Final Report

County of Perth, Town of St. Marys and City of Stratford

Labour Market Analysis

April 20th, 2010

Ontario

Completed with the generous assistance of the Ministry of Training, Colleges and Universities

Contents

List of Figures

Appendices

I. National Occupation Classification (NOC) Definitions

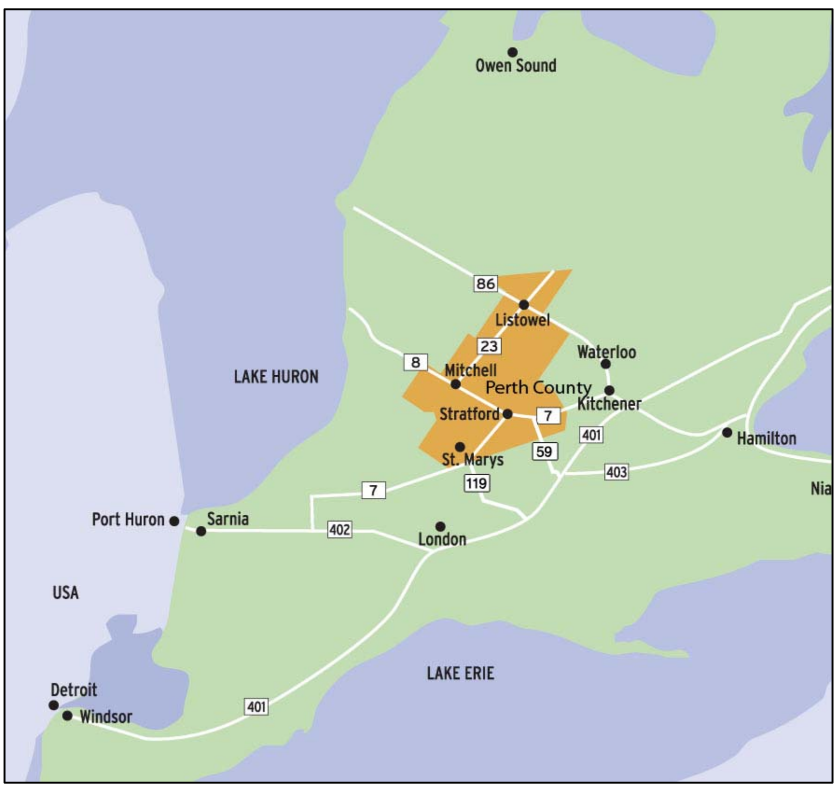
II. National American Industry Classification System (NAICS) Definitions

1 Introduction

The County of Perth, Town of St. Marys and City of Stratford (herein referred to as `the region`) are nestled in southwestern Ontario. (See Figure 1). The region has an agricultural heritage since much of the land base and climatic conditions are suited for agricultural and farming activities. The City of Stratford has developed as the largest urban centre in the region followed by the Town of St. Marys. In recent years the area has developed as a rather unique region in Ontario, with a mix of manufacturing industries, innovative businesses and a strong base of arts and cultural industries due in large part to the presence of the world renowned Stratford Shakespeare festival.

The region's proximity to several cities in Southwestern Ontario has been a benefit to the region. With cities such as Kitchener, Waterloo, Cambridge, Woodstock and London located nearby many of the agricultural and manufacturing industries have been able to supply products to a larger pool of businesses and consumers. The proximity to these larger cities has also resulted in an opportunity for a post-secondary institution to expand into Stratford – the University of Waterloo Stratford Institute. This institution will be a research, education and convergence centre that will draw researchers, businesses and entrepreneurs together to create, examine and commercialize opportunities in the digital media field of the global economy.[1]

Figure 1 – Location in the Southwestern Ontario



Source: The Corporation of the County of Perth, 2009.

[1] University of Waterloo Stratford Institute, About the Stratford Institute, http://stratfordinstitute.uwaterloo.ca/about.html, viewed on December 21st, 2009.

1.1 Report Objectives

The objectives of the Labour Market Analysis report are to:

- Identify the skills base present in the region;
- Determine the competitive position of the local labour force in relation to southwestern Ontario and the Province;
- Identify key considerations and opportunities to build and strengthen the labour force, and
- Draw conclusions from the analysis that requires action for labour force retention, development and constraints.

1.2 Approach

Time spent in developing the Labour Market Analysis report focused on three areas.

1. A demographic profile – developing an understanding of the local population base by answering key questions such as:
    a. Is the population base growing?
    b. What is the age distribution in the region?
    c. What level of education do the residents have?
    d. What fields of study did residents develop skills in?
    e. What level of income are households accustomed to?
    f. What is the level of ethnicity in the region?
2. A labour force profile – developing an understanding of the labour force characteristics by answering key questions such as:
    a. Where are residents and employees commuting to?
    b. What types of jobs are being filled?
    c. What industries are residents employed in?
    d. What are wage rates for typical labour force occupations?
3. A business profile – developing an understanding of local business by answering key questions such as:
    a. Has there been business growth?
    b. In what industries have businesses being growing? What are the fastest growing industries?
    c. Is small business a large or small part of the business community?
    d. What is the business size distribution?
4. Local labour training initiatives – developing an understanding of existing local training initiatives
    a. What training is available in the region?
    b. Who are the organizations involved?
    c. How many people are enrolled in the training?
    d. Are there plans for further developing the training program?

The key findings from this analysis are summarized in the report. The report concludes with a discussion of considerations and opportunities to build and strengthen the labour force and actions for labour force retention, development and constraints. The labour force considerations and opportunities will be included as input for the creation of the Regional Economic Development Plan.

The project partners acknowledge the Ontario Ministry of Training, Colleges and Universities for its generous contribution that has made this project possible.

2 Situational Analysis

2.1 Demographic Profile

2.1.1 Population Growth

The region has experienced modest population growth in recent years. Statistics Canada reported that between 1996 and 2006, the entire region added 2,238 new residents, an increase of 3.1% over this ten year period. (See Figure 2). The majority of this growth (1,454 residents) occurred in the city of Stratford. Strong growth occurred during this time period in St. Marys with 665 new residents (11.2% growth) and slight growth occurred in the County of Perth (119 new residents). By 2009 the region had a population of 75,276 residents (a net increase of 932 residents or 1.3% growth). The city of Stratford accounts for almost all of the growth (1,251 new residents) with slight growth occurring in St. Marys (149 new residents). The population is estimated to have decreased in Perth County by 468 residents.

Figure 2 - Historic and Current Population Growth, 1996 to 2009

Population	1996	2001	2006	2009	2006 - 2009 % Change	2006 - 2009 (3 Years) Net Increase	2001 - 2006 % Change	2001 - 2006 (5 Years) Net Increase	1996 - 2006 % Change	1996 - 2006 (10 Year Net Increase)
West Perth	8,907	9,129	8,839				-3.2%	-290	-0.8%	-68
Perth East	12,089	12,119	12,041				-0.6%	-78	-0.4%	-48
North Perth	11,808	12,055	12,254				1.7%	199	3.8%	446
Perth South	4,343	4,299	4,132				-3.9%	-167	-4.9%	-211
Perth County	37,147	37,602	37,266	36,798	-1.3%	-468	-0.9%	-336	0.3%	119
St. Marys	5,952	6,293	6,617	6,766	2.3%	149	5.1%	324	11.2%	665
Stratford	29,007	29,780	30,461	31,712	4.1%	1,251	2.3%	681	5.0%	1,454
Total	72,106	73,675	74,344	75,276	1.3%	932	0.9%	669	3.1%	2,238

Source: Statistics Canada, Census of Population: 1996, 2001, 2006, Manifold Data Mining, 2009.

It is estimated that population in the region will grow to 85,838 residents by 2021, an increase of 11,494 residents from 2006. Again, the majority of the population growth is anticipated to occur in the city of Stratford. (See Figure 3).

Figure 3 – Projected Population Growth, 2006 to 2021

	2006	2021	2006-2021 Increase
Perth County	37,266	41,214	3,948
St. Marys	6,617	7,682	1,065
Stratford	30,461	36,942	6,481
Total	74,344	85,838	11,494

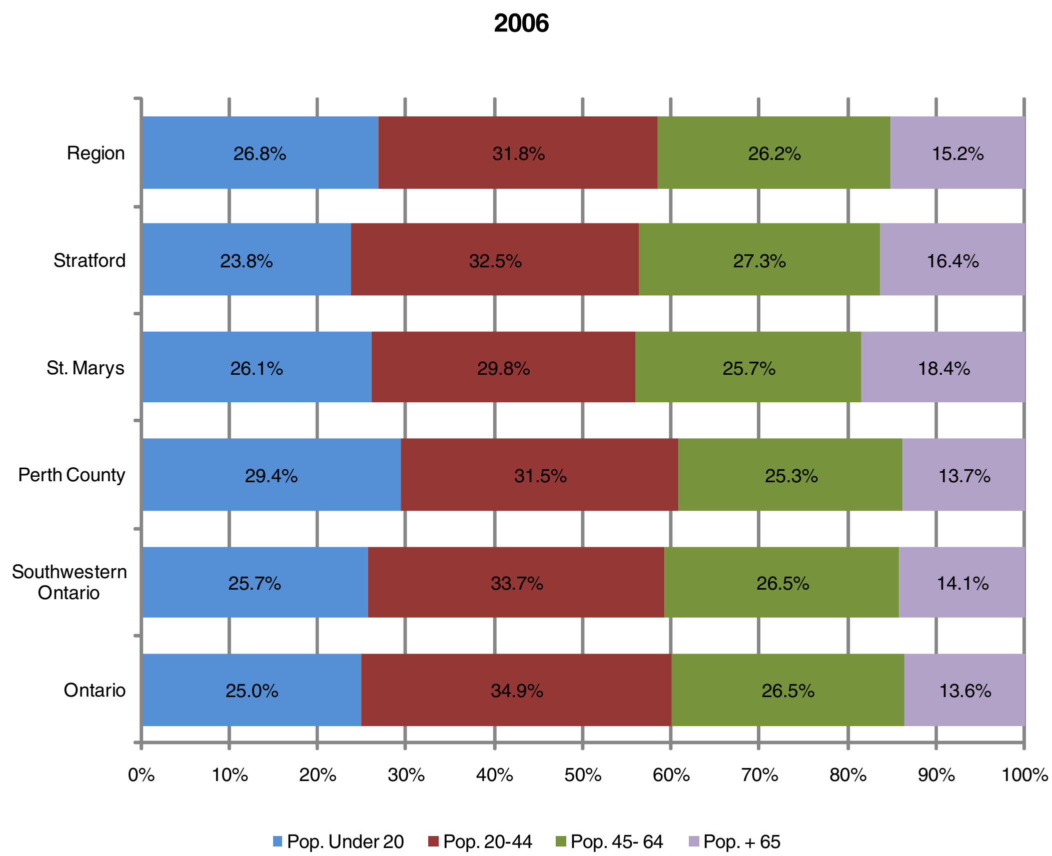
Source: Perth County Official Plan, 2008, Town of St. Marys Official Plan, 2007, City of Stratford Long Term Development Forecasts, 2003.

2.1.2 Population by Age Structure

A review of the age structure for the region from 2006 to 2009 reveals some important considerations moving forward. Figure 4 illustrates the changes in the region's demographic profile over this period. In 2006, 31.8% of the regional population was within the 20-44 year old age group. The next largest age group (26.8%) was within the population under 20 years. There were similar findings attributed to the

Province of Ontario with the population 20-44 years old being the largest segment followed by the population under 20 years. By 2006, the region's largest population segment remained the 20-44 years old (31.8%) followed by the segment under 20 years old (26.8%). The local communities had different trends. Perth County's population under 20 years of age accounted for 29.4% of the population, larger than Southwestern Ontario (25.7%) and Ontario (25.0%). The City of Stratford's largest population segment was the 20-44 years of age (32.5%) followed by the 45-64 years of age (27.3%), which was more in line with the population age structure of Southwestern Ontario and Ontario. The slightly higher percentage of population under 20 years in the region indicates an opportunity to retain a portion of the future workforce provided that advanced education and employment is available. In addition, the population age structure difference in Stratford in comparison to the rest of the region indicates that the city is an attractive location for older families.

Figure 4 - Age Structure, 2006

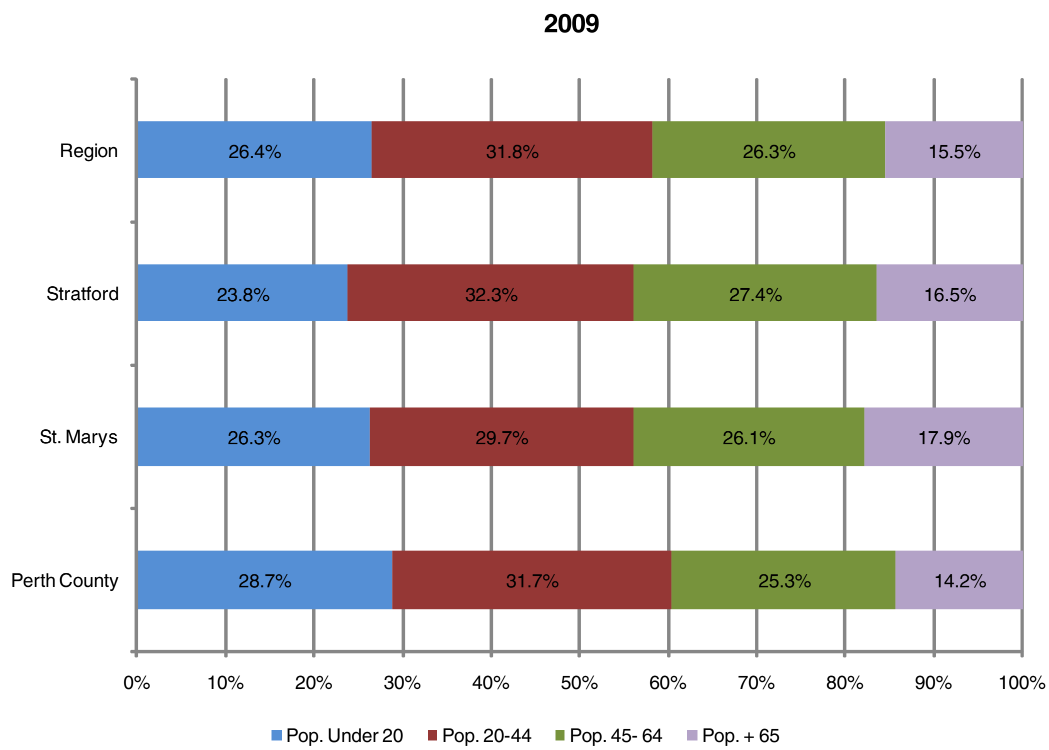


Source: Statistics Canada, Census of Population, 2006.

In 2009, the age structure for the region has shifted slightly. The largest segment of the population remains the 20-44 years of age (31.8%), but the proportion of the population 44-64 years of age has increased and population under 20 has decreased indicating an aging population base. (See Figure 5).

The region's proportion of the population over 65 years of age also increased from 15.2% in 2006 to 15.5% in 2009.

Figure 5 - Age Structure, 2009



Source: Manifold Data Mining Inc., 2009.

2.1.3 Educational Attainment

The level of educational attainment in a municipality can be used as a general indicator of the capacity for innovation of the local population. Generally put, educational attainment is often seen as a contributing factor to the quality of the "human capital" of a municipality, or the accumulation of skills and talents which manifests itself in the educated and skilled workforce of the region (Mathur, 1999).

In 2006, less than half (49.5%) of the regional population 25 to 64 years of age (30,130 residents) had attained some form of post-secondary education, significantly lower than Southwestern Ontario (56.0%) and Province of Ontario (61.5%). (See Figure 6). The population base in the region was more inclined to attain college education (23.9%) than university education (15.2%), which may reflect the historic importance of the region's manufacturing sector. This trend was consistent with Perth County (22.7% vs. 11.7%), St. Marys (23.7% vs. 15.4%) and Stratford (25.1% vs. 19.1%). The regional population base having attained an apprenticeship (10.4%) was also a larger portion of the population in comparison to Southwestern Ontario (10.1%) and Ontario (8.8%). The Four County Labour Market Planning Board[2]

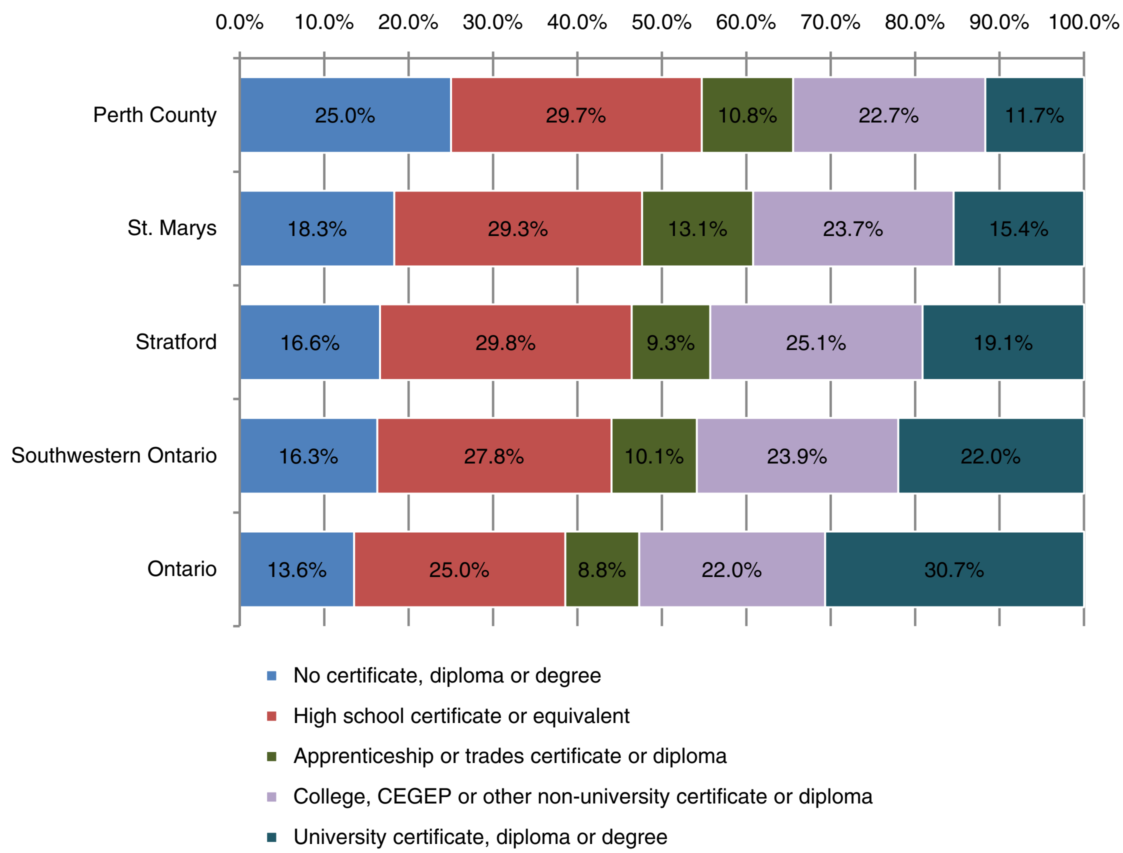
[2] The Four County Labour Market Planning Board includes communities within the Counties of Grey, Bruce, Huron and Perth.

identifies in the *Trends Opportunities and Priorities Report* (March 2009) that the Perth County region has a competitive advantage over Ontario with the higher rates of the population with an apprenticeship or trades certificate or college certificate. However, this Board also states the labour market's at a competitive disadvantage with higher numbers of persons with no certificate, diploma or degree and lower number of persons with university certificate, diploma or degree than the Province of Ontario.

The region benefits from being located within 75 kilometres from at least one of the following post-secondary institutions: Conestoga College (Kitchener main campus); Fanshawe College (London main campus); the University of Waterloo; Wilfrid Laurier University (Waterloo); and University of Western Ontario (London). The proximity to these schools helps make post-secondary education more accessible for the population. In addition, proximity to these schools enables the attraction of a workforce with higher education attainment levels.

Greater consideration should be given to ways to create local opportunities for college and apprenticeship graduates in order to improve the region's labour force credentials and employment prospects. This is particularly important given Ontario is shifting towards a more technology based, higher value-added economy, whether it is the goods producing or service elements of the economy.

Figure 6 – Highest Educational Attainment, 2006



Source: Statistics Canada, Census of Population, 2006.

2.1.4 Education by Major Field of Study

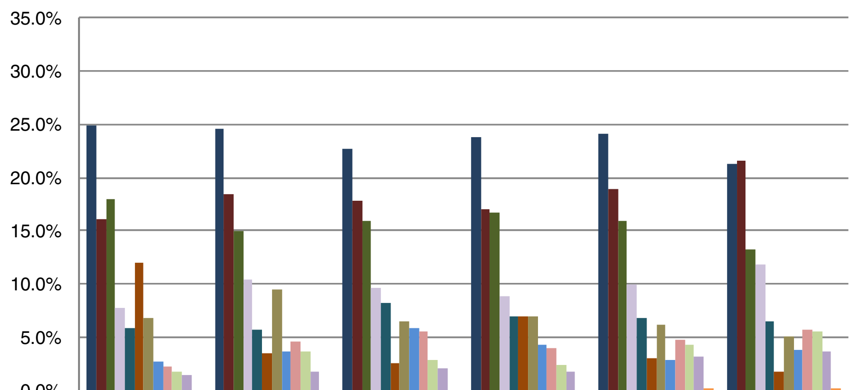
As Figure 7 indicates, of the 18,815 residents in the region between the ages of 25 and 64 that obtained post secondary education, the highest concentration by major field of study were in:

- Architecture, engineering, and related technologies (23.8%);
- Business, management and public administration (17.1%); and
- Health, parks, recreation and fitness (16.7%).

Overall, these three major fields account for over half (57.6%) of the individuals with post-secondary credentials in the region. Compared to the Province, this region had a higher concentration of graduates in architecture, engineering and related technologies, health, parks, recreation and fitness. The high concentration of individuals in architecture, engineering and related technologies and business management may represent an opportunity to foster shared experiences between more senior professionals, business persons and entrepreneurs in the community. These results may also speak to the attraction of the region for this form of business activity.

Figure 7 – Education by Major Field of Study, 2006

2006



	Perth County	St. Marys	Stratford	Region	Southwestern Ontario	Ontario
Architecture, engineering, and related technologies	24.8%	24.5%	22.6%	23.8%	24.1%	21.3%
Business, management and public administration	16.1%	18.4%	17.8%	17.1%	18.9%	21.6%
Health, parks, recreation and fitness	17.9%	15.0%	16.0%	16.7%	15.9%	13.2%
Social and behavioural sciences and law	7.8%	10.4%	9.7%	8.9%	10.0%	11.8%
Education	5.8%	5.8%	8.2%	6.9%	6.9%	6.6%
Agriculture, natural resources and conservation	12.1%	3.5%	2.6%	6.9%	3.0%	1.9%
Personal, protective and transportation services	6.9%	9.5%	6.4%	6.9%	6.2%	5.0%
Visual and performing arts, and communications technologies	2.7%	3.7%	5.9%	4.3%	2.9%	3.8%
Humanities	2.3%	4.6%	5.6%	4.0%	4.8%	5.7%
Mathematics, computer and information sciences	1.8%	3.7%	2.8%	2.5%	4.2%	5.5%
Physical and life sciences and technologies	1.4%	1.7%	2.1%	1.8%	3.2%	3.6%
Other fields of study	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Statistics Canada, Census of Population, 2006.

2.1.5 Household Income

Average household income rates provide important information about the wealth generated by the local population. High income rates suggest a high level of disposable income, which in turn could mean that there is a strong local market for business, especially in the retail and personal service sector. Figure 8 identifies the 2005 household income rates for the region in comparison to Southwestern Ontario and the Province of Ontario. These results indicate the highest number of households have income levels in excess of $100,000 (17.6%); however, the proportion of households with incomes in excess of $100,000 is higher for Southwestern Ontario (21.3%) and the Province of Ontario (24.0%). Household income levels in the region are also higher for the $30,000 to $59,999 segments than Southwestern Ontario and the Province. Median household income and average household income is also lower in communities in the region, such as St. Marys and Stratford, than the Province of Ontario. This finding suggests that there are lower living costs for larger purchases such as homes.

Figure 8 – Households by Income, 2006

	Perth County		St. Marys		Stratford		Region		Southwestern Ontario		Ontario	
	Total	% of Total	Total	% of Total	Total	% of Total	Total	% of Total	Total	% of Total	Total	% of Total
Total Number of Households	13,050		2,625		12,880		28,555		944,810		4,555,025	
Under $10,000	315	2.4%	85	3.2%	470	3.6%	870	3.0%	36,150	3.8%	198,235	4.4%
$10,000 to $19,999	885	6.8%	240	9.1%	1,295	10.1%	2,420	8.5%	85,255	9.0%	398,830	8.8%
$20,000 to $29,999	1,075	8.2%	160	6.1%	1,285	10.0%	2,520	8.8%	87,965	9.3%	408,130	9.0%
$30,000 to $39,999	1,515	11.6%	340	13.0%	1,445	11.2%	3,300	11.6%	97,805	10.4%	447,475	9.8%
$40,000 to $49,999	1,355	10.4%	305	11.6%	1,435	11.1%	3,095	10.8%	92,560	9.8%	419,525	9.2%
$50,000 to $59,999	1,430	11.0%	275	10.5%	1,285	10.0%	2,990	10.5%	84,680	9.0%	385,555	8.5%
$60,000 to $69,999	1,185	9.1%	235	9.0%	940	7.3%	2,360	8.3%	78,495	8.3%	356,990	7.8%
$70,000 to $79,999	1,030	7.9%	245	9.3%	1,135	8.8%	2,410	8.4%	70,100	7.4%	324,835	7.1%
$80,000 to $89,999	1,065	8.2%	185	7.0%	820	6.4%	2,070	7.2%	60,675	6.4%	282,910	6.2%
$90,000 to $99,999	740	5.7%	135	5.1%	600	4.7%	1,475	5.2%	49,955	5.3%	238,720	5.2%
$100,000 and over	2,425	18.6%	415	15.8%	2,180	16.9%	5,020	17.6%	201,075	21.3%	1,093,810	24.0%
Median household income $			$56,317		$54,128						$60,455	
Average household income $			$65,818		$65,046						$77,967	

Source: Statistics Canada, Census of Population, 2006.

2.1.6 Immigration and Ethnicity

Immigration will be the primary source of population growth in Canada given the declining rates of population growth by natural increase. As a result, governments across Canada are implementing strategies designed to attract skilled immigrants. Government initiatives such as the federal Foreign Credentials Referral Office and provincial Bridge Training Program help new Canadians transition into the labour market. As illustrated in Figure 9, the region has not attracted as many new Canadians as other regions in Ontario. In 2006, the non-immigrant population was 90.4% of the total population compared to 82.3% for Southwestern Ontario and 70.8% for Ontario. Only 8.5% of the region's population had immigrated to Canada over 5 years ago and 1.0% had immigrated less than 5 years ago. Similar immigration trends occurred in Perth County, St. Marys and Stratford.

The region needs to consider the high proportion of the population that is not a recent immigrant and its attractiveness for migrants and immigrant skilled workers. There is need for the regional stakeholders to communicate the benefits of a skilled immigrant workforce to local business and industry.

Figure 9 - Population by Immigrant Status, 2006

Source: Statistics Canada, Census of Population, 2001 & 2006.

The ethnic diversity of a community can also have wide implications in terms of the cultural and community services that may be required to support this portion of the local population and the approach for attracting and sustaining a skilled workforce. Most importantly, diversity in a community is also an indicator of tolerance or openness within a community, and the degree to which a community is viewed as supportive of a wide range of residents.

Statistics Canada gathers data by visible minority status, which is covered by the broad definition of individuals that are "non-Caucasian in race or non-white in colour, other than Aboriginal." The concept, definition, and classification originally set out in the Employment Equity Act has been met by some contention based on its arbitrary classification of individuals into broad categories, obscuring some differences that may be important within each classification. For example, a Canadian-born individual that self-identifies as "Chinese" may have a very different set of experiences and cultural values than someone who more recently immigrated to Canada from China. However, visible minority status remains a relatively reliable statistical method of quantifying some level of diversity in an area.

Overall, the population by visible minority status in the region declined by 4.0% between 2001 to 2006, driven in part by a decline in Perth County (14.1% decline). (See Figure 10). Visible minorities in the region total 1,565 residents for 2006. The majority of these residents live in Stratford (1,165 residents). Population growth is being driven by the non-visible minorities. This finding is contrary to visible minority growth in Southwestern Ontario (32.1% from 2001 to 2006) and the Province (27.5% from 2001 to 2006).

With future labour force growth in the province dependent on the immigration of skilled individuals from outside of North America, the region is challenged to attract and retain workers from diverse cultural groups. Ultimately, the region is challenged to ensure future competitiveness and economic growth.

Figure 10 - Population by Visible Minority Status, 2001-2006

	Perth County			St. Marys			Stratford		
	2006	2001	% Change	2006	2001	% Change	2006	2001	% Change
Total population by visible minority groups	36,840	37,200	-1.0%	6,555	6,070	8.0%	30,025	29,185	2.9%
Total visible minority population	305	355	-14.1%	95	75	26.7%	1,165	1,200	-2.9%
Chinese	10	65	-84.6%	35	10	250.0%	210	215	-2.3%
South Asian	70	120	-41.7%	0	0	0.0%	260	330	-21.2%
Black	50	75	-33.3%	20	15	33.3%	255	230	10.9%
Filipino	10	0	0.0%	0	0	0.0%	30	65	-53.8%
Latin American	45	10	350.0%	15	35	-57.1%	110	135	-18.5%
Southeast Asian	25	30	-16.7%	0	20	-100.0%	195	145	34.5%
Arab	0	0	0.0%	10	0	0.0%	10	20	-50.0%
West Asian	0	0	0.0%	0	0	0.0%	0	0	0.0%
Korean	45	0	0.0%	0	0	0.0%	35	30	16.7%
Japanese	10	15	-33.3%	0	0	0.0%	35	15	133.3%
Visible minority, n.i.e.	15	25	-40.0%	0	0	0.0%	10	10	0.0%
Multiple visible minority	10	10	0.0%	0	0	0.0%	10	15	-33.3%
Not a visible minority	36,535	36,840	-0.8%	6,450	6,000	7.5%	28,860	27,980	3.1%

	Region			Southwestern Ontario			Ontario		
	2006	2001	% Change	2006	2001	% Change	2006	2001	% Change
Total population by visible minority groups	73,420	72,455	1.3%	2,415,940	2,299,735	5.1%	12,028,895	11,285,550	6.6%
Total visible minority population	1,565	1,630	-4.0%	209,005	158,220	32.1%	2,745,200	2,153,045	27.5%
Chinese	255	290	-12.1%	30,090	22,120	36.0%	576,980	481,510	19.8%
South Asian	330	450	-26.7%	42,035	29,455	42.7%	794,170	554,870	43.1%
Black	325	320	1.6%	36,680	32,090	14.3%	473,760	411,095	15.2%
Filipino	40	65	-38.5%	10,735	7,845	36.8%	203,220	156,515	29.8%
Latin American	170	180	-5.6%	22,615	14,000	61.5%	147,135	106,835	37.7%
Southeast Asian	220	195	12.8%	17,115	15,360	11.4%	110,045	86,410	27.4%
Arab	20	20	0.0%	22,975	17,405	32.0%	111,405	88,545	25.8%
West Asian	0	0	0.0%	8,065	5,155	56.5%	96,615	67,105	44.0%
Korean	80	30	166.7%	5,955	4,235	40.6%	69,540	53,955	28.9%
Japanese	45	30	50.0%	2,390	2,075	15.2%	28,080	24,925	12.7%
Visible minority, n.i.e.	25	35	-28.6%	4,345	5,435	-20.1%	56,845	78,915	-28.0%
Multiple visible minority	20	25	-20.0%	5,925	3,025	95.9%	77,400	42,375	82.7%
Not a visible minority	71,845	70,820	1.4%	2,206,925	2,141,515	3.1%	9,283,690	9,132,500	1.7%

Source: Statistics Canada, Census of Population, 2001 & 2006.

2.2 Labour Force Profile

Statistics Canada collects labour force data for the Canadian population aged 15 and over, in the 15-24 year old (young adult) population, and the working age population, or those aged 25-64 years of age. Between 2001 and 2006 the labour force in Perth County, St. Marys and Stratford grew by 1,060 people (or 2.6%). (See Figure 11). Half of the labour force growth was from Stratford residents. In comparison, Southwestern Ontario`s labour force increased by 85,360 people (6.8%) and the province`s labour force increased by 8.2% over the same time period. The region`s small job growth and slow labour force growth rate may suggest a weaker local economy in terms of creating jobs and a less attractive location for new employment opportunities as a result of its rural character and proximity to major markets. However, consideration should be given to the types of jobs that are being created – low value/low paying vs. high value/high paying.

In both 2001 and 2006, the region has enjoyed higher participation and employment rates than Southwestern Ontario and the province. This finding holds true for both the population 15 to 24 years and 25 years and over. Of particular interest are the high participation and employment rates for Perth County during the 2001 and 2006 time period.

In 2006, the region had an unemployment rate of 3.7%, which was lower than Southwestern Ontario (5.9%) and Ontario (6.4%). The low unemployment rate for the region mixed with high participation rates suggests a tightening labour market where there may be fewer candidates to fill available employment opportunities. Recent weak economic conditions since 2006 have contributed to higher unemployment rates, with rural areas and small cities being no exception. It is estimated that by 2009, the region's labour force has grown by approximately 750 people and unemployment has increased to 6.1%. While high, unemployment rates at the provincial level have been even higher. This suggests that the region has not been as badly impacted by the loss of manufacturing, as other parts of the province.

Figure 11 – Labour Force Profile Comparison, 2001, 2006 and 2009

	Perth County			St. Marys			Stratford			Region			Southwestern Ontario		Ontario	
	2009	2006	2001	2009	2006	2001	2009	2006	2001	2009	2006	2001	2006	2001	2006	2001
Total population 15 years and over by labour force activity	29,109	28,890	28,530	5,503	5,310	4,815	26,218	24,750	23,670	60,829	58,950	57,015	1,962,990	1,831,220	9,819,420	9,048,040
In the labour force	21,382	21,735	21,540	3,721	3,600	3,270	18,175	17,180	16,645	43,278	42,515	41,455	1,333,030	1,247,670	6,587,575	6,086,815
Employed	20,554	21,170	20,890	3,439	3,460	3,165	16,640	16,320	15,840	40,632	40,950	39,895	1,254,265	1,175,790	6,164,245	5,713,900
Unemployed	829	560	655	282	140	105	1,535	865	805	2,646	1,565	1,565	78,755	71,860	423,335	372,915
Not in the labour force	7,727	7,155	7,000	1,782	1,710	1,540	8,043	7,570	7,025	17,552	16,435	15,565	629,950	583,565	3,231,840	2,961,220
Participation rate	73.5	75.2	75.5	67.6	67.8	67.9	69.3	69.4	70.3	71.1	72.1	72.7	67.9	68.1	67.1	67.3
Employment rate	70.6	73.3	73.2	62.5	65.2	65.7	63.5	65.9	66.9	66.8	69.5	70.0	63.9	64.2	62.8	63.2
Unemployment rate	3.9	2.6	3.0	7.6	3.9	3.2	8.4	5.0	4.8	6.1	3.7	3.8	5.9	5.8	6.4	6.1
Population 15 to 24 years - Labour force activity	5,442	5,620	5,620	889	840	770	4,007	3,880	3,905	10,338	10,340	10,295	339,130	316,090	1,624,835	1,479,675
In the labour force	4,332	4,475	4,475	745	655	630	3,147	2,995	3,215	8,225	8,125	8,320	241,545	226,200	1,059,355	982,185
Employed	3,984	4,170	4,170	607	575	570	2,739	2,675	2,840	7,330	7,420	7,580	210,020	198,325	905,425	855,000
Unemployed	348	305	305	139	75	60	408	320	380	895	700	745	31,510	27,875	153,935	127,185
Not in the labour force	1,110	1,140	1,140	144	190	135	859	885	685	2,113	2,215	1,960	97,575	89,885	565,475	497,495
Participation rate	79.6	79.6	79.6	83.8	78.0	81.8	78.5	77.2	82.3	79.6	78.6	80.8	71.2	71.6	65.2	66.4
Employment rate	73.2	74.2	74.2	68.2	68.5	74.0	68.4	68.9	72.7	70.9	71.8	73.6	61.9	62.7	55.7	57.8
Unemployment rate	8.0	6.8	6.8	18.6	11.5	9.5	13.0	10.7	11.8	10.9	8.6	9.0	13.0	12.3	14.5	12.9
Population 25 years and over - Labour force activity	23,667	22,925	46,592	4,614	4,470	4,045	22,211	20,870	19,770	50,491	48,265	70,407	1,623,850	1,515,115	8,194,585	7,568,360
In the labour force	17,050	17,065	34,115	2,976	2,950	2,640	15,027	14,185	13,430	35,053	34,200	50,185	1,091,485	1,021,445	5,528,220	5,104,635
Employed	16,569	16,715	33,284	2,832	2,885	2,595	13,901	13,645	13,000	33,302	33,245	48,879	1,044,230	977,465	5,258,825	4,858,900
Unemployed	480	350	830	144	60	45	1,126	540	425	1,751	950	1,300	47,240	43,980	269,395	245,730
Not in the labour force	6,617	5,855	12,472	1,638	1,520	1,400	7,184	6,685	6,340	15,438	14,060	20,212	532,365	493,665	2,666,365	2,463,725
Participation rate	72.0	74.4	73.2	64.5	66.0	65.3	67.7	68.0	67.9	69.4	70.9	71.3	67.2	67.4	67.5	67.4
Employment rate	70.0	72.9	71.4	61.4	64.5	64.2	62.6	65.4	65.8	66.0	68.9	69.4	64.3	64.5	64.2	64.2
Unemployment rate	2.8	2.1	2.4	4.8	2.0	1.7	7.5	3.8	3.2	5.0	2.8	2.6	4.3	4.3	4.9	4.8

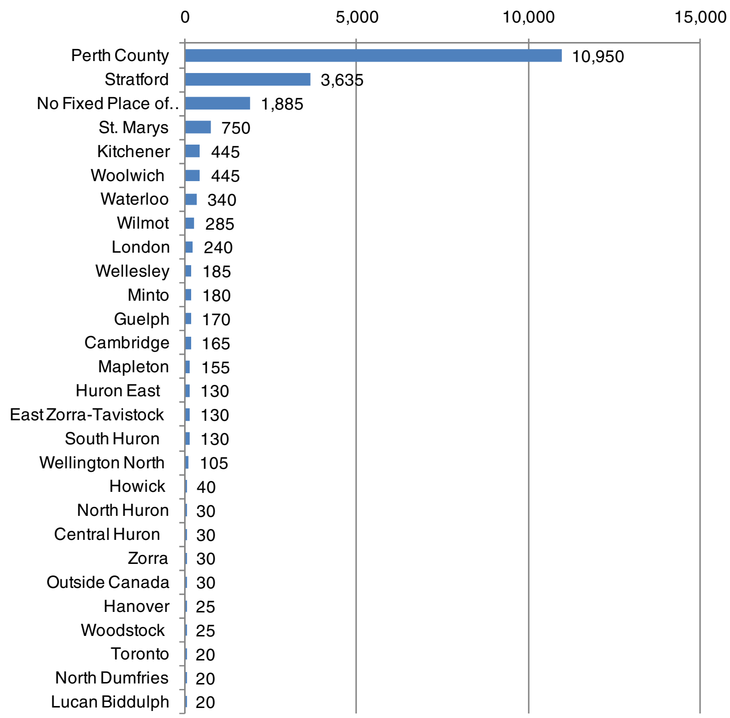
Source: Statistics Canada, Census of Population, 2006, Manifold Data Mining Inc., 2009.

2.2.1 Labour Force by Place of Work

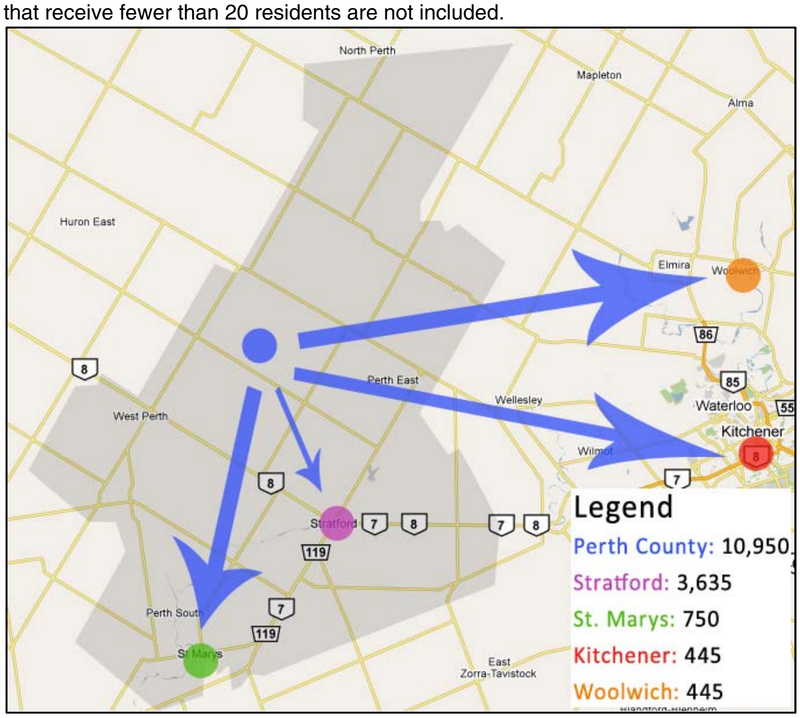
Participation and employment rates consider the resident workforce, but do not provide an indication of where these workers are employed. Based on the results of the place of work data provided by Statistics Canada (2006) the majority of residents work within the region. In Perth County, 10,950 people are employed in jobs in the County with an additional 3,635 people employed in Stratford and 750 people employed in St. Marys. (See Figure 12). In St. Marys, 2,100 people are employed in jobs in the Town with an additional 535 people commuting to Stratford for employment. (See Figure 13). A total of 235 residents commute to London for employment. Stratford is a clear employment centre for the residents. A total of 12,270 residents fill jobs in the city. Six hundred seventy (670) Stratford residents fill jobs in

Perth County and 390 residents fill jobs in Kitchener. (See Figure 14). These statistics indicate low levels of out-commuting in the region and a strong connection with the Kitchener-Waterloo region.

Figure 12 - Where Perth County Residents Work, 2006*

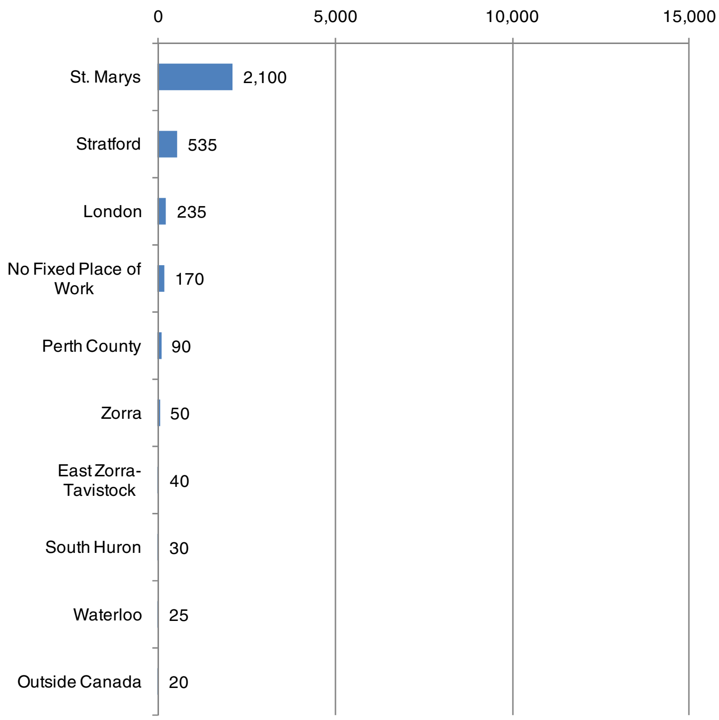


* Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 individuals, so Census subdivisions that receive fewer than 20 residents are not included.

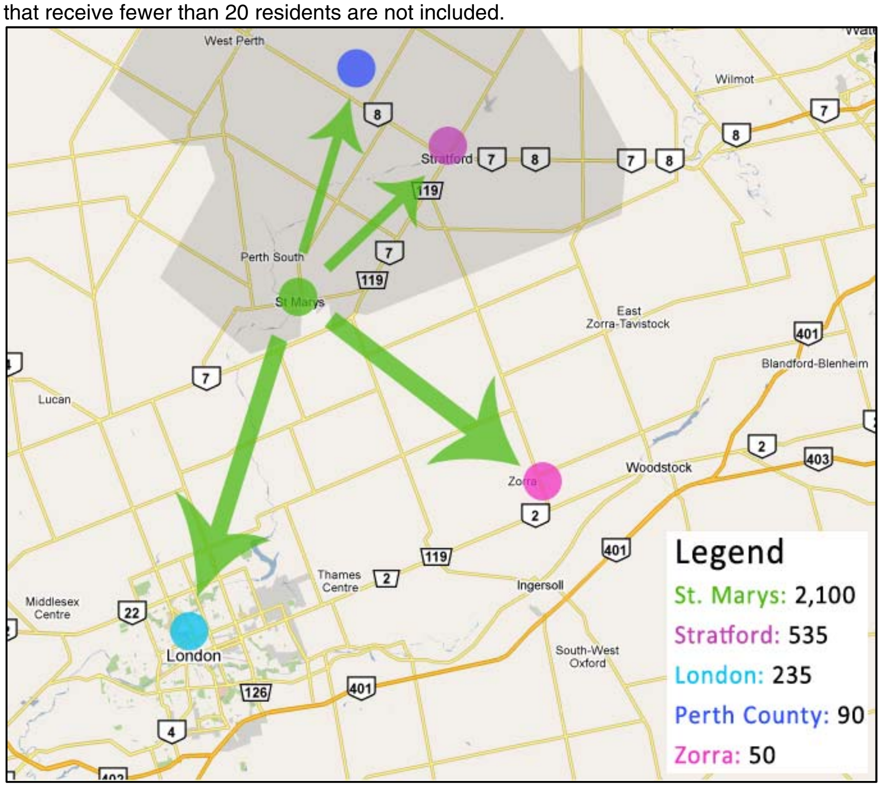


Note: The Perth County political boundary is approximate.
Source: Google Base Map, 2009, Statistics Canada, 2006 Census of Population

Figure 13 - Where St. Marys Residents Work, 2006*

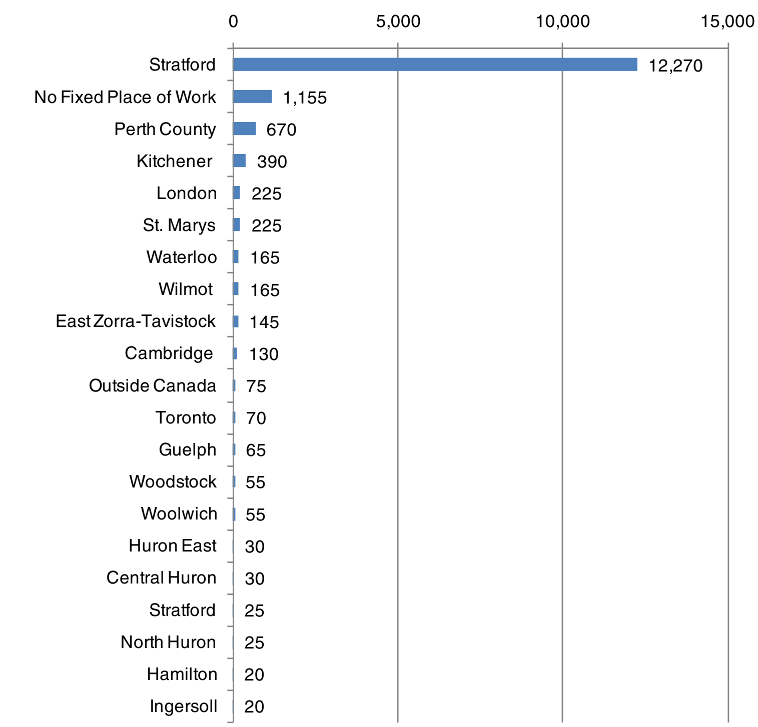


* Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 individuals, so Census subdivisions that receive fewer than 20 residents are not included.

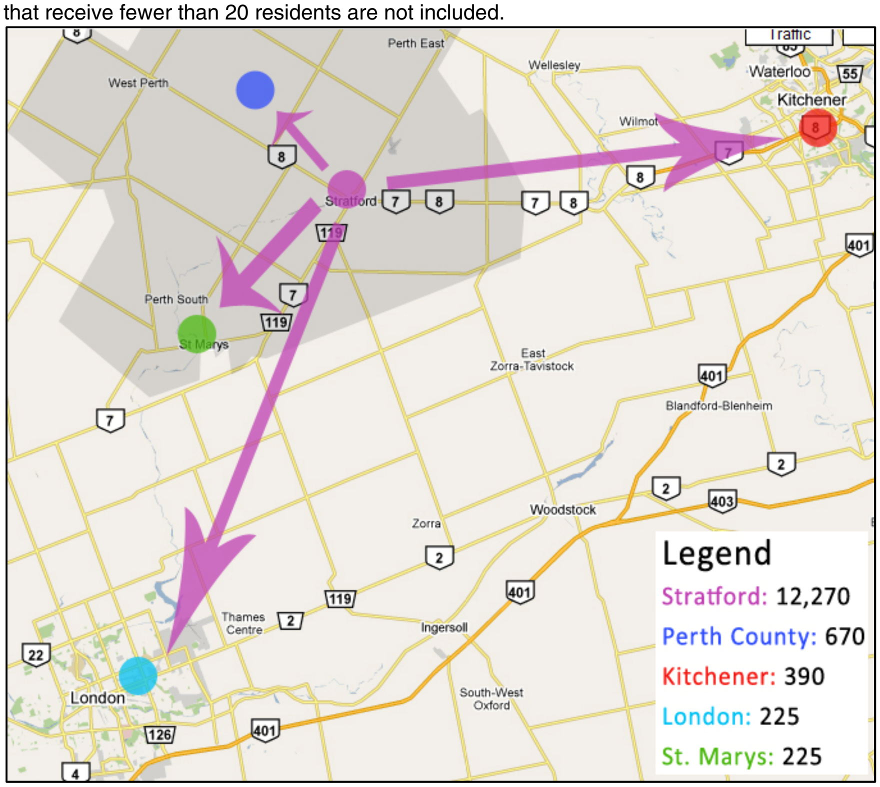


Note: The Perth County political boundary is approximate.
Source: Google Base Map, 2009, Statistics Canada, 2006 Census of Population

Figure 14 - Where Stratford Residents Work, 2006*

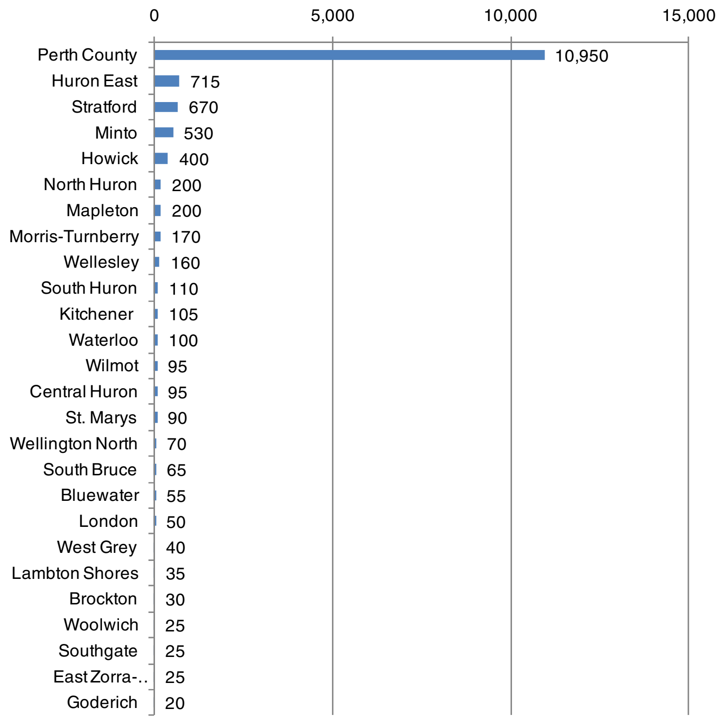


* Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 individuals, so Census subdivisions that receive fewer than 20 residents are not included.

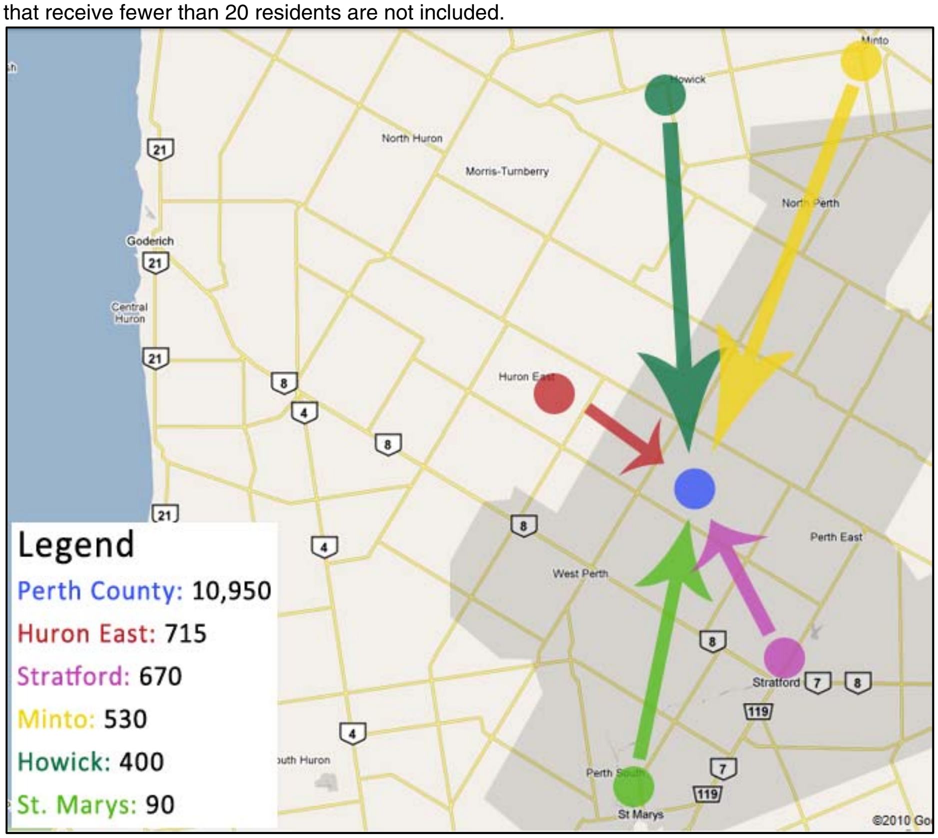


Note: The Perth County political boundary is approximate.
Source: Google Base Map, 2009, Statistics Canada, 2006 Census of Population

Figure 15 – Where Perth County Jobs are Being Filled, 2006*

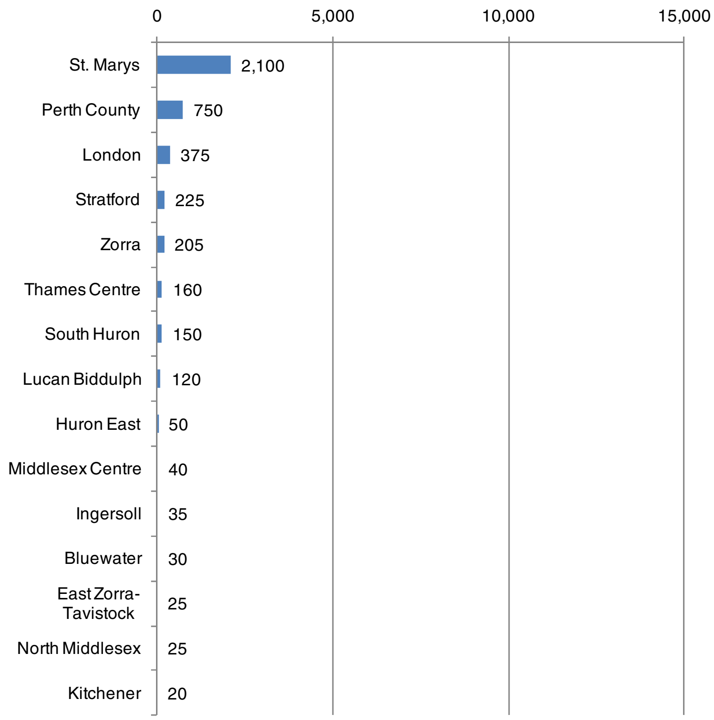


*Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 individuals, so Census subdivisions that receive fewer than 20 residents are not included.

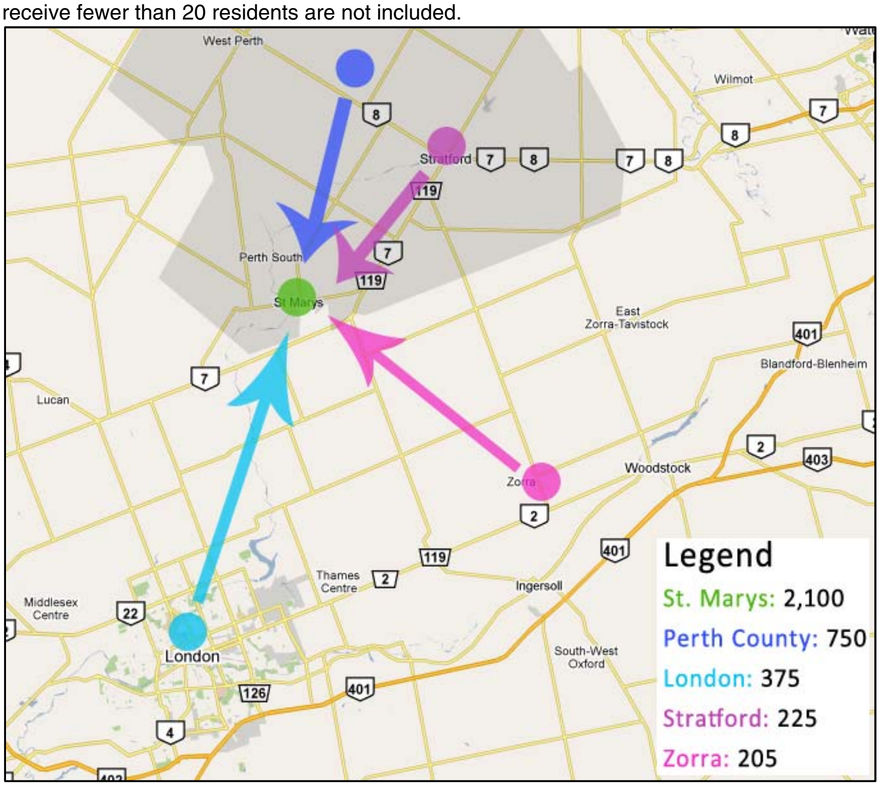


Note: The Perth County political boundary is approximate.
Source: Google Base Map, 2009, Statistics Canada, 2006 Census of Population

Figure 16 – Where St. Marys Jobs are Being Filled, 2006*

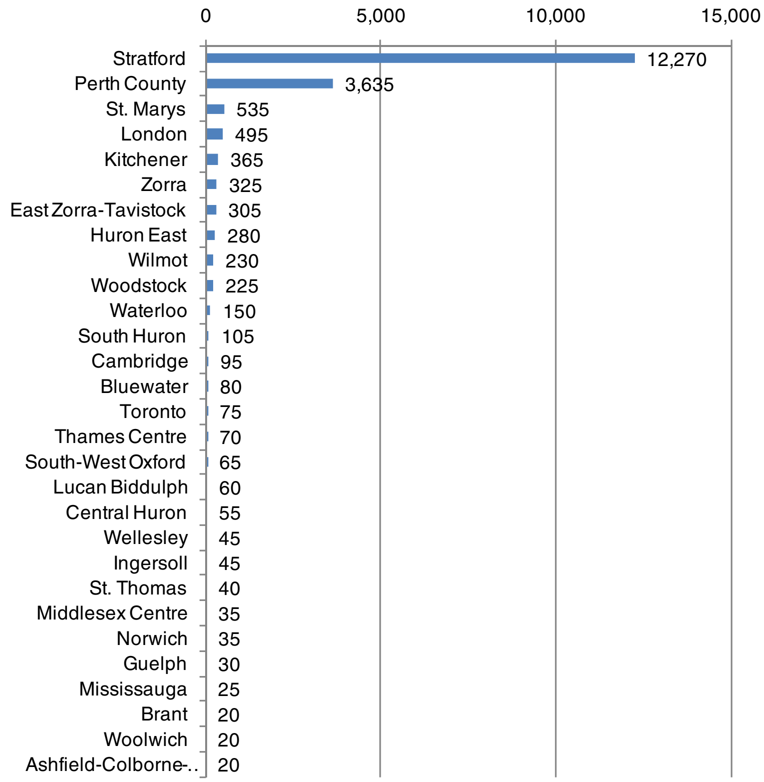


Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 individuals, so Census subdivisions that receive fewer than 20 residents are not included.

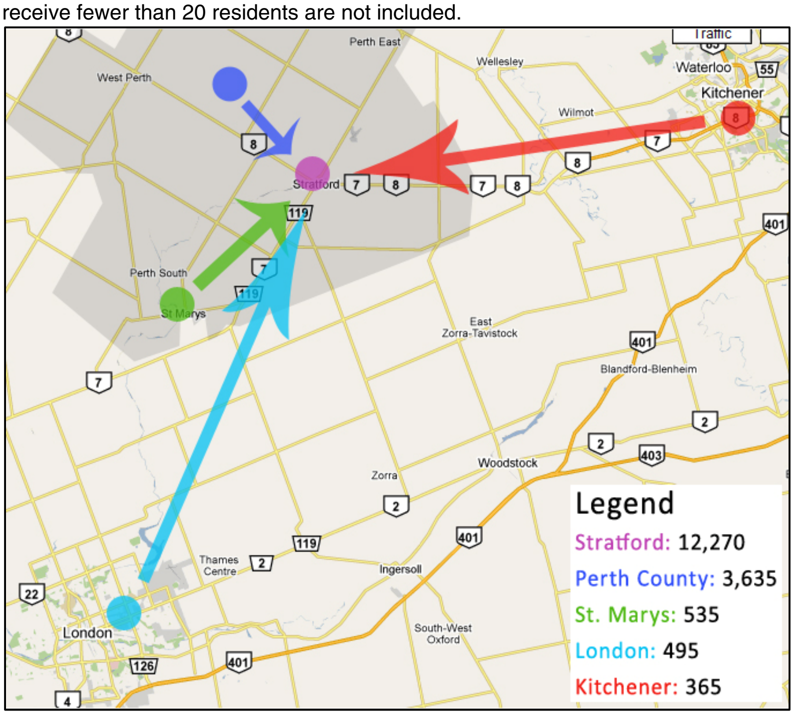


Note: The Perth County political boundary is approximate.
Source: Google Base Map, 2009, Statistics Canada, 2006 Census of Population

Figure 17 – Where Stratford Jobs are Being Filled, 2006*



Note: Statistics Canada suppresses commuting data when the commuting flow is below 20 individuals, so Census subdivisions that receive fewer than 20 residents are not included.



Note: The Perth County political boundary is approximate.
Source: Google Base Map, 2009, Statistics Canada, 2006 Census of Population

Conversely, in Perth County 715 jobs are filled by Huron East residents and 670 jobs are filled by Stratford residents. (See Figure 15). A review of the municipalities listed indicates that Perth County is a small employment centre. The results for St. Marys indicate that the town is a small employment draw. A total of 750 jobs are filled by Perth County residents and 375 jobs are filled by London residents. (See Figure 16). Stratford serves as a regional employment centre attracting 3,635 Perth County residents and 535 St. Marys residents to fill jobs in the city.(See Figure 17).

The high numbers of resident workers creates an opportunity from a skills development perspective as there is less reliance on workers from outside of the area. If a higher percentage of workers were commuting in from other areas, the effect of a local skills development programs might be diluted. When thinking of the entire local labour force it is also important to consider the workers commuting to the region as an indicator of the larger labour pool available to local business.

2.2.2 Labour Force by Occupation

In economic development, the labour force is often assessed on both an industry level using the North American Industrial Classification System and by occupation using the National Occupational Code System devised by Statistics Canada. (Refer to Appendix I). Frequently, industrial classifications are favoured in understanding synergies and economies of scale created with the clustering of industries in a specific location. However, looking at occupations can be equally, if not more, valuable as it speaks to the skills capacity of the local workforce. Occupational assessments reveal clusters of the type of work being done and the skills available in the local workforce with which to attract new businesses. As an example, we may find that in manufacturing there are workers engaged in science occupations with skills suited for other industries.

Figure 18 provides a profile of the concentration of the labour force by occupation for Perth County, St. Marys and Stratford in 2001 and 2006. Areas of high labour force concentration include:

- Sales and service occupations (22.0%)
- Trades, transport and equipment operators and related occupations (17.2%)
- Business, finance and administration occupations (14.6%) and
- Occupations unique to processing, manufacturing and utilities (13.0%).

Figure 18 – All occupations over 15 years of age, 2001-2009

Perth County, St. Marys and Stratford	2009 Number	2009 % of Total	2006 Number	2006 % of Total	2001 Number	2001 % of Total	2001-2009 Number	2001-2009 % Increase/ Decrease	2006-2009 Number	2006-2009 % Increase/ Decrease
All occupations	42,983	100.0%	42,215	100.0%	41,130	100.0%	1,853	4.5%	768	1.8%
A Management occupations	3,418	8.0%	3,325	7.9%	3,280	8.0%	138	4.2%	93	2.8%
B Business, finance and administration occupations	6,233	14.5%	6,155	14.6%	5,455	13.3%	778	14.3%	78	1.3%
C Natural and applied sciences and related occupations	1,226	2.9%	1,275	3.0%	1,370	3.3%	-144	-10.5%	-49	-3.9%
D Health occupations	2,094	4.9%	2,080	4.9%	1,915	4.7%	179	9.3%	14	0.7%
E Occupations in social science, education, government service and religion	2,421	5.6%	2,280	5.4%	1,985	4.8%	436	22.0%	141	6.2%
F Occupations in art, culture, recreation and sport	972	2.3%	1,000	2.4%	895	2.2%	77	8.6%	-28	-2.8%
G Sales and service occupations	9,482	22.1%	9,280	22.0%	8,520	20.7%	962	11.3%	202	2.2%
H Trades, transport and equipment operators and related occupations	7,431	17.3%	7,270	17.2%	7,140	17.4%	291	4.1%	161	2.2%
I Occupations unique to primary industry	4,007	9.3%	4,015	9.5%	4,555	11.1%	-548	-12.0%	-8	-0.2%
J Occupations unique to processing, manufacturing and utilities	5,699	13.3%	5,500	13.0%	6,005	14.6%	-306	-5.1%	199	3.6%

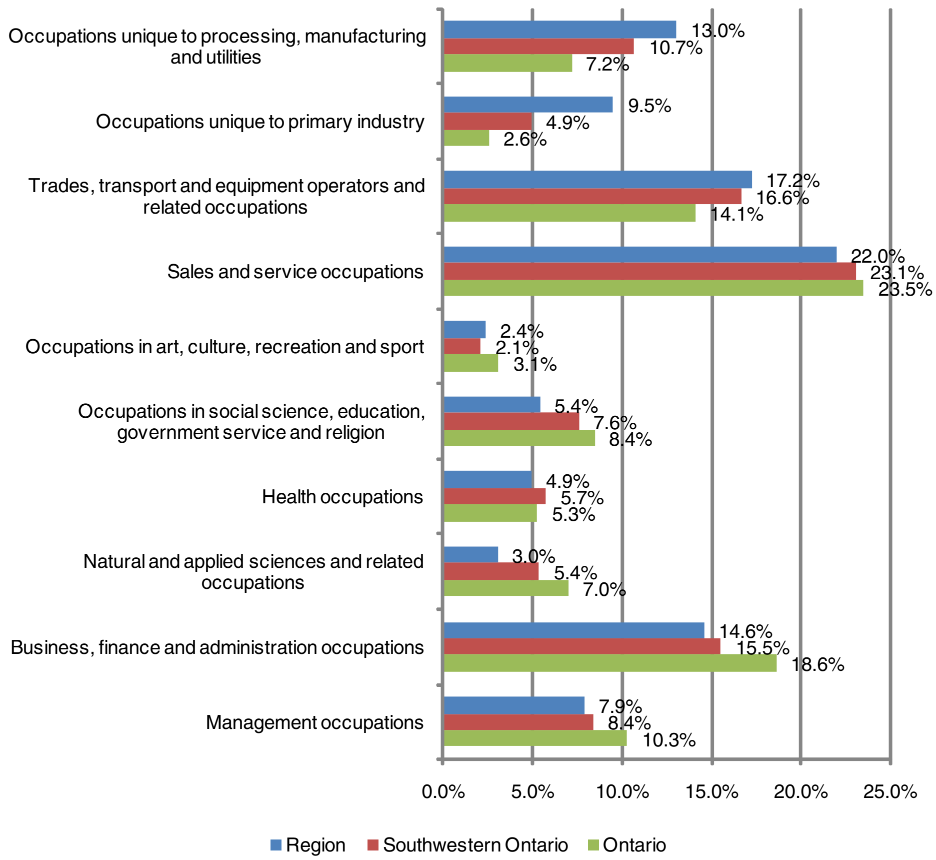
Source: Statistics Canada, Census of Population, 2006, Manifold Data Mining Inc., 2009.

Figure 18 also includes projections for 2009. These projections show the continued importance of the same occupations with each exhibiting growth to 2009. The number of additional people in the labour force is projected to increase by 768 (1.8%) over three years. The largest increase of occupations are in sales and service occupations (202), occupations unique to processing, manufacturing and utilities (199) and trades, transport and equipment operators occupations (161). The largest percentage of increase over the three year time period is projected to be occupations in social science, education, government service and religion (6.2%) and occupations unique to processing, manufacturing and utilities (3.6%). Over the eight-year time period, the largest percentage increases are in occupations in social science, education, government and religion (22.0%) and business finance and administration (14.3%).

Figure 19 compares the region's areas of concentration to Southwestern Ontario and the province. There are notable differences in the percentages engaged in these occupations. The region has a much higher dependency on trades, transport and equipment operators, occupations unique to processing, manufacturing, utilities and primary industry and a much lower concentration in business, finance and administration and natural and applied sciences. The figure indicates that there is a heavy concentration of processing, manufacturing and primary industries (i.e. farming) in the area. Occupations in this area are much higher than Southwestern Ontario and the province. The recent downturn in the manufacturing sector along with fluctuation in agricultural commodity prices however is proof of the risks evident with heavy occupational concentration.

The range of specific occupations will be examined within these broad categories to identify available skills for business growth as well as the skills gap that might be holding back business and economic growth.

Figure 19 – Employment Share by Occupations over 15 years of age, 2006



Source: Statistics Canada, Census of Population, 2006.

Figure 20 compares the pattern of employment by occupation between men and women in the region to Southwestern Ontario and Ontario. There are large differences in many of the occupation classifications. The largest gender difference is in trades, transport and equipment operators with 30.1% of the male population over 15 years of age employed in this occupation, compared to 3.0% for females. Southwestern Ontario and Ontario also have large percentages of males and a small percentage of females employed in this occupation group. The region has large percentages of male residents employed in sales and service occupations (15.2%) and occupations unique to processing, manufacturing and utilities (14.8%), which was similar to Southwestern Ontario occupational trends. Among the female residents, the two largest occupational groups were sales and service (29.6%) and business, finance and administration (22.5%), similar to Southwestern Ontario and Ontario.

The region's two occupational classifications that had strikingly higher proportions than Southwestern Ontario and Ontario were males and females employed in occupations unique to primary industry and processing, manufacturing and utilities.

Figure 20 – All occupations over 15 years of age, 2006

	Perth County, St. Marys and Stratford		Southwestern Ontario		Ontario	
	Male	Female	Male	Female	Male	Female
All occupations	22,205	19,990	694,300	619,865	3,385,880	3,087,845
A Management occupations	9.3%	6.4%	9.9%	6.6%	12.4%	8.0%
B Business, finance and administration occupations	7.4%	22.5%	7.6%	24.4%	10.6%	27.3%
C Natural and applied sciences and related occupations	4.5%	1.3%	7.9%	2.5%	10.3%	3.3%
D Health occupations	1.1%	9.2%	1.8%	10.2%	2.0%	8.9%
E Occupations in social science, education, government service and religion	2.9%	8.1%	4.5%	11.0%	5.2%	12.0%
F Occupations in art, culture, recreation and sport	2.1%	2.6%	1.6%	2.7%	2.7%	3.6%
G Sales and service occupations	15.2%	29.6%	17.2%	29.6%	19.4%	28.0%
H Trades, transport and equipment operators and related occupations	30.1%	3.0%	29.2%	2.5%	25.0%	2.1%
I Occupations unique to primary industry	12.5%	6.1%	6.8%	2.9%	3.7%	1.3%
J Occupations unique to processing, manufacturing and utilities	14.8%	11.1%	13.4%	7.6%	8.8%	5.4%

Source: Statistics Canada, Census of Population, 2006.

2.2.3 Labour Force by Occupation: Creative Class Industries versus Service, Working and Agricultural Class Industries

In the book *The Rise of the Creative Class*, Professor Richard Florida details the significant societal and economic impact that the creative class of worker is having on both local and international economies and the shifts being made to attract and retain this type of workforce, as more and more economic developers realize the importance of this aspect of a workforce. He defines the creative class as including people in:

- science and engineering
- architecture and design
- education
- arts, music and entertainment.

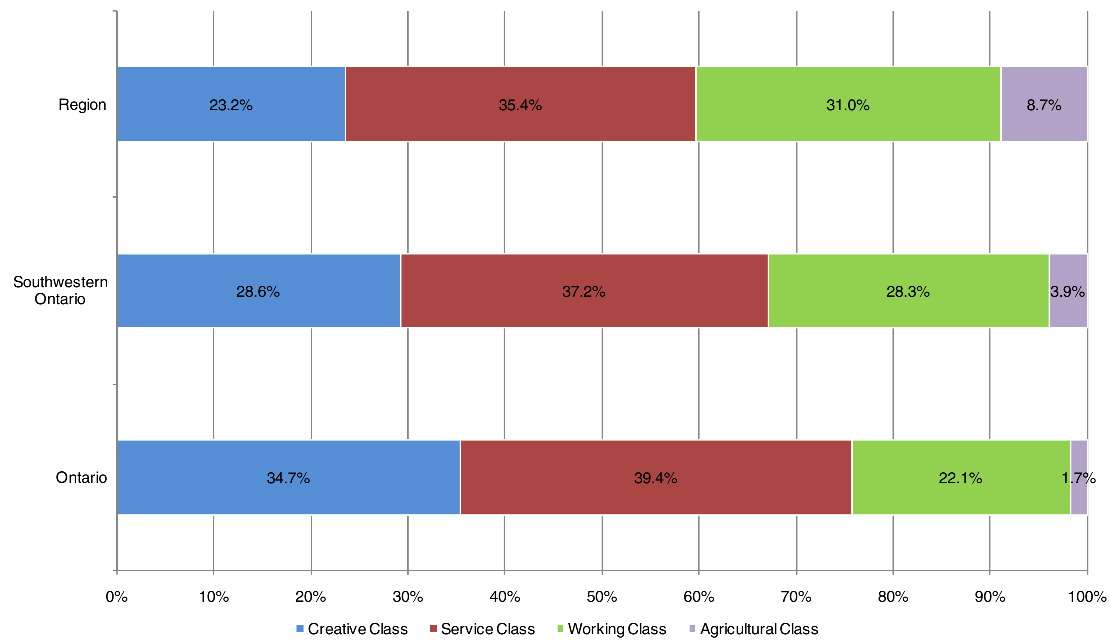
He also includes the broader group of creative professionals in:
- business and finance,
- law, and
- health care and related fields.

The University of Toronto's Martin Prosperity Institute classifies three other occupational categories:
- The Service class (routine-oriented service occupations) is comprised of comprised of occupations in the service sector where workers have lower levels of autonomy than the creative class.
- The Working class (routine-oriented physical occupations) is comprised of occupations that depend on physical skills and repetitive tasks.

- The Agricultural class is similar to the Working Class, but comprised of occupations in fishing, farming and forestry.

Figure 21 shows the percentages of workers in each occupation class for the region compared to Southwestern Ontario and Ontario. As is evident in this figure, the region (23.2%) trails Southwestern Ontario (28.6%) in creative occupations and is significantly behind the province (34.7%). This is due to the region's previously noted heavy concentrations in trades, processing and primary industry occupations. Given the fact that creative occupations are generally higher paying, the area is at risk of falling behind the rest of the province with respect to income levels and wealth generation. The low concentration of creative workers may also challenge the area in supporting and attracting businesses in targeted sectors, which will be further defined in the Regional Economic Development Plan.

Figure 21 – Occupation Class, 2006



Source: Statistics Canada, Census of Population, 2006 using the University of Toronto's Martin Prosperity Institute classification.

Figure 22 highlights the creative occupations in more detail. The creative occupations experiencing the largest growth between 2001 and 2006 include specialist managers and finance and insurance administration occupations. However, other managers not included elsewhere and professional occupations in natural and applied sciences declined. From 2006 to 2009, it is projected that creative occupations have remained relatively stable with a net decrease of 21 workers. The largest increases were in managers in retail trade, food and accommodation services, teachers and professors.

Figure 22 – Creative Employment, 2001 to 2009

Creative Occupations	2009	2006	2001
All Creative Occupations	9,779	9,800	9,370
A0 Senior management occupations	345	330	325
A1 Specialist managers	817	825	680
A2 Managers in retail trade, food and accommodation services	1,335	1,210	1,195
A3 Other managers, n.e.c.	921	950	1,075
B0 Professional occupations in business and finance	494	595	550
B1 Finance and insurance administration occupations	565	615	485
C0 Professional occupations in natural and applied sciences	490	545	630
C1 Technical occupations related to natural and applied sciences	735	745	735
D0 Professional occupations in health	266	295	265
D1 Nurse supervisors and registered nurses	677	675	640
D2 Technical and related occupations in health	415	400	390
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	535	475	450
E1 Teachers and professors	1,213	1,125	1,055
F0 Professional occupations in art and culture	403	440	385
F1 Technical occupations in art, culture, recreation and sport	569	575	510

Source: Statistics Canada, Census of Population, 2006, Data Mining Inc., 2009 using the University of Toronto's Martin Prosperity Institute classification.

The stable labour force in creative occupations suggests that labour force growth has been driven by others outside the creative class. As Figure 23 indicates a large part of labour force growth has been driven by service employment, which are typically lower paying positions. In 2006, service occupations accounted for 14,925 people in the labour force. By 2009, service occupations increased to 15,393 (+468 occupations). The top three types of service occupations are clerical (3,714), sales and service, n.e.c.[3] (3,553) and retail salespersons and sales clerks (1,783). All three of these occupation types have grown over the eight year time period. Occupations that have shown strong growth over the eight year time period were chefs and cooks (460 in 2001 to 642 by 2009), cashiers (440 in 2001 to 597 by 2009) and occupations in travel and accommodation (155 in 2001 to 215 by 2009).

[3] Sales and service, n.e.c. occupations include hairstylists, funeral directors, cleaners, butchers, food service attendants, service station attendants, dry cleaning occupations, etc.

Figure 23 – Service Employment, 2001 to 2009

Service Occupations	2009	2006	2001
All Service Occupations	15,393	14,925	13,555
B2 Secretaries	715	670	875
B3 Administrative and regulatory occupations	588	580	420
B4 Clerical supervisors	156	155	140
B5 Clerical occupations	3,714	3,545	2,980
D3 Assisting occupations in support of health services	737	710	620
G0 Sales and service supervisors	309	380	205
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	724	690	795
G2 Retail salespersons and sales clerks	1,783	1,755	1,325
G3 Cashiers	597	500	440
G4 Chefs and cooks	642	640	460
G5 Occupations in food and beverage service	550	570	745
G6 Occupations in protective services	353	330	360
G7 Occupations in travel and accommodation, including attendants in recreation and sport	215	175	155
G8 Child care and home support workers	757	730	685
G9 Sales and service occupations, n.e.c.	3,553	3,495	3,350

Source: Statistics Canada, Census of Population, 2006, Data Mining Inc., 2009 using the University of Toronto's Martin Prosperity Institute classification.

The working class labour force is the second largest type of labour in the region with 13,444 people occupying these types of jobs in 2009. (See Figure 24). The largest occupational groups were machine operators in manufacturing (2,034), assemblers in manufacturing (1,992) and transportation equipment operators (1,772). Over the eight year period, there has been an increase of 44 people in the working class labour force. The largest growth has been in construction trades (730 in 2001 to 937 by 2009) and stationary engineers, power station operators and electrical trades (450 in 2001 to 513 by 2009). It was projected that there was also labour force growth in assemblers in manufacturing; however, growth over the previous three years is significantly less.

Figure 24 – Working Class Employment, 2001 to 2009

Working Class Occupations	2009	2006	2001
All Working Class Occupations	13,444	13,090	13,400
H0 Contractors and supervisors in trades and transportation	346	315	370
H1 Construction trades	937	910	730
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	513	495	450
H3 Machinists, metal forming, shaping and erecting occupations	882	855	940
H4 Mechanics	1,272	1,205	1,205
H5 Other trades, n.e.c.	242	325	420
H6 Heavy equipment and crane operators, including drillers	227	240	250
H7 Transportation equipment operators and related workers, excluding labourers	1,772	1,720	1,625
H8 Trades helpers, construction and transportation labourers and related occupations	1,240	1,185	1,125
I2 Primary production labourers	314	345	280
J0 Supervisors in manufacturing	313	315	325
J1 Machine operators in manufacturing	2,034	1,950	2,465
J2 Assemblers in manufacturing	1,992	1,915	1,625
J3 Labourers in processing, manufacturing and utilities	1,360	1,315	1,590

Source: Statistics Canada, Census of Population, 2006, Data Mining Inc., 2009 using the University of Toronto's Martin Prosperity Institute classification.

The labour force in agricultural occupations has declined from 4,275 in 2001 to 3,693 by 2009; however the occupations have increased slightly over the previous three years. (See Figure 25).

Figure 25 – Agricultural Employment, 2001 to 2009

Agricultural Occupations	2009	2006	2001
All Agricultural Occupations	3,693	3,665	4,275
I0 Occupations unique to agriculture, excluding labourers	3,633	3,645	4,265
I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers	61	20	10

Source: Statistics Canada, Census of Population, 2006, Data Mining Inc., 2009 using the University of Toronto's Martin Prosperity Institute classification.

2.2.4 Labour Force by Industry

Notwithstanding the importance of understanding region's occupational characteristics, it is also important to look at the local labour force characteristics by industry. Figure 26 shows the actual labour force employment by industry for 2001 and 2006 as well as the projected employment by industry for 2009. (Refer to Appendix II for industry definitions).

The region continued to shed jobs in agriculture, forestry, fishing and hunting and manufacturing industries during the period 2001 to 2006. In 2009, the labour force in the agriculture industry is projected to have further declined to 3,584 (from 4,100 people in 2006) and the manufacturing industry is projected to have increased to 9,397 (from 9,285 people in 2006). The manufacturing industry remains the largest source of employment for the labour force with over twice as many people as the next largest industries, retail trade (4,543 people) and health care and social assistance (4,543 people). With the rising dollar and a global downturn in the economy impacting the goods producing sectors this puts the local economy at risk for job losses and family and business income losses. In addition, the provincial automotive parts manufacturing and assembly sector has been hard hit with layoffs, closures and over capacity. Stratford, St. Marys and Perth County have not been spared by sector restructuring.

Figure 26 also illustrates the change in employment from 2001 to 2009 and the estimated change from 2006 to 2009. Industries that have maintained strong growth rates since 2001 include:

- Real estate and rental and leasing (59.4% since 2001 and 15.3% since 2006);
- Wholesale trade (30.4% since 2001);
- Health care and social assistance (26.5% since 2001 and 14.0% since 2006); and
- Construction (20.6% since 2001 and 10.8% since 2006).

The recent announcements of Erie Meats re-commissioning of the former Campbell's Soup plant in Listowel for full production and RBC Financial developing a data centre in Stratford point to the potential for job retention and investmenr attraction for the region in the future.

Figure 26 – Labour Force by Industry, 2001-2009

Perth County, St. Marys and Stratford	2009		2006		2001		2001-2009		2006-2009	
	Number	% of Total	Number	% of Total	Number	% of Total	Number	% Increase/ Decrease	Number	% Increase/ Decrease
All industries	42,965	100.0%	42,205	100.0%	41,130	100.0%	1,835	4.5%	760	1.8%
11 Agriculture, forestry, fishing and hunting	3,584	8.3%	4,100	9.7%	4,390	10.7%	-806	-18.4%	-516	-12.6%
21 Mining and oil and gas extraction	64	0.1%	65	0.2%	50	0.1%	14	27.0%	-1	0.0%
22 Utilities	133	0.3%	110	0.3%	135	0.3%	-2	-1.6%	23	20.7%
23 Construction	2,998	7.0%	2,705	6.4%	2,485	6.0%	513	20.6%	293	10.8%
31-33 Manufacturing	9,397	21.9%	9,285	22.0%	10,290	25.0%	-893	-8.7%	112	1.2%
41 Wholesale trade	2,237	5.2%	2,220	5.3%	1,715	4.2%	522	30.4%	17	0.8%
44-45 Retail trade	4,543	10.6%	4,345	10.3%	4,195	10.2%	348	8.3%	198	4.6%
48-49 Transportation and warehousing	1,827	4.3%	1,900	4.5%	1,630	4.0%	197	12.1%	-73	-3.9%
51 Information and cultural industries	396	0.9%	415	1.0%	410	1.0%	-14	-3.5%	-19	-4.7%
52 Finance and insurance	1,448	3.4%	1,500	3.6%	1,475	3.6%	-27	-1.9%	-52	-3.5%
53 Real estate and rental and leasing	542	1.3%	470	1.1%	340	0.8%	202	59.4%	72	15.3%
54 Professional, scientific and technical services	1,407	3.3%	1,270	3.0%	1,275	3.1%	132	10.4%	137	10.8%
55 Management of companies and enterprises	54	0.1%	40	0.1%	30	0.1%	24	80.4%	14	35.3%
56 Administrative and support, waste management and remediation services	969	2.3%	1,030	2.4%	1,110	2.7%	-141	-12.7%	-61	-5.9%
61 Educational services	2,033	4.7%	1,950	4.6%	1,695	4.1%	338	19.9%	83	4.3%
62 Health care and social assistance	4,543	10.6%	3,985	9.4%	3,590	8.7%	953	26.5%	558	14.0%
71 Arts, entertainment and recreation	1,100	2.6%	1,130	2.7%	1,070	2.6%	30	2.8%	-30	-2.7%
72 Accommodation and food services	2,849	6.6%	2,830	6.7%	2,590	6.3%	259	10.0%	19	0.7%
81 Other services (except public administration)	1,871	4.4%	1,830	4.3%	1,840	4.5%	31	1.7%	41	2.2%
91 Public administration	974	2.3%	950	2.3%	790	1.9%	184	23.3%	24	2.5%

Source: Statistics Canada, Census of Population, 2001 & 2006, Manifold Data Mining Inc., 2009.

2.2.5 Wage Rate and Salary Analysis

The Perth County Human Resources Association provided 2010 wage rates and salaries for typical production occupations in the region. The results are highlighted in Figure 27. The wage rate ranges for trades occupations such as electricians and millwrights are from a low of $21.12 to a high of $34.44 per hour. Three typical occupations and wage rates in processing and manufacturing are as follows:

- Lead Hand/ Line Set Up ($21.64 - $28.54 per hour)
- Entry Level Production ($14.14 - $17.67 per hour)
- Entry Level Non-skilled ($14.38 - $18.28 per hour).

Typical management, professional and administrative occupations were also included in the survey. The results from the survey are as follows:

- Production Manager ($61,568 - $105,552 per year)
- Quality Engineer ($46,240 - $84,847 per year)
- Junior Engineer ($38,960 - $87,664 per year)
- Intermediate Engineer ($46,240 - $105,000 per year)
- Senior Engineer ($52,315 - $125,772 per year)
- Administrative Clerk ($26,261 - $41,744 per year).

These wage rates are supported by evidence of the growing level of household wealth in the region, particularly Stratford and St. Marys.

Figure 27 – Wage Rate and Salary Results, 2010

Occupation Group	Occupation	Wage (per hour) Low	Wage (per hour) High
Trades Occupations	Electricians	$ 21.12	$ 34.44
	Millwrights	$ 21.12	$ 34.44
Occupations in Processing and Manufacturing	Lead Hand/ Line Set Up	$ 21.64	$ 28.54
	Entry Level Production	$ 14.14	$ 17.67
	Entry Level Non-skilled	$ 14.38	$ 18.28
		Salary (per year)	
Management and Professional Occupations	Production Manager	$ 61,568	$ 105,552
	Quality Engineer	$ 46,240	$ 84,847
	Junior Engineer	$ 38,960	$ 87,664
	Intermediate Engineer	$ 46,240	$ 105,000
	Senior Engineer	$ 52,315	$ 125,772
Administrative Occupation	Administrative Clerks	$ 26,261	$ 41,744

Source: Perth County Human Resources Association, 2010.

2.3 Business Profile

Statistics Canada's Canadian Business Pattern Data provides a record of the total number of local business establishments by industry and size. Sources of information are from the Statistics Canada survey program and the Business Number registration which is collected from the Canada Revenue Agency (CRA). The business data collected includes all local business which meets at least one of the three following criteria:

1. Have an employee workforce for which they submit payroll remittances to CRA; or
2. Have a minimum of $30,000 in annual sales revenue; or
3. Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by "Total", "Indeterminate", and "Subtotal categories". The establishments in the "Indeterminate" category include the self-employed and cottage industries, (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). A review of the results provides an understanding of the business growth or decline by NAICS codes, the size of operations in terms of the number of employees and the historical performance of the sector over the period 2003 to 2009.

Figure 28 highlights the number of businesses in each industry category (NAICS) for the region. Of the 6,847 business establishments, 2,211 of these establishments are in the agriculture, forestry, fishing and hunting industry, a 7.0% increase over the previous six years. A total of 1,817 of these businesses were categorized as Indeterminate, an increase from 1,670 in June 2003. The following four industries recording the largest number of establishments include:

- Construction (694 establishments);
- Retail trade (561 establishments);
- Real estate and rental and leasing (434 establishments);
- Other services (except public administration) (412 establishments).

These four industries remained the largest industries in term of number of business establishments from 2003 to 2009. The highest rates of business growth during this time period were in:

- Educational services (61.3%);
- Finance and insurance (37.2%);
- Information and cultural industries (30.2%); and
- Health care and social assistance (25.4%).[4]

When the Indeterminate category is removed the fastest growing industries include:

- Arts, entertainment and recreation (70.8%);
- Educational services (33.3%);
- Health care and social assistance (18.2%); and
- Administrative and support, waste management and remediation services (14.8%).

Figure 28 - Number of Business Establishments by Industry, Perth County, Town of St. Marys and City of Stratford, June 2003 and 2009

Time Period	June 2009			June 2003			% Increase from June 2003 to 2009		
Industry (NAICS)	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal
All Industries	6,847	4,077	2,770	6,385	3,743	2,642	7.2%	8.9%	4.8%
11 Agriculture, forestry, fishing and hunting	2,211	1,817	394	2,067	1,670	397	7.0%	8.8%	-0.8%
21 Mining and oil and gas extraction	11	0	11	3	1	2	266.7%	-100.0%	450.0%
22 Utilities	9	2	7	8	0	8	12.5%	0.0%	-12.5%
23 Construction	694	316	378	660	327	333	5.2%	-3.4%	13.5%
31-33 Manufacturing	286	96	190	288	107	181	-0.7%	-10.3%	5.0%
41 Wholesale trade	225	96	129	242	91	151	-7.0%	5.5%	-14.6%
44-45 Retail trade	561	187	374	576	215	361	-2.6%	-13.0%	3.6%
48-49 Transportation and warehousing	282	171	111	267	156	111	5.6%	9.6%	0.0%
51 Information and cultural industries	56	37	19	43	24	19	30.2%	54.2%	0.0%
52 Finance and insurance	269	181	88	196	101	95	37.2%	79.2%	-7.4%
53 Real estate and rental and leasing	434	361	73	361	286	75	20.2%	26.2%	-2.7%
54 Professional, scientific and technical services	363	207	156	331	191	140	9.7%	8.4%	11.4%
55 Management of companies and enterprises	182	158	24	132	100	32	37.9%	58.0%	-25.0%
56 Administrative and support, waste management and remediation services	153	60	93	159	78	81	-3.8%	-23.1%	14.8%
61 Educational services	50	26	24	31	13	18	61.3%	100.0%	33.3%
62 Health care and social assistance	257	43	214	205	24	181	25.4%	79.2%	18.2%
71 Arts, entertainment and recreation	146	105	41	140	116	24	4.3%	-9.5%	70.8%
72 Accommodation and food services	239	72	167	263	84	179	-9.1%	-14.3%	-6.7%
81 Other services (except public administration)	412	142	270	397	159	238	3.8%	-10.7%	13.4%
91 Public administration	7	0	7	16	0	16	-56.3%	0.0%	-56.3%

Source: Statistics Canada, Canadian Business Patterns Data, 2003 and 2009

Figure 29 gives more evidence of the importance of small business in the regional economy. Of the 2,770 businesses with employees, 1,394 (50.3%) have 1-4 employees while 630 (22.7%) have 5-9 employees. The remaining 746 (26.9%) have more than 10 employees. When labour force planning strategies are developed, consideration needs to be given to the ability of smaller employers to develop in house training programs and the communication between training providers and small business.

[4] Mining and oil and gas extraction and Management of companies and enterprises also had very high rates of business growth, but were excluded because of small sample size and the nature of the business (i.e. holding companies tend to be shell companies with no employees).

Figure 29 - Business Establishments by Industry and Size, Perth County, Town of St. Marys and City of Stratford, June 2003 and 2009

Time Period	June 2009								
	Perth County, St. Marys and Stratford								
Industry (NAICS)	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
All Industries	2,770	1,394	630	393	216	78	35	18	6
11 Agriculture, forestry, fishing and hunting	394	292	73	25	4	0	0	0	0
21 Mining and oil and gas extraction	11	1	2	7	0	1	0	0	0
22 Utilities	7	2	0	4	1	0	0	0	0
23 Construction	378	200	102	48	23	4	1	0	0
31-33 Manufacturing	190	50	32	32	33	17	11	13	2
41 Wholesale trade	129	41	30	35	18	3	2	0	0
44-45 Retail trade	374	147	112	71	24	12	8	0	0
48-49 Transportation and warehousing	111	54	17	16	19	3	1	1	0
51 Information and cultural industries	19	1	12	0	4	2	0	0	0
52 Finance and insurance	88	35	19	15	16	3	0	0	0
53 Real estate and rental and leasing	73	49	13	8	3	0	0	0	0
54 Professional, scientific and technical services	156	105	28	14	8	1	0	0	0
55 Management of companies and enterprises	24	14	3	2	2	2	1	0	0
56 Administrative and support, waste management and remediation services	93	43	24	17	7	1	0	1	0
61 Educational services	24	12	5	2	4	0	0	0	1
62 Health care and social assistance	214	123	43	18	11	11	5	2	1
71 Arts, entertainment and recreation	41	15	11	5	5	3	1	0	1
72 Accommodation and food services	167	39	30	49	34	12	3	0	0
81 Other services (except public administration)	270	171	74	24	0	1	0	0	0
91 Public administration	7	0	0	1	0	2	2	1	1

Source: Statistics Canada, Canadian Business Patterns Data, 2009

2.4 Local Labour Training Initiatives

There have been several local labour training initiatives in the region. The training initiative that has received a great deal of uptake and funding support is the Technical Training Group. Other training initiatives include the Conestoga College Stratford and Listowel satellite campuses, theatre trades training, culinary trades training and other training initiatives.

2.4.1 Technical Training Group

The Technical Training Group (TTG) is a not-for-profit organization with a volunteer Board of Directors. It receives a majority of its funding from the Ministry of Training, Colleges and Universities. Funding is also provided by the County of Perth, City of Stratford, Perth Community Futures Development Corporation and other government organizations.

Its goal is to offer technical and trades training that is in need by the business community. TTG targets the working population over 18 years of age for training and retraining. TTG's Welder Apprenticeship training program is funded by the Ministry of Training, Colleges and Universities. The Welder program has received a high level of uptake. It draws people from as far away as Grand Bend and Milton. Close to 65 people are currently enrolled in the welding program. Pre-apprentice electrical and plumbing courses are also offered by TTG. Training takes place in the Stratford Northwestern Secondary School and St. Michael's Catholic Secondary School technical facilities.

2.4.2 Conestoga College Stratford and Listowel Satellite Campus

Conestoga College has satellite campuses in Stratford and Listowel. The services offered at these locations are primarily to develop career development/labour adjustment skills (i.e. job findings skills) for displaced workers.

2.4.3 Theatre Trades Training

The Off-the-Wall theatre trades training initiative is intended to develop the skills of prop making. Operating for the last five years, it is located in Factory 163 in Stratford and provides hands on training for artistic welding, mask making, dramatic upholstery and animatronics. This grassroots initiative has received funding from the Ontario Arts Council and the Trillium Foundation. The artistic welding program is limited to five students, but the other programs can accommodate class sizes of up to 15 students.

2.4.4 Culinary Trades Training

The Stratford Chefs School operates out of two restaurants in Stratford. This school follows the Ministry of Training, Colleges and Universities outline of apprenticeship programs training. The two year curriculum covers four core subject areas: food preparation practice, food preparation theory, sanitation, and kitchen management. Approximately 30 students graduate from this chef school each year. Many graduates from this school apply their trade skills in restaurants outside of the region.

Another culinary trades initiative that is being developed is charcuterie and artisanal cheese training. This training program is intended to be open for enrolment in January 2011 with an aim to train 10 people a year. The core subject areas of this program are charcuterie, artisanal cheese, master chef skills and agricultural products and processes. The program will be a two year apprenticeship program and the only one of its kind in Canada.

2.4.5 Other Training Initiatives

The economic development offices, Perth Community Futures and chambers of commerce also provide training workshops for business planning, using social media (ex. Social Media Boot Camp) for business marketing and other relevant topics to develop labour force skills.

3 Summary of Findings and Key Conclusions

3.1 Summary of Findings

Community Demographics and Households

- The region is experiencing modest population growth. The City of Stratford accounts for much of this growth.
- Perth County's population is younger on average than Stratford and St. Marys.
- As compared to the province and southwestern Ontario, the region has a lower percentage of households earning an annual income greater than $100,000. Communities in the region have lower median and average incomes than the province. Disposable income impacts the region's capacity for more retail and personal services businesses.
- The region is not attracting immigrants compared to southwestern Ontario and Ontario. In fact, the visible minority population in the region is actually declining. Given that immigration is the primary source of population and labour force growth in Canada, this will have implications for the region's future labour force.

Labour Force

- The region experiences higher participation rates and lower unemployment rates than southwestern Ontario and Ontario suggesting the region has more successfully weathered the recent economic recession.
- There is a high proportion of residents in the region working in the region (low commuter out flow of labour) creating opportunities for resident, and consequently worker, skills development programs.
- On an occupational level, the region has proportionately more people working in occupations unique to processing, manufacturing and utilities; primary industry (agriculture); and trades, transport and equipment and related occupations. Conversely, the region has proportionally fewer people working in occupations in social science, education, government service and religion; natural and applied sciences and related occupations; business, finance and administration; and management.
- The region has a much lower percentage of the population working in the creative class and much higher percentage of the population in the working class and agricultural class. The majority of the recent labour force growth has been driven by the service class. This reality puts the region at a disadvantage in attracting and developing the creative industries that are predicted to lead economic growth and wealth generation in Ontario.
- The manufacturing sector is the largest employer in the region with double the employees of the next largest employing industry, retail trade. Employment growth, however, is being led by real estate and rental and leasing; wholesale trade; health care and social assistance and construction.
- Typical wage rates for electrical and millwright trades range from $21.12 to $34.44 per hour. Wage rates for occupations in processing and manufacturing range from $21.64 to $28.54 per hour for a Lead Hand/Line Set Up to $14.14 to $17.67 per hour for an entry level production job.

* Ministry of Training, Colleges and Universities funds training initiatives in the region such as the Technical Training Group (e.g. Welding apprenticeships and pre-apprenticeship plumbing and electrical courses) and Conestoga College satellite campuses(e.g. Displaced worker job finding skills). In addition, post-secondary education programs have been developed for theatre trades and culinary trades.

Education

* The region has comparatively low levels of educational achievement as measured by the percentage of the population have attained some form of post-secondary education. However, the region performs well with respect to percentage of the population with an apprenticeship or college diploma.
* The proximity to several colleges and universities in the broader region facilitates both the local populations' access to education as well as the region's ability to attract skilled workers.
* The region has a comparatively high rate of workers with education in architecture, engineering and related technologies as well as health, parks, recreation and fitness.
* Unique trades training opportunities in theatre and the performing arts and and culinary industries.

Recent Economic Activity

* The region has recently attracted the University of Waterloo's Stratford Institute for Digital Media.
* Erie Meats has re-commissioned the former Campbell's Soup plant in Listowel for full production.
* RBC Financial is developing a data centre in Stratford.
* While the largest number of business establishments are in agriculture, forestry, fishing and hunting; construction; and retail trade; the industries with the fastest growth in establishments are educational services; finance and insurance; and information and cultural industries.
* Provincially, the automotive parts manufacturing and assembly sector has been hard hit with layoffs, closures and over capacity. Stratford, St. Marys and Perth County have not been spared from these sector trends.
* Small business is important to the regional economy. Of the businesses with employees, 50.3% have 1-4 employees and 22.7% have 5-9 employees. The remaining 26.9% of business establishments have more than 10 employees.

3.2 Key Conclusions

Considerations and opportunities to build and strengthen the labour force include:

- The new UW Stratford Institute will draw students to the region. The region must consider opportunities to entice them to stay in the area after graduation.
- Stratford will drive population and labour force growth for the region. Population growth will create opportunities for small business owners/entrepreneurs providing retail and personal services.
- There is a need to provide more local college level education or apprenticeship opportunities. Member municipalities can work with colleges to deliver skills development training programs in the region. Specific training can be provided for agricultural processes, engineering-related technologies and/ or health care services. Regarding health care services, the region should not lose its health care services network. The fact that there was employment growth in health care suggests a growing need.
- Immigrants do not stay in the region. Consideration needs to be given to developing more effective immigration support programs.
- Perth County's creative class is smaller in proportion to the Province. More needs to be done to attract and retain the creative class in the region.
- Consideration needs to be given to the ability of smaller employers to develop in-house training programs as well as work with training providers to develop programs.

Appendix I

National Occupation Classification (NOC) Definitions

National Occupation Classification (NOC) Definitions

Management Occupations

Occupations in this broad occupational category are primarily concerned with carrying out the functions of management by planning, organizing, coordinating, directing, controlling, staffing, and formulating, implementing or enforcing policy, either directly or through other levels of management. Supervising is not considered to be a management function.

Business, Finance and Administrative Occupations

Occupations in this broad occupational category are primarily concerned with providing financial and business services, administrative and regulatory services and clerical support services.

Natural and Applied Sciences and Related Occupations

Occupations in this broad occupational category are primarily concerned with conducting theoretical and applied research and providing technical support in natural and applied sciences.

Health Occupations

Occupations in this broad occupational category are primarily concerned with providing health care services directly to patients and providing support to health care delivery.

Occupations in Social Science, Education, Government Service and Religion

Occupations in this broad occupational category are primarily concerned with law, teaching, counselling, conducting social science research, providing religious services, and developing and administering government policies and programs.

Occupations in Art, Culture, Recreation and Sport

Occupations in this broad occupational category are primarily concerned with providing artistic and cultural services and providing direct support to the service providers.

Sales and Service Occupations

Occupations in this broad occupational category are primarily concerned with selling goods and services and providing personal, protective, household, tourism and hospitality services.

Trades, Transport and Equipment Operators and Related Occupations

Occupations in this broad occupational category are primarily concerned with contracting, supervising and doing trades work; and supervising and operating transportation and heavy equipment.

Occupations Unique to Primary Industry

Occupations in this broad occupational category are primarily concerned with operating farms and supervising or doing farm work; operating fishing vessels and doing specialized fishing work; and in doing supervision and production work in oil and gas production and forestry and logging.

Appendix II

National American Industry Classification System (NAICS) Definitions

North American Industrial Classification System (NAICS)

Sector Definitions

Agriculture, Forestry (NAICS 11)

This sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities.

Establishments primarily engaged in agricultural research or that supply veterinary services are not included in this sector.

Mining and Oil and Gas Extraction (NAICS 21)

This sector comprises establishments primarily engaged in extracting naturally occurring minerals. These can be solids, such as coal and ores; liquids, such as crude petroleum; and gases, such as natural gas.

The term *mining* is used in the broad sense to include quarrying, well operations, milling (for example, crushing, screening, washing, or flotation) and other preparation customarily done at the mine site, or as a part of mining activity.

Establishments engaged in exploration for minerals, development of mineral properties and mining operations are included in this sector. Establishments performing similar activities, on a contract or fee basis, are also included.

Construction (NAICS 23)

This sector comprises establishments primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land. These establishments may operate on their own account or under contract to other establishments or property owners.

Manufacturing (NAICS 31-33)

This sector comprises establishments primarily engaged in the physical or chemical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, in the sense of becoming a raw material for an establishment to use in further manufacturing.

Related activities, such as the assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat-treating, plating and similar operations are also treated as manufacturing activities.

Manufacturing establishments are known by a variety of trade designations, such as plants, factories or mills. Manufacturing establishments may own the materials which they transform or they may transform materials owned by other establishments. Manufacturing may take place in factories or in workers' homes, using either machinery or hand tools.

Wholesale Trade (NAICS 41)

This sector comprises establishments primarily engaged in wholesaling merchandise and providing related logistics, marketing and support services. The wholesaling process is generally an intermediate step in the distribution of merchandise; many wholesalers are therefore organized to sell merchandise in large quantities to retailers, and business and institutional clients. However, some wholesalers, in particular those that supply non-consumer capital goods, sell merchandise in single units to final users.

This sector recognizes two main types of wholesalers, that is, wholesale merchants and wholesale agents and brokers.

Retail Trade (NAICS 44-45)

The retail trade sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The retailing process is the final step in the distribution of merchandise; retailers are therefore organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers, that is, store and non-store retailers.

Information and Cultural Industries (NAICS 51)

This sector comprises establishments primarily engaged in creating and disseminating (except by wholesale and retail methods) information and cultural products, such as written works, musical works or recorded performances, recorded dramatic performances, software and information databases, or providing the means to disseminate them. Establishments that provide access to equipment and expertise to process information are also included.

The main components of this sector are the publishing industries (except exclusively on Internet), including software publishing, the motion picture and sound recording industries, the broadcasting industries (except exclusively on Internet), the internet publishing and broadcasting industries, the telecommunications industries, the internet service providers, web search portals, data processing industries, and the other information services industries.

Finance and Insurance (NAICS 52)

This sector comprises establishments primarily engaged in financial transactions (that is, transactions involving the creation, liquidation, or change in ownership of financial assets) or in facilitating financial transactions. Included are:

- Establishments that are primarily engaged in financial intermediation. They raise funds by taking deposits and/or issuing securities, and, in the process, incur liabilities, which they use to acquire financial assets by making loans and/or purchasing securities. Putting themselves at risk, they channel funds from lenders to borrowers and transform or repackage the funds with respect to maturity, scale and risk.

- Establishments that are primarily engaged in the pooling of risk by underwriting annuities and insurance. They collect fees (insurance premiums or annuity considerations), build up reserves, invest those reserves and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.

- Establishments that are primarily engaged in providing specialized services that facilitate or support financial intermediation, insurance and employee benefit programs.

In addition, establishments charged with monetary control - the monetary authorities - are included in this sector.

Real Estate and Rental Leasing (NAICS 53)

This sector comprises establishments primarily engaged in renting, leasing or otherwise allowing the use of tangible or intangible assets.

Establishments primarily engaged in managing real estate for others; selling, renting and/or buying of real estate for others; and appraising real estate, are also included

Professional, Scientific and Technical Services (NAICS 54)

This sector comprises establishments primarily engaged in activities in which human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis.

The main components of this sector are:

- legal services industries;

- accounting and related services industries;

- architectural, engineering and related services industries;

- surveying and mapping services industries;

- design services industries;

- management, scientific and technical consulting services industries;

- scientific research and development services industries;
- advertising services industries.

The distinguishing feature of this sector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance. Thus, the establishments classified in this sector sell expertise.

Management of Companies and Enterprises (NAICS 55)

This sector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions.

They may undertake the function of management, or they may entrust the function of financial management to portfolio managers

Educational Services (NAICS 61)

This sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centres.

These establishments may be privately owned and operated, either for profit or not, or they may be publicly owned and operated. They may also offer food and accommodation services to their students.

Health Care and Social Assistance (NAICS 62)

This sector comprises establishments primarily engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

Arts, Entertainment and Recreation (NAICS 71)

This sector comprises establishments primarily engaged in operating facilities or providing services to meet the cultural, entertainment and recreational interests of their patrons. These establishments produce, promote or participate in live performances, events or exhibits intended for public viewing; provide the artistic, creative and technical skills necessary for the production of artistic products and live performances; preserve and exhibit objects and sites of historical, cultural or educational interest; and operate facilities or provide services that enable patrons to participate in sports or recreational activities of pursue amusement, hobbies and leisure-time interests.

Accommodation and Food Services (NAICS 72)

This sector comprises establishments primarily engaged in providing short-term lodging and complementary services to travellers, vacationers and others, in facilities such as hotels, motor hotels, resorts, motels, casino hotels, bed and breakfast accommodation, housekeeping cottages and cabins, recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of recreational and adventure camps.

This sector also comprises establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises

Public Administration (NAICS 91)

This sector comprises establishments primarily engaged in activities of a governmental nature, that is, the enactment and judicial interpretation of laws and their pursuant regulations, and the administration of programs based on them.

Legislative activities, taxation, national defence, public order and safety, immigration services, foreign affairs and international assistance, and the administration of government programs are activities that are purely governmental in nature.