below are the top ones for each category in June of 2022.

Consider: The industry mix in the smaller employee categories has not shifted much, if at all. There are more noticeable shifts in the larger categories as industries that were top 5 only 3 years ago are no longer top 5 industries.

Without employees

Industry	2019	2022	Change
531 - Real estate	14,152	17,058	2906
541 – Professional, scientific and technical services	6408	6470	62
523 - Securities, commodity contracts & other financial investment and related activities	3699	3327	-372
238 - Specialty trade contractors	2997	2866	-131
112 - Animal production and aquaculture	2928	2648	-280



Micro 1-4 employees

Industry	2019	2022	Change
541 - Professional, scientific and technical services	2045	2271	226
484 - Truck transportation	1056	1396	340
621 - Ambulatory health care services	1233	1326	93
238 - Specialty trade contractors	1313	1310	-3
531 - Real estate	788	861	73

Small 5-99 employees

Industry	2019	2022	Change
722 - Food services and drinking places	1198	1131	-64
541 - Professional, scientific and technical services	871	952	81
238 - Specialty trade contractors	911	910	-1
621 - Ambulatory health care services	645	672	27
561 - Administrative and support services	549	581	32

Medium 100-199 employees

Industry	2019	2022	Change
445 - Food and beverage stores	29	35	6
623 - Nursing and residential care facilities	18	26	8
561 - Administrative and support services	18	25	7
722 - Food services and drinking places	18	23	5
238 - Specialty trades contractors	15	18	3
541 - Professional, scientific and technical services	13	18	5

Large 200-499 employees

Industry	2019	2022	Change
336 - Transportation equipment manufacturing	24	20	-4
561 - Administrative and support services	14	13	-1
452 - General merchandise stores	8	12	4
332 - Fabricated metal product manufacturing	8	11	3
333 - Machinery manufacturing	8	11	3
541 - Professional, scientific and tech services	18	11	-7

Very Large 500+ employees

Industry	2019	2022	Change
611 - Educational services	6	13	7
622 - Hospitals	7	8	1
336 - Transportation equipment manufacturing	8	7	-1
551 - Management of companies and enterprises	3	6	3
561 - Administrative and support services	6	6	0
913 - Local, municipal, regional public administration	8	6	-2

Employment Levels in Key Industries, 2019 to 2022

This data is for the Kitchener-Waterloo-Barrie Economic Region.



MANUFACTURING

2019: 111,200
2022: 126,600



PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES

2019: 50,900
2022: 69,800



WHOLESALE AND RETAIL TRADE

2019: 112,200
2022: 119,800



TRANSPORTATION AND WAREHOUSING

2019: 37,100
2022: 34,000



EDUCATIONAL SERVICES

2019: 63,100
2022: 70,400



ACCOMMODATION AND FOOD SERVICES

2019: 48,500
2022: 42,100



HEALTH CARE AND SOCIAL ASSISTANCE

2019: 84,400
2022: 84,100



CONSTRUCTION

2019: 71,500
2022: 72,900

2022 Top 5 Job Postings across Waterloo, Wellington Dufferin

Source: www.findyourjob.ca January to December 2022. Board area. Wage data from Government of Canada, Job Bank. Wage data updated 2022 and wages are for 2021 NOC equivalents.



1

6421 Retail Salespersons

7,671 postings (6,043 in 2021)

Median Wage: \$15.50

7452 Material Handlers

5,886 postings (6,834 in 2021)

Median Wage: \$19.75

2



6552 Other Customer and Information Services Representatives

5,209 postings (3,937 in 2021)

Median Wage: \$19.00

3



6711 Food Counter Attendants, Kitchen Helpers and Related Support Occupations

3,226 postings (2,813 in 2021)

Median Wage: \$15.50

4



0621 Retail and Wholesale Trade Managers

3,037 postings (2,004 in 2021)

Median Wage: \$42.67

5



Consider: January 2022 job postings for the area totalled 19,588 with a high in September of 23,741 available jobs. Since September job posting numbers have declined and in December 2022 totalled 16,810 jobs. There were fewer postings in December 2022 than just one year prior.

2022 Job Vacancy Rates

Job vacancies provide insight into where local businesses are struggling to find people and where workers may be more overwhelmed which could lead to retention issues.

Data Quality Legend for tables in this section

a Excellent data quality b Very good data quality c Good data quality
 d Acceptable data quality e Use with caution x suppressed data

NOC Occupation Group	Q3 2021	Q1 2022	Q2 2022	Q3 2022
All occupations	34,960a	32,285a	37,440a	37,085a
Management occupations	1280c	1215b	1570c	1400c
Business, finance and administration occupations	2275b	3255b	3220b	3095b
Natural and applied sciences and related occupations	2310b	2535c	2580b	1970b
Health occupations	2355c	2940c	3110b	4145c
Occupations in education, law and social, community and government services	1285c	2320d	2415c	2135c
Occupations in art, culture, recreation and sport	360d	500d	410d	575e
Sales and service occupations	12,925b	9320b	12,550b	12,670b
Trades, transport and equipment operators and related occupations	7325b	6220b	7380b	7115b
Natural resources, agriculture and related production occupations	520d	565d	730d	695d
Occupations in manufacturing and utilities	4275b	3415b	3465c	3280c

Consider demand:

- Sales and service: over $\frac{1}{3}$ are Food counter attendants and Retail salespeople.
- Natural and applied sciences: $\frac{1}{2}$ are Computer and information systems professionals
- Health: over $\frac{1}{3}$ are Assisting occupations in support of health services
- Trades and transport: Motor vehicle and transit drivers
- Manufacturing: $\frac{1}{3}$ are Labourers in processing, manufacturing and utilities

Industry Insights

Manufacturing and Construction

- For both industries, labourers are in high demand and these roles are more likely to be vacant based upon Quarter 3 2022 data. Lower pay and worker uncertainty around promotion opportunities and how they happen may be making people re-consider these industries.
- The need for driver's licenses and vehicles to access these industries is also a factor. A 2019 survey done by StudentMoveTO found 22% of surveyed students in the GTHA did not have licenses and 65% did not have cars which can make getting jobs in these industries challenging.

Health Care and Social Assistance

- WPBWWD did a Caring Occupations report in June, with an updated version in November, that outlined the demand for front-line staff. In most cases, these roles have full employment across the province and very few people are unemployed provincially.
- Recruitment efforts need to focus on verifying the credentials of internationally trained professionals as well as engaging students in the industry.

Education

- There are continued shortages in the education sector, especially with supply staff. Supply staff have been finding work in other sectors. School boards have used teacher consultants to cover absences in some cases.
- Postsecondary schools are also facing staffing shortages. As full-time roles have opened up, part-time staff pools have gotten smaller. In some programs, it has been hard to find instructors as working in their career fields is more lucrative than teaching.

Professional, Scientific and Technical Services

- This industry is one of the few where remote and hybrid work options are more possible due to the project and client-based nature of the work. Employment in the sector grew by 11,000 people between December 2021 and November 2022.
- The most in-demand roles are Software engineers and developers, Other customer and information services reps and Financial auditors and accountants.

Transportation and Warehousing

- Employment grew by almost 4,000 people between December 2021 and November 2022.
- During the pandemic, transportation companies sometimes had to turn away work. In the past few months, some companies have had openings and are looking for new clients and runs to fill their schedules.

Action Plan

This section reports on 2021-22 actions and highlights some proposed 2022-23 activities. WPBWWD is also highlighting where actions are being undertaken in the community to meet these priorities.

The pandemic has shifted some priorities going forward and put a new lens on many of the original priorities from the 2018-20 report.

Strategic Priority 1 Connecting first time workers to the labour market

Shift: This goes beyond nurturing the pipeline and focuses on connecting first time workers who may be older as they were unwilling to participate during the pandemic.



Action	Lead	Potential Partners	Outcome	Time
Skilled Trades local resource	WPBWWD	OYAP	Resource that can be used by educators to provide local resources and information around apprenticeship and skilled trades	Fall 2023
Buttoning up the Blue Collars	WPBWWD	CEC, BEP, EO, Conestoga	Best practices be used by those planning youth based career events with a focus on “blue collar” trades and industries (based upon youth participant feedback and event experimentation)	Early 2024
Completed				
First Jobs Campaign	WPBWWD	CEC, BEP,	Social media campaign	January 2023
Skilled Trades event – Dream Dufferin	Dufferin Board of Trade	Industry, Upper Grand DSB, Town of Orangeville, Georgian, WPBWWD	30 employers, 1000 students	September 2022
Encourage employers to take on more WIL students	Greater KW Chamber of Commerce	WPBWWD, Industry, Educators	Connections made between small employers and postsecondary	June 2022
Career education portal for teachers and students	Career Education Council	WPBWWD, Industry, Chamber of Commerce	Portal is now free for everyone to use	Mid-2022

Strategic Priority 2: Supporting jobseekers to enter, or re-enter, the labour market
Shift: People are choosing to remove themselves and need supports to come back to the market as pandemic subsidies

Action	Lead	Potential Partners	Outcome	Time
Employment Readiness sessions – Wellington County	WPBWWD	Business Centre Guelph-Wellington, townships, Employment Ontario	Connect to supports for those entering the labour market (training, jobs)	2023-24 year
Day in the Life videos and social media spotlights	WPBWWD	CEC, BEP, Town of Minto	Showed in-demand jobs and what a day looked like on the job, at our web site	November and December 2022. Continuing in 2023.
Mental health sessions and workshops	Various	Industry Associations, Chambers, Local governments	Support workers and employers with mental health concerns	Ongoing



Strategic Priority 3: Better information to guide jobseekers and workers looking to shift careers and industries

Shift: People are looking to change careers and industries but are unsure of how to make the shift and where to start.

Action	Lead	Potential Partners	Outcome	Time
Find Your Job clinics for jobseekers	WPBWWD	EO, postsecondary, immigration partnerships	Supply information to jobseekers that will help them as they consider in-demand roles, opportunities to shift careers and train on using the jobseeker accounts	2023-24
Skills for Industry Comparison	WPBWWD	Project Read	Resource for LBS and ES outlining what different industries look for when they talk about skills – 3 or 4 skills over 3 in-demand industries. Training will help support jobseekers	2023
Completed				
Mapping job supports	WPBWWD	Agilec, BEP, CCRW, CEC, KW Multicultural Centre, Project Read, Upper Grand DSB, Waterloo Region DSB	Tool to walk jobseekers through what local resources are a best fit for their employment search	February 2023

Strategic Priority 4: Supporting employers to attract and retain the talent they want and need to stay open and grow

Shift: Employers are facing a shortage of workers- whether it is labour or talent, depends upon industry. There seem to be more jobs than people looking.

Action	Lead	Potential Partners	Outcome	Time
Employer One 2024	WPBWWD	40 partners	500 companies complete the survey. Report for community.	2024
Findyourjob.ca clinics for employers	WPBWWD	Chambers	Clinics to teach employers how to use employer accounts to gather real-time LMI data through employer accounts	2023-24
Youth Onboarding: Supports for Successful Integration	WPBWWD	Carizon, EO	Templates, information and practices for employers to use when onboarding youth	Fall 2023
Know your Job Seeker	WPBWWD	EO, Local employers, Chamber	Labour force reports around their workforce. Feedback to employers and industries around what jobseekers seek in job postings so employers can improve marketing	2023
Completed				
Employer Resource at findyourjob.ca	WPBWWD	6 Local employers	One page recruitment and retention resource developed for employer, findyourjob.ca	January 2023
Recruitment series for employers	Local Chambers of Commerce	WPBWWD, local partners	Workshops on how to do better job postings and how employers can market themselves to attract talent	February to October 2022
Jobseeker wants and needs in the current labour market	WPBWWD	Summer student project	Research done into what jobseekers want and their priorities, presentation in development	September 2022

Participating Organizations in Our Consultations

- Action Read
- Agilec
- BDC
- Business and Education Partnership of Waterloo Region
- Business Centre Guelph-Wellington
- Cambridge Career Connections
- Career Education Council
- City of Guelph
- City of Waterloo
- CLAC
- Community Living Dufferin
- County of Dufferin
- County of Wellington
- Conestoga College
- Dana Corporation
- Georgian College
- Grand River Hospital
- Grand Valley Construction Association
- Grow Guelph Clean Energy roundtable
- Grow Guelph ICT roundtable
- Honorthework.ca
- Hood Excavac Services
- Ice River Springs
- Immigration Partnership of Waterloo Region
- Innovation Guelph
- Kerry's Place (Ready, Willing and Able Program)
- Kids Ability
- Kitchener-Waterloo Multicultural Centre
- KTH Shelburne
- Local Immigration Partnership Guelph-Wellington
- Ministry of Economic Development, Job Creation & Trade
- Palette Skills
- Project Read
- Region of Waterloo
- Saugeen Business Development Corporation
- Service Canada
- Second (2nd) Chance Employment Counselling
- St Louis Adult Learning Centre
- The Literacy Group
- Town of Erin
- Town of Minto
- Township of Centre Wellington
- Township of Mapleton
- Township of Wellington North
- Uni-Lock
- University of Waterloo
- Upper Grand District School Board
- Walker Environmental Group
- Waterloo Region District School Board – Essential Skills Upgrading
- Waterloo Catholic District School Board
- Wellington Catholic District School Board
- Wellington County Learning Centre
- Wellington Federation of Agriculture
- Wellington Health Care Alliance
- Wellington Waterloo Community Futures



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