WESTERN ONTARIO WOWC WARDENS CAUCUS | WORKFORCE STRATEGY

WESTERN ONTARIO WORKFORCE STRATEGY

Findings and Issues Report

PLANNING FOR PROSPERITY

Canada | EMPLOYMENT ONTARIO | Ontario

Western Ontario Wardens’ Caucus Workforce Strategy

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Contents

1 Executive Summary

The objectives of the Western Ontario Workforce Strategy are:

- To strengthen the access and quality of labour market intelligence to address the needs of businesses, create opportunities to strengthen the alignment between business needs and education programming.
- To inform municipal business retention and succession planning activities.
- To improve the region's access to skilled and talented labour pool.

The Findings and Issues Report marks the completion of Phase Two of the strategic planning process for the WOWC.

The report includes:

- Detailed economic and demographic analysis including population and workforce growth projections
- Forecasts of workforce supply and demand.
- Results of broad stakeholder engagement
- Research into current practices in the WOWC region and best practices from other regional organizations
- Specific considerations for the key sectors including manufacturing, health care, agriculture, post-secondary education, and small business
- A comprehensive analysis of housing trends, needs, planning and policy tools and options
- Regional marketing considerations

This briefing note provides a review of the highlights of the Findings and Issues Report. The briefing concludes with the introduction of four potential strategic priorities that would serve as the foundation for the WOWC Workforce Strategy.

Key Findings

Workforce Development

The Western Ontario Wardens region is expected to grow significantly in the coming years, based on estimates by EMSI, and by the provincial Ministry of Finance and its official population projections. Using EMSI employment forecasts for the region (excluding the separated cities), total employment is expected to increase by over 51,000 through 2030, a growth rate of 8%. The sectors with the fastest expected growth over this period are health care, construction, manufacturing, retail trade and administrative and support services.

The larger requirement for new workers will come from replacement demand, replacing those leaving the workforce through retirement. The potential loss across the region could be close to 163,000 workforce participants. If the share of workers expected to retire over the 2020-2030 timeframe continues at the current pace, it would remove 163,000 people from the workforce.

Combined the growth demand of new and expanding firms and replacement demand, will create 213,900 jobs over the 2020-2030 period that must be filled.

The COVID-19 pandemic has exacerbated workforce shortages in the WOWC that existed pre-COVID.

There are several challenges that were identified through the interviews, focus groups and other research. There is a growing gap between employer expectations and worker needs. One example is childcare. If employers were to better align work shifts to childcare requirements it would expand the potential size of the workforce. There is also a growing skills gap in the region; in the construction and manufacturing sectors, for example.

The post-secondary education system must be strongly aligned to workforce demand. Addressing existing gaps will require adult reskilling, micro-credential offerings and other customized training.

Finally, it is very important for employers to show potential employees/entry level workers the potential career pathways that emerge from starting with the firm. In the consultations, many employers indicated they had significant difficulty recruiting young people into entry level positions. A better understanding of career pathing (up to and including owning their own business one day) is an important part of the recruitment process for firms small and large.

Workforce Supply

Without a substantial influx of new workers, the local population in the WOWC region will not be able to supply workforce demand through 2030 or 2040. Assuming no young people left the region, the workforce supply 'gap' through 2030 is over 84,000. Population projections for the region by the Ontario Ministry of Finance vary widely from jurisdiction to jurisdiction. The working age population in Dufferin is expected to rise by 16% while it is forecasted to decline by 6% in Chatham-Kent. Even in the jurisdictions that are forecasted to grow strongly, there is no guarantee they will grow without a strategy to address and support population attraction, housing development, and other related factors.

As of 2020, the region relies heavily on intraprovincial migration (elsewhere in Ontario) for the vast majority of population growth. With a few exceptions, there is limited direct immigration into the region. The natural population growth rate (births less deaths) is quite low across the region and negative in many jurisdictions. Because of the large agriculture sector, the region is highly reliant on temporary foreign workers (TFWs) which represents 58% of the provincial total in a typical year.

Moving forward, the region will need to attract more immigrants and should pursue efforts in encouraging older workers to stay in the workforce longer. There is also potential to increase workforce participation among other groups that have lower engagement such as persons with physical and mental health disabilities.

Strategic Sector Workforce Demand

Not all industry sectors have the same workforce demand profile. The bulk of the demand between 2020 and 2030 will come from five broad sector groups including manufacturing (29,900 jobs), health care and social assistance (28,300), construction (21,300), retail trade (20,300) and administrative and support services (12,400).

Within these sectors, there will be specific occupations in the highest demand. While that level of detail is not developed here it will include a variety of professional, technical and non-technical roles. For example, future demand for home care workers, nurses, heavy equipment operators, retail salespersons and specialized manufacturing machine operators is projected to be high across the region.

Employer Recruitment

Employers and economic development stakeholders reported that a lack of housing options, for purchase or rent, has become a major barrier to attracting workers across the WOWC region.

A survey of employers across the region indicated that most employers are not recruiting outside the region despite the challenges they are experiencing in finding appropriately skilled workers locally. Few employers are working with entry level and junior employees to ensure they are aware of the career opportunities building on their existing experience.

Newcomers to the region and the country will become an even more important source of the workforce. Smaller employers will need assistance with equity, diversity and inclusion efforts to ensure welcoming workplaces and communities.

The agricultural sector already makes good use of the temporary foreign worker program to address their seasonal workforce needs. This program is expected to become even more important to address the region’s workforce needs. Smaller employers would benefit from assistance in accessing this program, recruiting workers and following the detailed and complicated regulations. Coordinated efforts for targeted recruitment drives, community drives and youth engagement would further bolster employer needs.

People Attraction

Talent attraction efforts vary widely across the WOWC region based on sector and employer needs and community factors such as real estate costs and availability, transportation and other supports.

Some sectors and occupations are facing serious supply deficits in the WOWC region. The WOWC should focus its resident attraction efforts on filling those workforce needs. Employers must be actively engaged in talent attraction efforts to ensure the recruitment and other supports are aligned with their specific needs.

Employers also need to be able to clearly articulate the value proposition for each community that would become the new home of prospective recruits.

Post-Secondary Talent Pipeline

The workforce in the WOWC region is much more dependent on college education than university. Universities do play an important role in workforce development however it will be even more important to ensure that the WOWC region has capacity in the college system to address workforce demand in the coming years. Currently, the region's colleges have fewer students enrolled, relative to workforce size, than the rest of the province.

Both the region's colleges and universities have seen an increase in international students in recent years. This is very important because these post-secondary education institutions are important conduits for immigration.

There are more older students attending the region's colleges and universities, but the system will need to broaden it's programming in this area if the region is to ensure that older workers have the skills they need to participate in the workforce.

Housing

The housing review section provides an overview of population growth and housing trends for the WOWC region. It includes strategic recommendations informed by growth and workforce trends as well as best practice application of planning and policy tools to support attainable housing. These recommendations support a growing working age population for the WOWC region.

The population across much of the WOWC region has been growing strongly in the past few years. However, the WOWC region is challenged with rising housing prices and a lack of housing tenure and typology options. Continued growth will depend on the region's ability to support a growing workforce. This requires housing options that are attainable and suitable for the workforce. Housing needs to be provided with connection to transportation opportunities as well as essential community services, and other elements of complete communities. The workforce is attracted to areas based on service needs, amenities, and access to employment.

Best practice examples of attainable housing projects provide insight into the range of housing typology and tenure options as well as planning and policy tools to support implementation. The housing review considers best practices in alignment with strengths, challenges, and opportunities unique to the WOWC region. The analysis of housing options considers five broad workforce personas informed by dominant and emerging workforce trends in the WOWC region. The housing review aligns growth trends, workforce personas, and attainable housing options to provide recommendations for the WOWC region municipalities to advance attainable housing.

Small Business

The vast majority of businesses in the WOWC region have under 25 employees. At this size they are less likely to have dedicated human resource staff for recruitment, retention and career planning with their staff. These firms often have less capacity to adopt upskilling existing workers or adapting to new recruitment techniques. including online recruitment and training programs.

The report outlines the need to recruit from more diverse groups which could require additional human resource supports to integrate them into the workplace.

Sole proprietors and small business operators could easily be overlooked when considering workforce development needs but these workers are a critical part of the WOWC workforce, representing up to 25% of the total workforce. The role of these individuals is equally important for the services they provide in the community. Succession planning will be essential to ensure the services continue to be available in the community.

Rural Limitations

Rural communities face distinct challenges compared to their urban counterparts. The population size has typically limited the range of housing styles. Transportation systems to assist rural residents to travel to other communities for work are also limited or non-existent. Broadband service is not sufficient in many areas to support rurally based businesses and remote workers. Rural communities also do not provide the variety of amenities that prospective residents and workers may be accustomed to in more urban communities. Childcare in particular is a limiting factor for supporting workers with children.

Immigration is recognized as a key to addressing workforce needs but currently immigrants and the related immigrant support programs that will support retention initiatives are concentrated in urban areas.

Regional Marketing

Each member municipality within the WOWC region has assets, features, and benefits, that set them apart from their neighbours. These are important differentiators that can assist in individual marketing efforts.

From a high-level view, an understanding of the individual target audiences (personas) identified within the report, provides an insight to what motivates these target audiences to remain in the WOWC region or consider moving to the region.

The value propositions by persona will assist the member municipalities to understand each persona's motivators. They provide guidance for marketing campaigns and creative content, such as messaging and imagery, to be developed that allow the individual persona to feel authentically understood.

Marketing Tools

The Findings and Issues Report provides a review of various tools that other regional organizations have used successfully on behalf of their membership. These tools include customizable toolkits, regional data delivery through website and other digital tools, community profiles, promotional campaigns and self-administered assessment checklists.

We now live in a data driven marketing world. The positive side of this is that marketing can be incredibly targeted, literally down to an individual. In WOWC's case, the region as a whole or each member municipality can share their findings and insights leveraging strength in numbers to reach successful outcomes.

Each member municipality is at a different place in their development in market readiness, budgetary restraints, asset inventories, etc. Even a municipality with very little budget can encourage community buy-in, appoint community ambassadors and champions to help develop goals and objectives, based upon an insightful self- assessment checklist. Likewise, based upon examples provided within the report, each municipality determine what will work for them, and customize their tools kit to fit their goals, objectives, and budgets.

A community profile is a basic view into a municipality providing migrants, newcomers, entrepreneurs', or prospective businesses, a snapshot of all the reasons (emotional and quantifiable) why they should consider this particular municipality and the WOWC Region as a whole. With a strong and memorable "call to action" that is easy for a prospect to proceed to the next step of their decision-making process.

Strategic Priorities for Consideration

Strategic priorities are those items that must be considered for successfully addressing workforce development in the WOWC region. The strategic priorities recommended for consideration and discussion with the WOWC Economic Development Committee are workforce retention and attraction, leveraging the existing population, attainable housing and employer recruitment and retention.

Workforce Retention and Attraction

- The regional workforce is highly reliant on **college educated workers**, but the college system in the region has relatively fewer college students compared to the rest of the province. There needs to be more external marketing/promotion of career and job opportunities in the region. Most firms/organizations have historically relied on local recruitment, particularly word-of-mouth. There will need to be more **promotion of job opportunities** outside the region – in Ontario, across Canada and beyond. Some of this can be done collectively to reduce the cost and administrative effort for individual smaller firms.

- There needs to be more **childcare support across** the region to foster greater workforce participation.
- **Immigrant settlement and retention support** needs to be ramped up across the region. Urban centres/smaller communities should share resources.
- The WOWC Region has many assets; geographic and nature based, existing communities and amenities, varied employment options, and entrepreneurial opportunities to allow for a world class **attraction and retention marketing campaign** to be developed and marketed locally, regionally, and nationally.
- The development of the Workforce Strategy at this time provides an opportunity to look at all that the WOWC Region has to offer with fresh eyes and to **appreciate the assets.** Each WOWC member municipality will need to showcase their individual community and the WOWC region to the target audiences to be successful.
- WOWC will need to develop a core brand campaign to **facilitate the individual member's efforts** in establishing and clearly defining their unique assets so they can customize, maintain and continue to expand their marketing efforts. WOWC should incorporate key messages and design elements into customizable materials to ensure continuity and usage.

Leveraging Existing Population

- Young people in the region need greater **exposure to local careers and career paths.** Even if they leave for education or a first job, they should be targets.
- There should be **better coordination between the post-secondary education (PSE) sector and workforce demand.** This is particularly true for strategically important sectors including agriculture, manufacturing and health care but applies to all industries.
- There may be opportunities to increase the participation of under-represented groups in the workforce such as individuals with physical disabilities.

Attainable Housing

- Alignment is needed between the local workforce need and **identifying the most relevant housing format**. This can be done as part of County level strategies and supporting the development industry to expand building models.
- **Model policy development for** local municipalities is an important tool that the WOWC and County governments can promote. This can encourage community acceptance of housing alternatives and provide local communities direction for policy development and implementation.
- **Engagement with the housing industry** is important to support growth, access to resources and other tools needed to scale up and meet demand across the region.
- Housing strategy at a County level needs to include partners, incentives and community engagement as key components. **Consultation and collaboration** on opportunity and education will support uptake and is necessary to expedite an increase in housing supply.

- **Managing data** to track housing need and uptake is essential as an action to support a housing strategy. Progress must be monitored to ensure performance is being met and to identify where resources are needed and where emphasis needs to shift over time.
- **PSE student housing** must be part of any overall housing strategy.

Employer Recruitment and Retention

- Companies/organizations need to be open to **fostering a more flexible and welcoming workforce.** This includes remote/hybrid working where possible, modifying shiftwork to accommodate young families, adjusting shifts/work week to accommodate older workers, embracing equity, diversity and inclusion principles and offering a broader range of non-salary benefits.
- Many companies/organizations need to do a better job of laying out the **career path for new hires.** Many of the jobs going unfilled are entry level and more work should be done to show new hires what the options are if they perform well in the jobs. In many sectors this could include owning their own business one day.
- Employers must be engaged as active members of the implementation of the workforce strategy. The WOWC can **support employers' recruitment efforts** through community marketing tools, digital recruitment (already in use in many member municipalities), TFW supports and recruitment missions.

INTRODUCTION

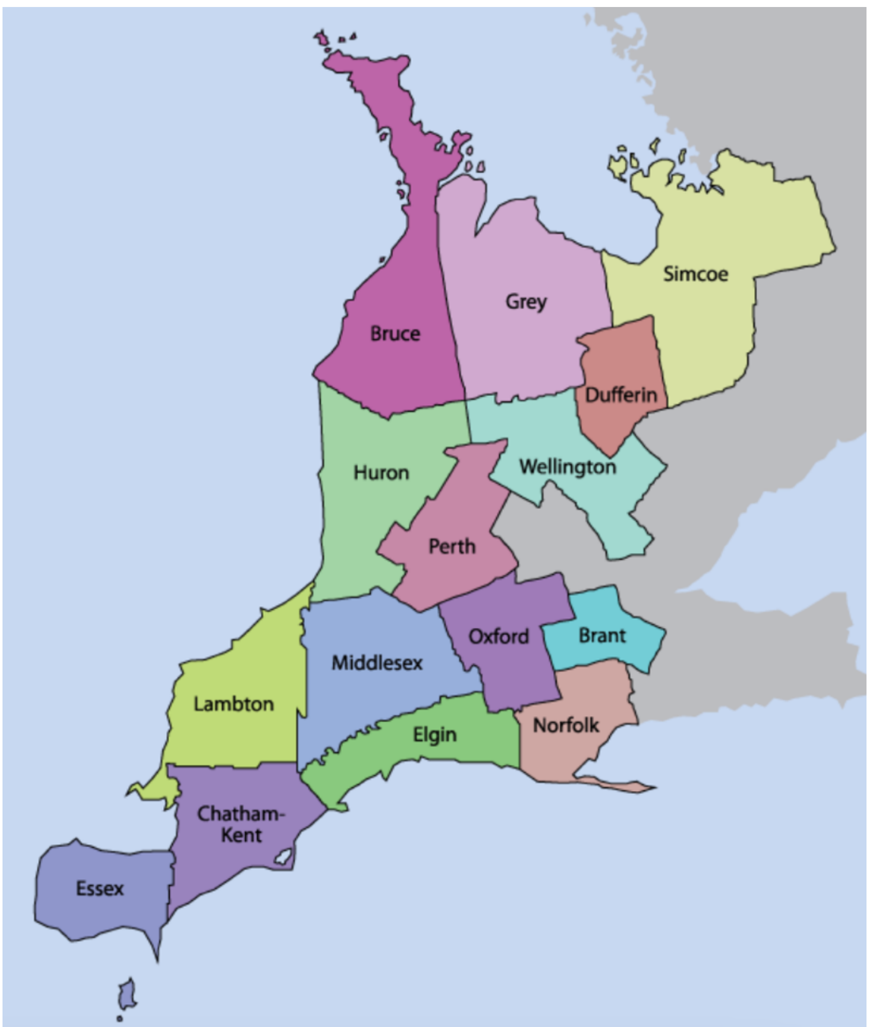
Developing the WOWC Workforce Strategy

2 Introduction

The Western Ontario Wardens' Caucus (WOWC) received funding from the Ontario Labour Market Partnership Project to support the development of the Western Ontario Workforce Strategy (WOWS).

The Western Ontario Wardens' Caucus (WOWC) is a not-for-profit organization representing 15 upper tier and single tier municipalities in southwestern Ontario, including: Brant, Bruce, Chatham-Kent, Dufferin, Elgin, Essex, Grey, Huron, Lambton, Middlesex, Norfolk, Oxford, Perth, Simcoe, and Wellington counties.

Figure 1: WOWC region

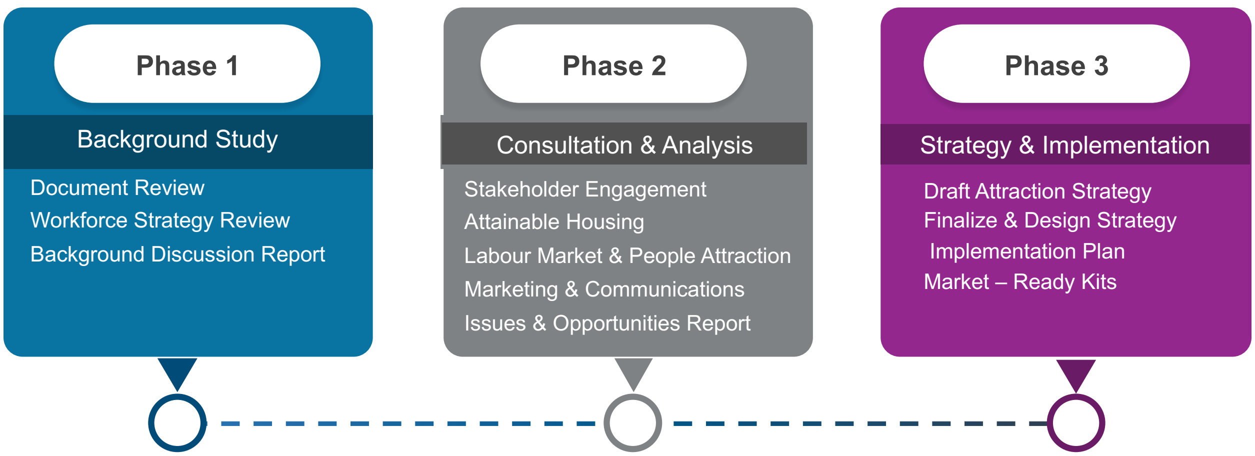


The objectives of the Western Ontario Workforce Strategy are:

- To strengthen the access and quality of labour market intelligence to address the needs of businesses, create opportunities to strengthen the alignment between business needs and education programming.
- To inform municipal business retention and succession planning activities.
- To improve the region's access to skilled and talented labour pool.

The process of developing the Western Ontario Workforce Strategy consists of three phases: Background Study, Consultation and Analysis and Strategy and Implementation.

Figure 2: Western Ontario Workforce Strategy: Strategic Planning Process



This report includes the following components:

Stakeholder engagement: a summary of stakeholder engagement techniques and the insights gained through broad community consultation.

Attainable housing: a comprehensive analysis of the housing supply and demand by jurisdiction in the WOWC and case studies of programs to address housing needs.

Labour market and people attraction: a detailed analysis of the demographic and economic trends and forecasts that will drive workforce demand and a review of current resident and talent attraction efforts across the region.

Marketing and communications: a review of marketing tactics used by other regional organizations that could be utilized by the WOWC to support the workforce strategy.

The report includes a summary of the key findings of these four strategic considerations, a SWOT (strengths, weaknesses, opportunities, and threats) analysis and strategic priorities for consideration in the development of the workforce strategy.

Notes on the Data Analysis

The WOWC does not include the cities of London, Windsor, Guelph, Brantford, Barrie, Orillia, St. Thomas, Stratford, the Town of St. Marys and the Township of Pelee. For the purposes of this report, the geographic and jurisdictional area represented by the WOWC is referred to as the “study area”. Throughout this report, where possible the data and analysis will be related to these counties/municipalities. In certain cases, where the individual cities cannot be excluded, they will be included in the data. When this is the case, it will be noted.

The data in this report comes from a variety of sources available as of June 2021 including Statistics Canada 2016 Census, Statistics Canada Business Counts, Ontario Ministry of Finance, EMSI Analysis 2020 (based on the 2016 census). Ideally this data will be revisited after the 2021 Census data is published in 2022.

Several jurisdictions in the WOWC region have more than one formal population projection estimate through 2040 and beyond (e.g., Simcoe and Wellington Counties). For the purposes of this report, the Ontario Ministry of Finance projections developed in Spring 2021 were used. Rather than use a variety of different sources, one credible and standard source such as the Ministry of Finance was preferable.

Further, some other projections might only be at the county-level whereas in this report we have removed the separated cities from the population projections (e.g., the Simcoe County projection excludes Barrie and Orillia). It is important to reiterate these are just projections based on the best information at the time of development. In the case of jurisdictions where the population and workforce projections through 2030 and 2040 are quite low, the focus should be on increasing population growth to ensure the jurisdictions can meet workforce demand. In the jurisdictions where the projections are more than enough to meet expected workforce demand, work will still be needed to ensure those projections are realized. Housing bottlenecks, rising costs and other factors could derail population growth.

It is also important to note that COVID-19 has changed previous patterns of population migration, business investment and new business startup activity. The workforce demand estimates should be considered broadly as directional and not highly specific targets.

STAKEHOLDER ENGAGEMENT

Insights from across the WOWC region

3 Stakeholder Engagement

Stakeholder engagement is a critical building block in the strategic planning process. The stakeholder engagement plan was designed to collect insights from WOWC member municipalities including elected officials and staff, stakeholder and community groups, businesses, along with representatives from organizations engaged in economic development, workforce development, housing and post-secondary education and other stakeholders

The stakeholder engagement tactics included regular updates to the WOWC website project page, a series of community workshops, interviews and meetings with sector subject matter experts and a survey of businesses across the region. Close to 500 individuals participated in the WOWC's stakeholder engagement initiatives.

3.1 Community Workshops

WOWC hosted 15 virtual, community-based workshops with representatives from across the region between June 21 and August 12, 2021. In total 249 people participated including elected officials, municipal economic development and planning staff, as well as representatives from business, industry associations, workforce planning boards, Chambers of Commerce, post-secondary institutions, immigration and social service organizations and other community stakeholders. The Community Workshop schedule is included in the Appendix.

Each workshop started with a presentation outlining the purpose of the WOWC Workforce Strategy and the process through which it will be developed. The presentation also included a review of the participants' community economic and demographic analysis and an introduction to the relationship between housing and workforce development. The workshops then turned to a facilitated discussion where participants were asked to provide their views on the current state of workforce development along with significant trends and the main priorities moving forward. The key themes below reflect feedback by multiple participants at the workshops. Workshop participants received a summary of their individual workshop and were encouraged to provide further information or clarification on the results.

Key Themes

Barriers to Workforce Recruitment and Retention

- Mismatch between employer requirements and resident skills (technical and soft skills)
- Employer expectations not aligned with workers' needs
  - Lower wages and high housing costs
  - Seasonal & temporary work
  - Full vs. part time
  - Working conditions
- Transportation – connecting rural communities, where people live and where they work
- Adequate childcare and other services partly driven by exurban demand
- Becoming more welcoming and diverse to support immigrant population
- Competition between employers and communities
- Rural internet service
- COVID-19, the impact of CERB payments, and the greater negative impact on women in the workforce due to childcare needs and the prevalence in customer service roles

- Lack of knowledge
    - Workers: career paths, rural living benefits, perceived lack of amenities
    - Employers: changing power dynamics – workers have more choices and employers face more competition for workers
    - Community: benefits of immigrants, acceptance of other forms of housing
    - Limited training options in rural communities (especially skilled trades)

Opportunities

- Promoting the quality of life and affordability of rural life relative to other areas
- Closer ties with post-secondary education: local training options, micro-credentialling, co-ops and work placements, getting international students to stay, skilled trades
- Immigration: supports in rural communities, recruiting for specific skills
- Transportation for workers
- Greater private sector commitment: upskilling, spending more to attract workers, supporting community efforts, finding housing, job sharing, flexible hours, employing persons with barriers to employment
- Promoting local employment opportunities – job portals, job matching services
- Immigrants and newcomers are effective in recruiting friends and relatives in their network
- Broadband– remote workers could support local businesses. Recruiting new residents who are working remotely to work locally
- Educating high school students, parents, teachers on career paths
- Affordable, accessible childcare
- Capitalizing on workforce need or local supports – e.g. health care, innovation, digital connection to work from home
- Succession planning
- Supporting spousal employment

Workforce Development and Housing

- Housing demand exceeds supply for rentals and purchases driving up prices
- Finding adequate housing is the biggest obstacle to recruiting workers
- High price of housing excludes new entrants to the workforce, immigrants and some other lower wage workers
- Housing market (and consumer demand) focused on single family homes
- Greater diversity in housing types and ownership models required
- NIMBYism is a challenge for increasing housing density
- Lengthy approval processes and a shortage of construction workers is slowing the response to housing demand
- Vacation rentals (AirBnB, VRBO) are displacing longer term rental housing
- Rental rates are often more expensive than mortgage payments
- Investment companies are entering some markets and escalating housing prices
- Lack of seasonal, educational or other short-term housing
- Lack of transition housing options to encourage workers to stay and be able to move up
- Supply in general needs to be addressed based on need to alleviate pressure

Attainable housing

- Housing types and prices that align with residents' income and stage of life
- Living wages that reflect local housing costs. Threshold of 30% of income for housing not possible in many communities

- Workers need to be able to get from where they live to where they work
- Inexpensive housing without transportation to the workplace is not attainable
- Many municipalities have established or are in the process of developing attainable housing strategies

Workforce Development Priorities

- Targeted workforce attraction, newcomer attraction based on required skills
- Awareness: promoting job opportunities, community features and amenities (tourism destination marketing organizations are engaged in similar industry specific activities)
- Expanding existing workforce: upskilling and other supports for individuals with barriers to employment
- Diversity, equity and inclusion: embracing newcomers and under-represented[1] individuals
- Transportation plans connecting workers with the workplace
- Increased housing supply and range of housing types (rental apartments, multi-unit residential buildings, secondary suites, tiny homes, converting vacant buildings)
- Inclusionary zoning and density ratios for residential developments
- Ensuring broadband is part of basic infrastructure
- Ensuring all infrastructure and the planning process for growth include expediting housing starts
- Collaboration: engaging employers, workers, educators, developers/builders, transportation, community partners, all levels of government
- Youth focus: exposing students to career paths and local firms, strong focus for employers to take apprentices and understand worker needs
- More nimble employers: industry specific supports, flexible hours, childcare, options for full or part time work
- Succession planning: connecting new entrepreneurs and immigrant entrepreneurs with business owners planning to retire, providing financing to support the transition
- Increasing support for new entrepreneurs (mentorship, coaching and financing)
- A focus on smaller builders and contractors to help them become more efficient and productive, find the workers they need and explore opportunities to expand beyond single family home development

3.2 Business Survey

An online survey of businesses in the WOWC region was conducted between July 27 and August 23, 2021, to gain insights on businesses' experiences and insights on their workforce needs. The survey was available through the WOWC website. It was shared with all WOWC economic development committee members and community workshop participants to distribute to their networks and promoted through WOWC social media posts.

A total of 194 responses were submitted and analyzed. The following pages provide a summary of the key findings from the survey. This survey was self-administered and not random and therefore the survey results are not statistically significant. Nonetheless, the survey responses provide an indication of the experiences and insights of the businesses in the WOWC region. As with other consultation tools, the survey findings should not be considered in isolation but rather should provide additional context along with the other consultation and analysis outlined in this report.

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[1] The underrepresented populations include black, indigenous, and other people of colour, LGBTQs+, as well as those who do not participate in employment as a result of various physical and mental health barriers.

The 194 survey respondents were located throughout the WOWC region and provided broad representation of all key industry sectors.

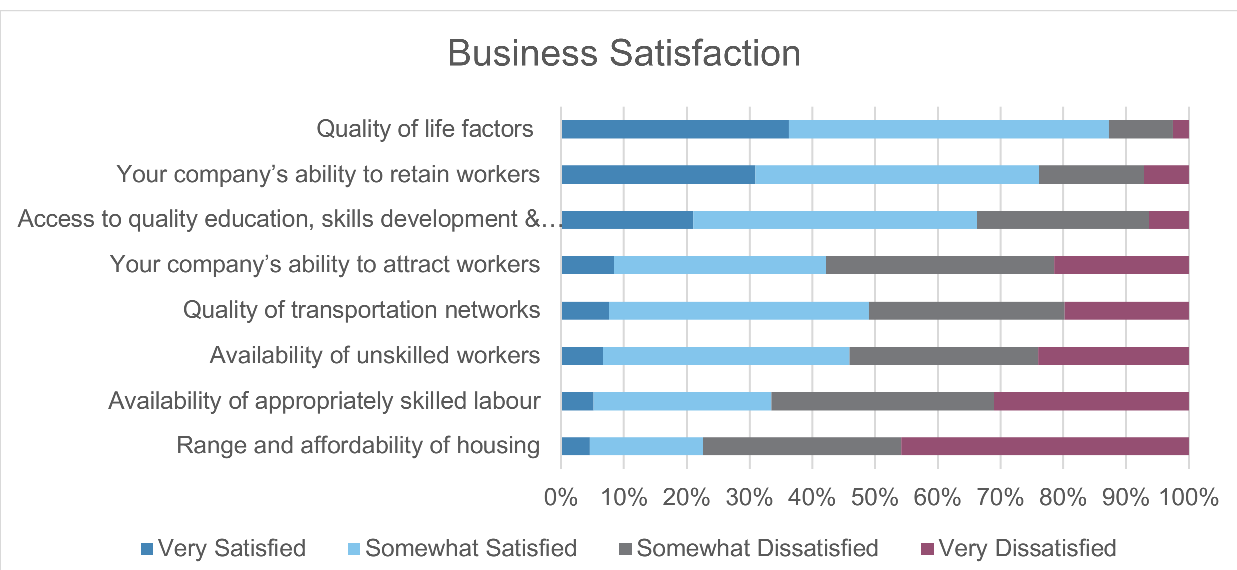
The top industries represented through the survey in order, were:

- Manufacturing
- Other services
- Agriculture
- Public administration
- Retail trade
- Accommodation and food services
- Health care and social services
- Professional, scientific, and technical services
- Construction
- Educational services.

The respondents were asked to rate their satisfaction on several factors related to workforce attraction and retention (Figure 3). The respondents were most satisfied with their community's quality of life factors (36% very satisfied, 51% somewhat satisfied), their company's ability to attract and retain workers (31% very satisfied, 45% somewhat satisfied) and access to quality education and skills development (21% very satisfied, 45% somewhat satisfied).

They were least satisfied with the range and affordability of housing (46% very dissatisfied, 32% somewhat dissatisfied) followed by the availability of appropriately skilled labour (31% very dissatisfied, 35% somewhat dissatisfied) and availability of unskilled workers (24% very dissatisfied, 30% somewhat dissatisfied. The quality of transportation networks was also an area of dissatisfaction for half of the businesses surveyed. There was a similar level of dissatisfaction with the respondent company's ability to attract workers.

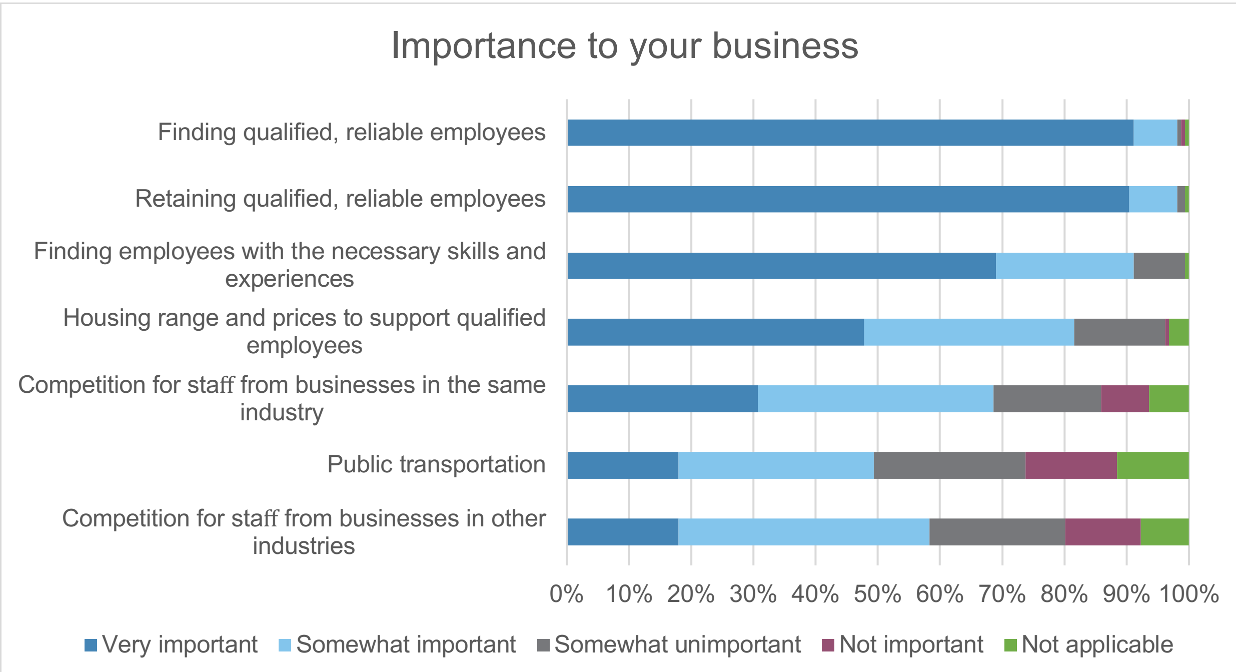
Figure 3: Respondent's satisfaction with factors related to workforce attraction and retention



N=157

The respondents ranked the importance of several factors related to their workforce development (Figure 4). The vast majority (over 90%) of respondents said that finding qualified, reliable employees and retaining qualified, reliable employees was very important to their business.

Figure 4: Importance of workforce factors to the business



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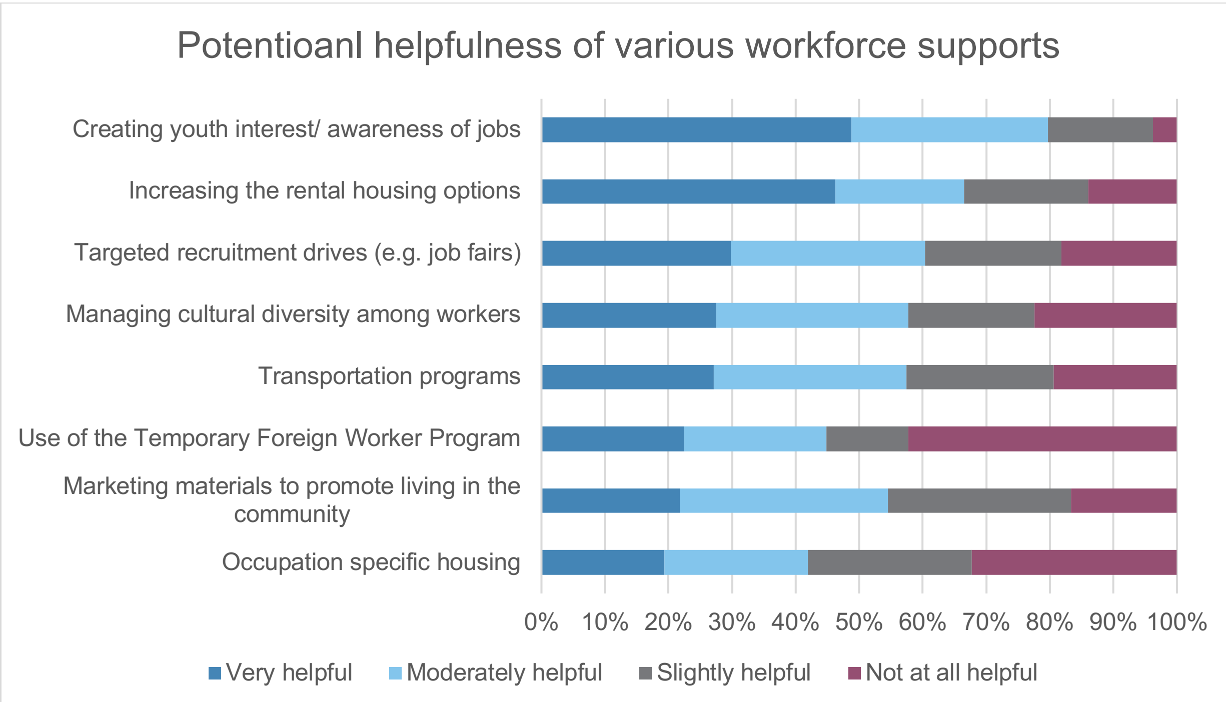
The respondents were asked to provide their opinion on the helpfulness of a range of potential supports for their company's workforce recruitment and retention. As shown in Figure 5, the most popular of the supports listed was creating youth interest and awareness of jobs (ranked as very helpful by 49% and moderately helpful by an additional 31%). Increasing rental housing options was ranked very high by 46% and moderately helpful by 20%. Other popular supports or tools included targeted recruitment drives such as job fairs, managing cultural diversity among workers and transportation programs, with each ranked as very helpful or moderately helpful by over 50% of respondents. The remaining supports were use of the temporary foreign worker program, marketing materials to promote hiring in the community and occupation specific housing.

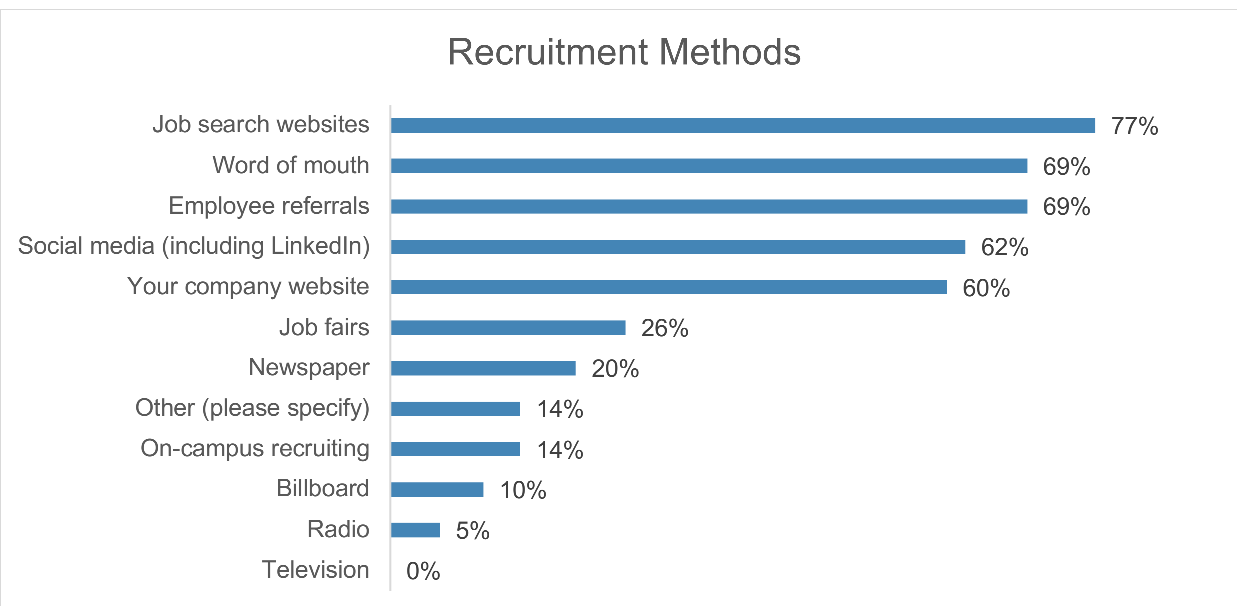
The respondents have used a range of workforce recruitment efforts. When asked to identify all the workforce recruitment tools they used, the most common tools identified were job search websites (77%), word of mouth (69%), employee referrals (69%), social media (62%) and the company website (60%). Less common options included job fairs (26%), newspaper (20%), on-campus recruiting (14%) billboards (10%) and radio (5%). Other recruitment tools included recruitment firms, industry associations, and personnel agencies.

Figure 5: Ranking of helpfulness of tools or supports for business recruitment and retention



N=158

Figure 6: Job recruitment methods used



N=149

The respondents were then asked to select all the geographic boundaries of their recruitment efforts, just 11% of respondents reported that they recruit workers internationally and 9% indicated they search nationally (Figure 7). One third recruit province wide and 43% recruit across their respective County. Almost all employers (85%) also recruit locally.

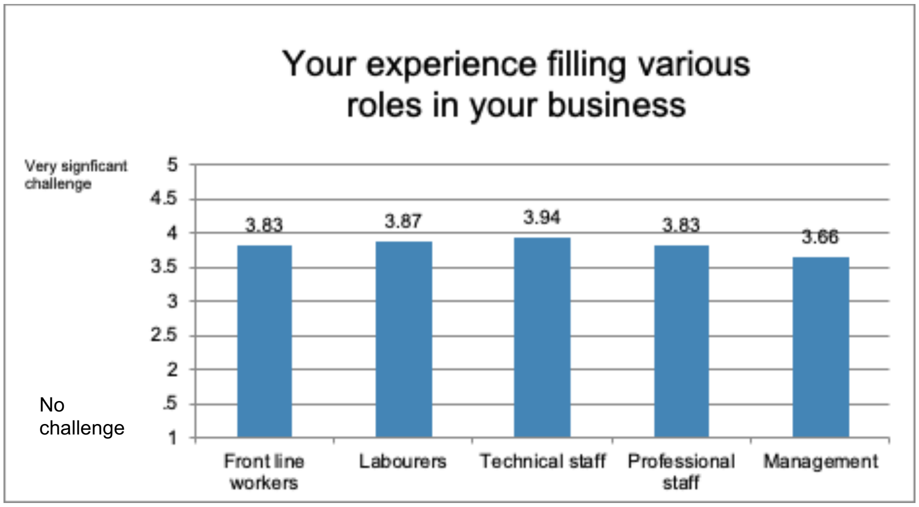
Figure 7: Where do you recruit workers?

N=149

Of the handful of businesses recruiting international employees, the most common source of recruits were international students with a work permit, followed by express entry candidates and temporary foreign workers.

The respondents were asked to evaluate the challenges related to filling specific types of roles from a low of one for no challenge to five for a very significant challenge. All the roles were rated as moderately to significantly challenging, with very little difference between them. Filling technical roles was ranked as the most challenging with a weighted average of 3.94 followed by labourers at 3.87. Professional staff and front-line workers were rated as equally challenging with a weighted average of 3.83 and management roles received a weighted average of 3.66 (Figure 8).

Figure 8: Challenge in filling various roles

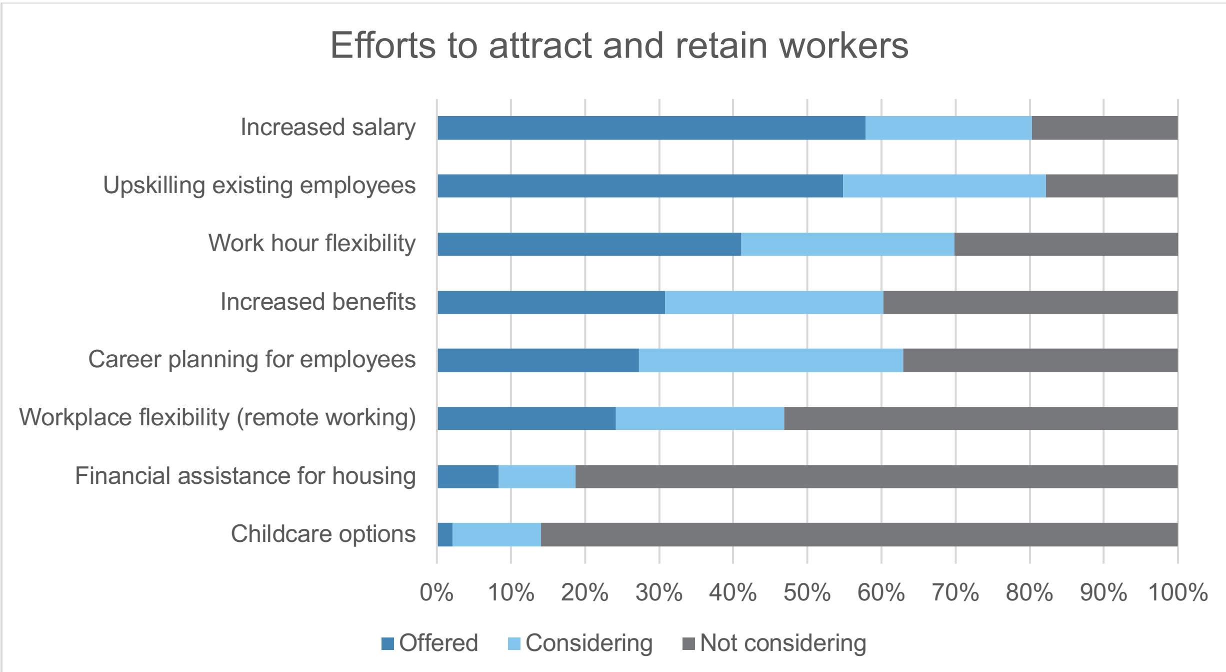


N=149

Respondents were also asked to report on which incentives or supports they have offered or considered offering to attract or retain workers (Figure 9). The majority (58%) had increased salaries and upskilled existing employees (55%). A full 41% had offered work hour flexibility and 31% had increased benefits.

The respondents were divided on providing career planning for their workers with 27% providing this service, 36% considering it and another 37% were not considering it. The group was similarly divided on workplace flexibility or remote working with 24% offering remote working while 51% were not considering it (this is not surprising given the large numbers of manufacturers and agricultural businesses participating in the survey). The vast majority of respondents were not considering providing financial assistance for housing (81%) or childcare options. (86%)

Figure 9: Efforts to attract and retain workers



N=147

STRATEGIC WORKFORCE DEVELOPMENT NEEDS

Addressing key industry sectors

4 Strategic Workforce Development Needs

Some industry sectors are particularly critical to the WOWC regional economy. This section provides an overview of the challenges and opportunities facing the manufacturing and agriculture sectors and the specific workforce considerations for entrepreneurship and small business in the WOWC region.

The observations and findings are based on interviews with industry leaders, a review of industry strategies and research reports and feedback from the 15 Community Focus Groups, (which included industry representation).

4.1 Manufacturing

The manufacturing sector is a key economic driver in the WOWC region. It is the top industry by employment in the region, responsible for 97,130 jobs in 2020[2]; representing 15.1% of the total employment (Table 1). The number of jobs in the manufacturing sector is expected to grow by 6% in the region, creating another 6,005 jobs to reach 103,134 by 2030[3].

During this same period 23,900 workers could potentially exit the workforce through retirement. As a result, the total workforce demand is expected to be 29,900 by 2030 including the replacement demand of 23,900 and the growth demand of 6,000[4].

Table 1: Projected Manufacturing Employment Demand 2030

2020 Jobs	2030 Jobs	Replacement demand	Growth demand	Total demand
97,130	103,134	+23,917	+6,005	+29,922

Source: EMSI Analyst and Mellor Murray calculations.

At the individual WOWC member level, manufacturing ranks as the number one employer in six municipalities and as the top three employer in 11 of the 15 municipalities. (Table 2)

[2] EMSI Analysis, 2021.
[3] Note on timelines: In this report, various future dates are used including 2030, 2036, 2040 and 2046. The differences relate to the primary source used in the analysis covered in the various sections of the report.
[4] EMSI and Mellor Murray calculations.

Table 2: Manufacturing employment rank of 20 2-digit NAICS industries (excluding separated cities)

County/Municipality	Manufacturing Employment Rank
Brant	1
Bruce	8
Chatham-Kent	3
Dufferin	4
Elgin	2
Essex	1
Grey	3
Huron	4
Lambton	2
Middlesex	1
Norfolk	4
Oxford	1
Perth	2
Simcoe	1
Wellington	1
WOWC Region	**1**

Rank among all 2-Digit NAICS industries. More detail on employment by sector by County is included in the appendix
Source: EMSI Analyst and Mellor Murray calculations.

Manufacturing's contribution to the Canadian economy is significant. In addition to employing more than almost all other sectors of the Canadian economy, manufacturing also pays higher than average wages and employs individuals at every skill level[5].

The Canadian Manufacturing and Exporters (CME) 2019 Manufacturing Workforce Survey determined that Canadian manufactures are struggling to find and retain the right talent to help their operations grow[6]. More than 85% of manufacturers struggle with skills and labour shortages. The workforce challenges hamper their ability to invest, adopt the latest technologies and compete globally. According to the CME, Canadian youth are increasingly unprepared and uninterested in working in the sector, employers lack the capacity to invest in skills and training and current immigration levels are not meeting existing workforce needs.

CME recommended three key areas of action:

- Attracting and retaining youth through promotion and a realignment of the education system
- Upskilling Canadians with incentives for employers' investments in training

[6] Canadian Manufacturers & Exporters, Manufacturing Workforce Survey Report, 2019, https://cme-mec.ca/wp-content/uploads/2019/10/2019-CME-Manufacturing-Workforce-Survey-Report-FINAL.pdf

- Leveraging immigration with reforms to the Canadian immigration system to better align the profile and skills of immigrants attracted to the country to the jobs and economic opportunities on offer.

Within the WOWC region, industry representatives reported that the curriculum and equipment in the region's community colleges is lagging far behind industry practice. They also reported that there is a lack of understanding of the need to create a more welcoming workplace for a diverse workforce and a new generation of workers that expect a more flexible work environment.

According to the community workshop participants, manufacturing is perceived by some youth as monotonous and dirty. They struggle to connect the lower paying entry level roles with a long-term career path. Many may also be influenced by parents and others who witnessed the decline of the manufacturing sector in Ontario 20 years ago. Contrary to the negative perceptions, manufacturing jobs increasingly require more skills and incorporate greater use of robotics and technology.

The Canadian Association of Mold Makers is currently developing programming to connect youth with industry contacts to discuss working environment, training and development support and the required skills through an anonymous online forum. They also support programs to encourage youth to explore the opportunities for a career in manufacturing including:

- FIRST Robotics Canada – robotics competitions
- Build a Dream – increasing women's participation in skilled trades
- Skills Ontario Promoting skilled trades and technology with competitions, virtual workshops and discovery days

4.2 Agriculture

There were 42,634 jobs in the agriculture, forestry and fishing sector (NAICS 11), representing 6.6% of all employment in the WOWC region in 2020. The sector ranks fifth in employment in the region behind manufacturing, health care and social assistance, retail trade and construction.

According to EMSI estimates, employment in the agriculture, forestry and fishing sector is expected to contract modestly between 2020 and 2030 by 6% to 40,027 jobs. During this time however 13,170 people are expected to exit the industry, based on their age, resulting in a demand for 10,560 new agriculture workers by 2030.

At the individual WOWC member level, agriculture ranks as the number one employer in three municipalities and in the top three employer in 4 of the 15 municipalities (Table 3).

Table 3: Projected Agriculture/Forestry Employment Demand 2030

2020 Jobs	2030 Jobs	Replacement demand	Growth demand	Total demand
42,634	40,027	+13,170	-2,607	+10,563

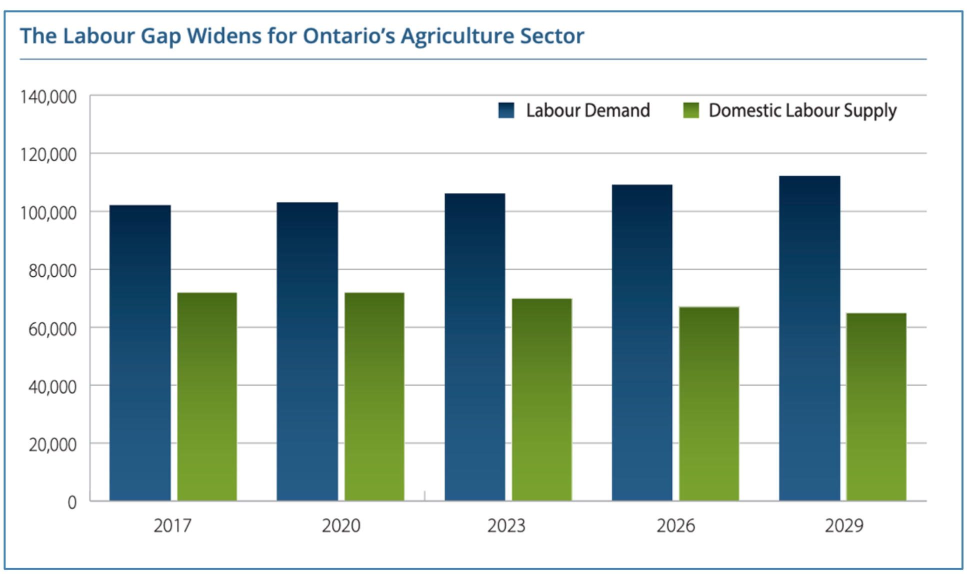
Source: EMSI Analyst and Mellor Murray calculations.

Table 4: Agriculture employment rank of 20 2-digit NAICS industries (less separated cities)

County/Municipality	Agriculture & Forestry Employment Rank (among all 2-Digit NAICS industries)
Brant	7
Bruce	5
Chatham-Kent	4
Dufferin	10
Elgin	1
Essex	5
Grey	6
Huron	1
Lambton	12
Middlesex	4
Norfolk	3
Oxford	6
Perth	1
Simcoe	14
Wellington	5
WOWC Region	5

Rank among all 2-Digit NAICS industries. More detail on employment by sector by County is included in the appendix
Source: EMSI Analyst and Mellor Murray calculations.

Figure 10: Agriculture Sector Labour Gap



Source: Canadian Agricultural Human Resource Council AgriLMI,
https://cahrc-ccrha.ca/programs/agrilmi/provincial-data/ontario

According to the Canadian Agricultural Human Resources Council (CAHRC), the Province of Ontario has the heaviest reliance on foreign agricultural workers across Canada. In 2017 Ontario's agricultural sector employed 29,300 foreign workers or 30% of the province's' total agricultural workforce. The high share of foreign workers is concentrated in the greenhouse, nursery and floriculture, tree fruit and vine and field fruit and vegetable sectors.

The aging domestic agricultural workforce will further reduce the supply of available workers in the future. CAHRC predicts that more than one in three of the current domestic agricultural workers will retire by 2029[7].

Even with the support of the foreign labour force, Ontario experienced a shortfall of 4,400 jobs that went unfilled in 2018. By 2029, CAHRC is reporting the potential of up to 47,300 jobs remaining unfilled due to a lack of domestic or foreign workers.

Some of the challenges in recruiting workers include work conditions, perceptions of low wages, seasonal work and limited advancement opportunities. Employers reported challenges with insufficient skills and experience among potential workers. It is expected that general farm worker positions will be the most difficult to fill as well as nursery and greenhouse workers, harvesting labourers and agricultural managers.

The CAHRC recommends the following measures to address the agricultural workforce challenge:

- Pathways to permanent residency for international agricultural and agri-food workers
- Removing caps on the duration of stays for seasonal international agricultural workers
- Providing staff to facilitate the approvals process for international workers
- Enhanced labour market information including wage rates and methodology to address government regulation requirements for temporary foreign workers
- Domestic labour supports including job resource centre and career promotion
- Investment in agricultural training and HR management

There is shortage of domestic agricultural workers and a prevalence of international workers throughout the WOWC region. The agricultural sector competes with other sectors such as manufacturing which typically pays higher wages than the agricultural sector. The agriculture sector struggles with the balance between lower margin operations, higher wage expectations of domestic workers and the cost and complicated process for recruiting and housing temporary foreign workers.

Housing regulations and approaches for international workers vary across the region including the use of on-farm congregate housing and producers buying homes for workers in residential neighbourhoods.

Both the neighbourhood integration and the on-farm housing options have faced some challenges. In some neighbourhoods, residents have complained that using homes for existing or temporary workers has the potential to drive down neighbourhood property values. In other communities, residents have complained that the purchase of homes in residential neighbourhoods for temporary workers is reducing the already limited supply of housing needed to attract permanent residents and

[7] How Labour Challenges Will Shape the Future of Agriculture in Ontario: Agriculture Forecast to 2029, Canadian Agricultural Human Resource Council, 2018, p.9, https://cahrc-ccrha.ca/programs/agrilmi/provincial-data/ontario

employees in other sectors. Some municipal councils are more supportive of on-farm housing applications than others. Housing supply for the temporary foreign workers has been further restricted due to COVID-19 physical distancing requirements. A federal review of housing for temporary foreign workers is expected to expand standards and exert additional pressures on agricultural employers.

The agriculture sector continues to embrace automation to increase production with the same or fewer staff. As the sector evolves, there will be a demand for new highly skilled agricultural workers. Ontario’s greenhouse industry currently relies on workers and technology from Holland. There may be opportunities to upskill existing staff to address the growing demand for horticulturalists, etymologists, environmental control operators, software programmers and greenhouse structure builders to name a few. Like the manufacturing sector, the agricultural sector faces challenges in attracting and retaining skilled workers and apprentices. Representatives from the agri-food sector reported that electricians, mechanics, and engineers are currently in high demand and are vulnerable to poaching.

4.3 Health care

Health care is a top two employment sector in seven of the 15 jurisdictions in the WOWC region and the top employment sector in Chatham-Kent, Grey, Lambton and Norfolk.

Table 5: Health care sector employment rank of 20 2-digit NAICS industries (excl. separated cities)

County/Municipality	Health Care Employment Rank (among all 2-Digit NAICS industries)
Brant	4
Bruce	4
Chatham-Kent	1
Dufferin	2
Elgin	4
Essex	4
Grey	1
Huron	2
Lambton	1
Middlesex	3
Norfolk	1
Oxford	2
Perth	6
Simcoe	4
Wellington	4

Rank among all 2-Digit NAICS industries. More detail on employment by sector by County is included in the appendix
Source: EMSI Analyst and Mellor Murray calculations.

The WOWC region health care sector is expected to see the most growth demand of all employment sectors by 2030. Based on EMSI/Mellor Murray estimates, the health care and social assistance sector is expected to add 11,206 net jobs by 2030 and require another 17,059 jobs to be filled as a result of replacement demand. In total, over 28,200 jobs are expected to be filled by 2030.

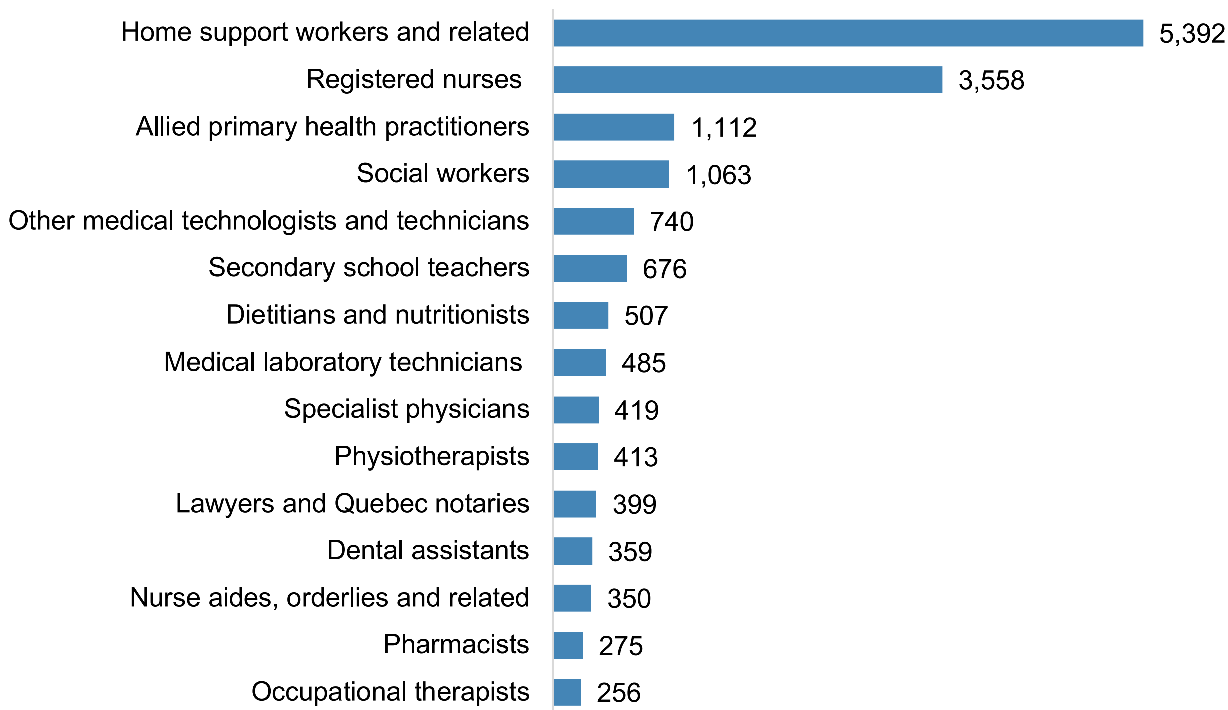
Table 6: Projected Health Care Employment Demand 2030

2020 Jobs	2030 Jobs	Replacement demand	Growth demand	Total demand
69,990	81,197	+17,059	+11,206	+28,265

Source: EMSI Analyst and Mellor Murray calculations.

A detailed analysis of the health care occupations anticipated to have the most demand over the next decade is beyond the scope of this report. However, a review of online job postings for the period January to June 2020 provides an indication of the current demand in health care occupations. Among the 445 four-digit occupational groups, there were more unique job postings in the home support worker sector than all other groups. Job postings related to nursing, allied primary health care workers and social workers all ranked in the top 10% of occupations with the most unique job postings.

Figure 11: Unique job postings by occupational group, January to June 2021



Source: EMSI.

Along with boosting enrolment in health care-related enrollment in the region's PSE sector, immigration will be an important source of labour over the next decade. However, many professions in the health care sector are regulated and, in many cases, the international training and experience of professionals is not recognized. The Ontario Office of the Fairness Commissioner is working to level the playing field ensuring that international health care professionals can better integrate into the Ontario workforce.

POST SECONDARY EDUCATION TALENT PIPELINE

Creating the workforce for tomorrow

5 Post-Secondary Education Talent Pipeline

5.1 Summary

There are 40 different college or university campuses located in the WOWC region including the separated cities. The post-secondary education institutions in the separated cities were considered part of the talent pipeline for the WOWC region. The colleges and universities with campuses are shown in Table 7. The region's colleges had 45,700 students enrolled in 2019-2020 while the universities had 88,900 students. In total there were 146,600 enrolled in these post-secondary education institutions in 2019-2020.

Table 7: Universities and public colleges with campuses in the WOWC region

Colleges	Universities
• Fanshawe	• University of Guelph
• Georgian	• University of Windsor
• St. Clair	• Western University
• Lambton	• Nipissing University -Brantford Campus
• Conestoga	• Wilfrid Laurier University-Brantford Campus
• Mohawk	• University of Ottawa-Windsor Campus
• Humber	• University of Waterloo-Stratford-Digital Media
• Collège Boréal	• Lakehead University (Orillia)
• Canadore	

Source: Ontario Ministry of Advanced Education and Skills Development.

There are also many other education and training institutions and companies in the region. According to Statistics Canada, in June 2020, there were 86 fine arts schools, 17 computer training schools, 65 professional and management development schools/firms, 34 technical and trades schools (in addition to the public colleges) and nine languages schools.

Table 8 shows the number of students enrolled in the region's universities and public colleges between 2012-2013 and 2019-2020. The total enrolment in colleges has risen strongly by 23% over the seven-year period. By contrast total university enrolment is up only 9%. In both cases, enrolment growth is below the overall growth rate for Ontario overall. Across the province total university enrolment increased by 14%.

Table 8 also compares the level of university and public college enrolment in the region relative to the enrolment in post-secondary institutions across the province. In 2019-2020, the WOWC region's colleges had 29% fewer students relative to population size compared to the province overall (index value of 0.71). The region's universities had 21% fewer students relative to population size compared to the province overall (index value of 0.79).

For both public colleges and universities, the relative share of provincial enrolment in the WOWC region has dropped slightly in the past seven years.

Table 8: Universities and public colleges with campuses in the WOWC region

Year:	College Enrolment	Ontario = 1.00	University enrolment	Ontario = 1.00
2012-2013	37,202	0.74	81,166	0.83
2013-2014	37,024	0.71	82,273	0.83
2014-2015	36,776	0.69	82,910	0.82
2015-2016	36,891	0.67	83,349	0.81
2016-2017	37,334	0.67	85,092	0.81
2017-2018	40,212	0.67	85,797	0.80
2018-2019	45,289	0.71	86,912	0.79
2019-2020	45,741	0.71	88,860	0.79
Enrolled student growth rate (2012-2013 to 2019-2020)				
WOWC region	**+23%**		**+9%**	
Ontario	+27%		+14%	

Source: Ontario Ministry of Advanced Education and Skills Development.

Among the public colleges, Fanshawe College has the largest number of students in the region with enrollment of 18,800 in 2019-2020, or 41% of the total. Fanshawe has also grown the fastest increasing its student enrolment by 4,600 between 2012-2013 and 2019-2020. A more detailed review is found in the Appendix.

Table 9: Public colleges enrolment in the WOWC region, 2019-2020

	2019-2020	% of total	% change ('13-'20)
Fanshawe College	18,830	41%	+32%
Georgian College	11,535	25%	+19%
St. Clair College	10,269	22%	+27%
Lambton College	3,238	7.1%	-7%
Conestoga College	1,498	3.3%	+202%
Humber College	200	0.4%	+5%
Collège Boréal	80	0.2%	
Mohawk College	77	0.2%	-93%
Canadore College	14	0.0%	

Source: Ontario Ministry of Advanced Education and Skills Development.

5.2 Key trends

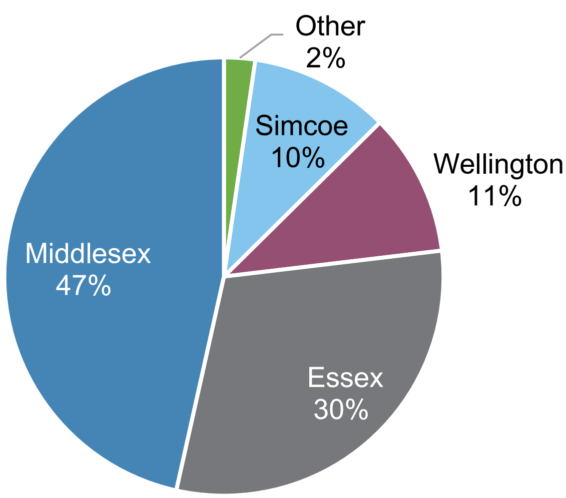
There are several important trends in the student profile of the region's universities and colleges that are positive for the future talent pipeline in the WOWC region (a more detailed review is found in the Appendix).

International students

Colleges and universities across Canada play an important role as conduits for immigration. Many smaller firms and organizations do not have the capacity to recruit internationally to meet workforce demand, but they would (and do) hire graduates from local colleges and universities. Having more international students enrolled in local schools creates a larger pool for local firms/organizations to recruit from.

The number of international students enrolled in colleges and universities across the study area increased significantly over the 2012-2019 academic years. Between 2013-2019, the number increased by more than double to over 11,000. Most of these international students are clustered in Essex, Middlesex, Simcoe and Wellington counties.

Figure 12: International PSE student enrolment by county, 2018-2019



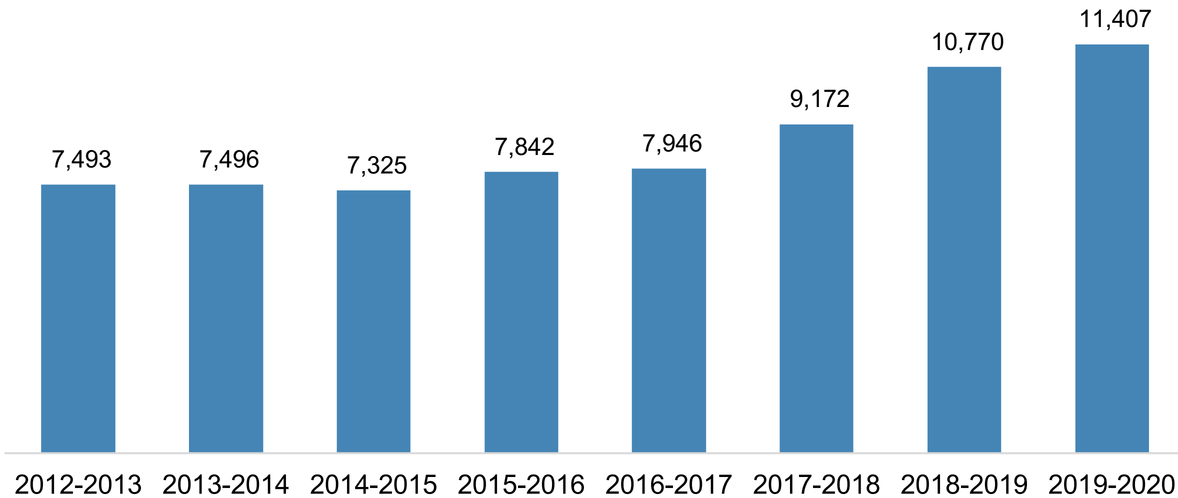
These figures include the separated cities of London (Middlesex County), Windsor (Essex County), Guelph (Wellington County) and Barrie (Simcoe County).
Source: Ontario Ministry of Advanced Education and Skills Development.

Mature students

The number of mature students (those aged 25 and older), enrolled in the region's post-secondary education institutions is on the rise. In the universities, there has been a modest increase in the past few years mostly in the younger age groups (25-34). There are very few in the 50+ age group enrolled in universities.

In the public colleges, mature student enrolment is up by 52% between 2012-2013 and 2019-2020 with the bulk of that increase in the past three years (Figure 13). The number of mature students aged 50 and older enrolled in public colleges has not increased in recent years.

Figure 13: Mature student enrolment (25+) by year, WOWC region



Source: Ontario Ministry of Advanced Education and Skills Development.

Programming trends

It is important to ensure that post-secondary education institutions are aligning their programming with workforce demand in the region. In recent years there have been a few high-level trends emerging:

- Decline in enrollment for programs related to Childcare and Youth Services at colleges. Steady enrollment in similar programs at universities, with an increase in education enrollment at the University of Western Ontario.
- General decline in enrollment in hospitality administration/ management, except for Georgian College, which has experienced an increase in students enrolled in Restaurant, Culinary, and Catering Management programs.
- Steady/increasing enrollment in business administration/management programs at colleges and universities. A significant increase in this program area over the timeframe is identified at Lambton College.
- Steady/ increasing enrollment in health care and promotion related programs. Notable increases include Gerontology Studies at St. Clair College, and Nursing and Medicine at the University of Western Ontario.
- Steady/ increasing enrollment in mechanics and maintenance programs, including technical engineering programs.

Among the public colleges, there have been some important trends:

- Fanshawe College's top program by full time enrollment is Early Childhood Education with enrolment rising by 30% in the past five years. Child and Youth Care is a relatively new program with over 400 enrolled. Practical nursing has seen enrolment dip slightly in the past five years. Information technology (IT) programs are mostly witnessing higher enrolment as are business-related programs.

- Georgian College's collaborative nursing program and practice nursing enrolment is declining. Business and IT program enrollment is increasing. Tourism-related program enrolment is on the rise.
- Lambton College is seeing rapid growth in enrollment in business-related programs but declines in health care-related enrollment. The computer programming course had 646 full time enrolled in 2019-2020 the second highest enrollment of any program in the college.
- St. Clair College is seeing rapid growth in enrollment in business-related programs but declines in health care-related enrollment. Enrolment in most health care-related programs is down including personal support worker, practical nursing (down modestly), paramedic and collaborative nursing. Early childhood education has seen a modest rise in enrolment in the past five years.

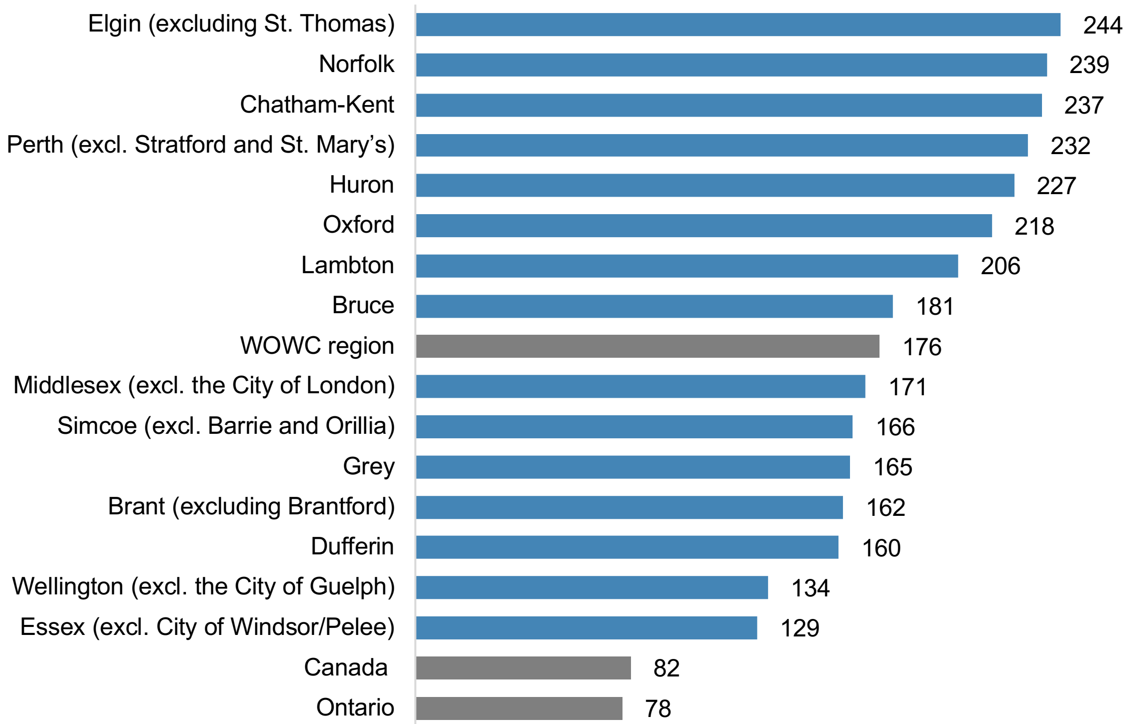
Additional detail is found in the Appendix.

5.3 Post-secondary education and the future talent pipeline

College education plays an outsized role in the WOWC region (excluding the separated cities). In 2016, there were 240,000 people in the region's workforce with a college or other non-university certificate or diploma as their highest level of education compared to only 136,000 with a university degree.

Figure 14 shows the ratio of college to university graduates in the WOWC region. Elgin County (excluding St. Thomas) has 2.4 times as many college graduates in the workforce compared to university graduates. Across the WOWC region there are 176 college graduates in the workforce for every 100 university graduates compared to only 78 per 100 across the province.

Figure 14: Number of college graduates in the workforce per 100 university graduates



Those with a college or other non-university certificate or diploma compared to those with a university certificate, diploma or degree at bachelor level or above. Does not include trades or apprenticeship certificates/qualifications. Source: Statistics Canada 2016 Census.

As shown in Figure 15, across the WOWC region there are 158 college graduates in the workforce for every 100 university graduates in the age group 25-34.

In the future, colleges will play an even more important role in the talent pipeline for a number of reasons including:

- Their role as a conduit for immigrant attraction. It is much easier for the region's employers to recruit immigrants out of the education system compared to engaging in international recruitment efforts.
- Their role addressing targeted workforce demand in areas such as health care, manufacturing and tourism.
- Their role in providing micro credentials.
- Their role in re-educating older workers.
- Their role in providing research support for key industries in the region.
- Their role as an incubator of entrepreneurship.

The role of Ontario's colleges in the years ahead is summarized in an important report published by the StrategyCorp Institute of Public Policy and Economy in June 2020[8].

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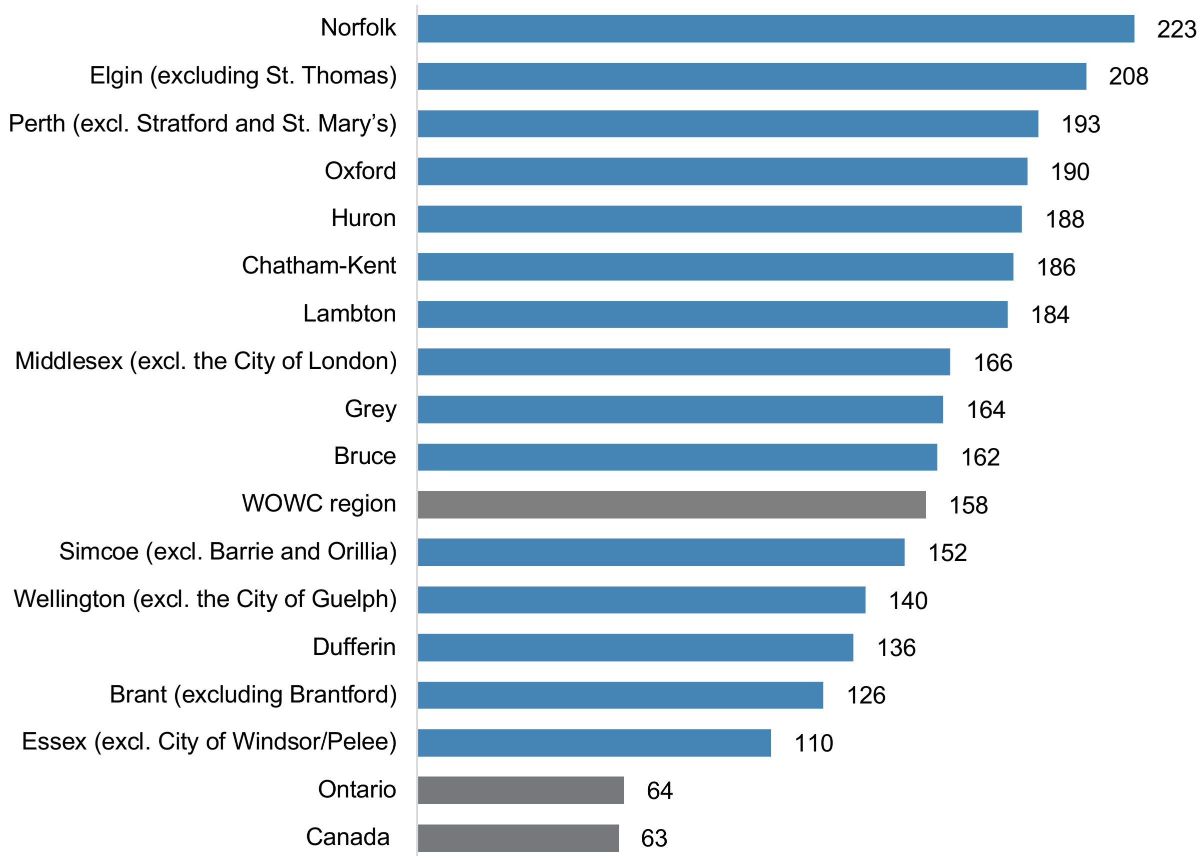
[8] https://www.collegesontario.org/en/resources/the-future-of-ontarios-workers

Figure 15: Number of college graduates in the workforce per 100 university graduates, Workforce aged 25-34



Those with a college or other non-university certificate or diploma compared to those with a university certificate, diploma or degree at bachelor level or above. Does not include trades or apprenticeship certificates/qualifications. Source: Statistics Canada 2016 Census.

5.4 People Attraction

The following section provides a high-level review of people or talent attraction efforts in the WOWC region along with case studies of three municipal initiatives within the WOWC[9]. Key trends are evident when comparing the different web-based approaches to information sharing across the region. Some municipalities have focused on workforce talent attraction as the primary portal for information. This is aligned with economic development and employer driven information. A few have taken a very new resident and newcomer lens and presented information with priority on welcoming and access to resource data to support new residents. Easy access to a contact for further information improves the navigation for users. There is a combination of measures that can be presented on-line that are considered helpful for attracting talent. The following table provides a summary of the talent attraction initiatives easily accessible via the municipal websites.

Table 10: WOWC Member Municipality People Attraction Efforts[10]

Jurisdiction	Resident/workforce attraction info on website	Personal contact info	Strategy on website	Resident attraction promotion	Resource links
Brant	✓		✓		
Bruce	✓	✓	✓	✓	✓
Chatham-Kent	✓	✓	✓	✓	✓
Dufferin					✓
Elgin	✓	✓	✓	✓	
Essex	✓	✓	✓	✓	✓
Grey	✓	✓		✓	
Huron	✓	✓	✓		✓
Lambton	✓	✓		✓	✓
Middlesex	✓	✓	✓	✓	✓
Norfolk					✓
Oxford	✓	✓		✓	✓
Perth	✓		✓	✓	✓
Simcoe	✓		✓		✓
Wellington	✓			✓	✓

Note: Links to the member municipality's resident attraction websites are included in the Appendix.
Source: Mellor Murray search of Municipal websites, August 2021

[9] A review of resident attraction best practices is included in the Workforce Strategy Background Discussion Report
[10] As determined via member municipal websites

Local Resident Attraction Initiatives

The consulting team's research has identified some important case studies that provide additional perspective and transferrable solutions. New resident attraction has been focused on workforce talent attraction through many County or local municipalities. This has been done through economic development within municipalities and through some specific programs. The following are highlights from four programs in the WOWC region.

Case Study: Work in Simcoe County

Simcoe County

https://workinsimcoecounty.ca/

Work in Simcoe County is a comprehensive web platform targeted primarily at prospective workers considering employment in Simcoe County, Barrie and Orillia. The website includes a searchable job board that can be filtered by occupation, job types, skill levels, duration, and community. At the time of this report there were over 3,000 individual job posts listed on the website. A job map allows visitors to search for jobs by community with a map-based directory.

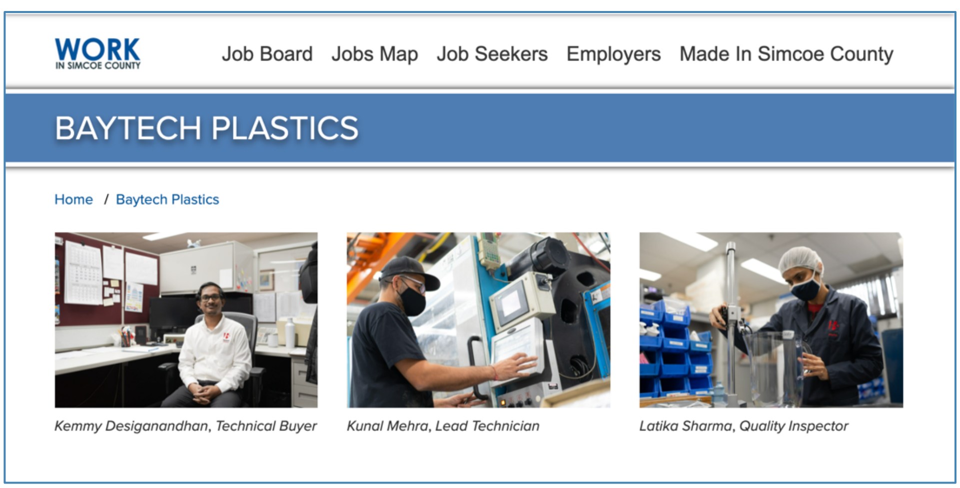
The website includes a variety of resources to support job seekers including job hunting tips, links to career fairs and a virtual skilled trades expo. It also includes subject specific resources for entrepreneurs, youth, newcomers and immigrants.

The site includes an interactive and PDF format job demand report highlighting high demand jobs. The monthly report is searchable by location, National Occupation Classification code and skill level.

Employers can find information on hiring help, apprenticeship and co-ops, hiring immigrants and research and innovation supports.

The site also includes the Made in Simcoe County campaign. The campaign includes profiles of the companies and careers that demonstrate that "Success is Made in Simcoe County". The page includes a series of videos that are embedded into the site. The videos are also available on the Made In Simcoe County YouTube channel and supported by the #MadeInSimcoeCounty hashtag for use in social media.

Figure 16: Made in Simcoe County Employer Profile



Source: https://workinsimcoecounty.ca/baytech-plastics/

Case Study: YMCA “WE Value Partnership” Newcomers Program

Windsor-Essex

This program is focused as a service provider for newcomers. The approach includes engaging with participants to learn more about them then a standardized assessment. Data is collected beyond basic skills to include employment history, education, occupation code equivalency and skill sets. The intention is to focus on alignment of workers with opportunities.

This program was initially established in Windsor, but due to its success, it is expanding to Sarnia, London, Owen Sound, Leamington, and Chatham. As a long-term strategy, this program supports overcoming a mismatch of skills as well as supporting emerging jobs.

Figure 17: WE Value Partnership

Source: https://www.ymcaswo.ca/we-value-partnership

Applications for a Regional Approach

There are several ways that this program can support regional implementation. The sharing of data with cities or communities in real time can better match upcoming workers and employment. Clients are assessed and data is shared quarterly, keeping current tracking of needs for faster adaptations.

Strategies include:

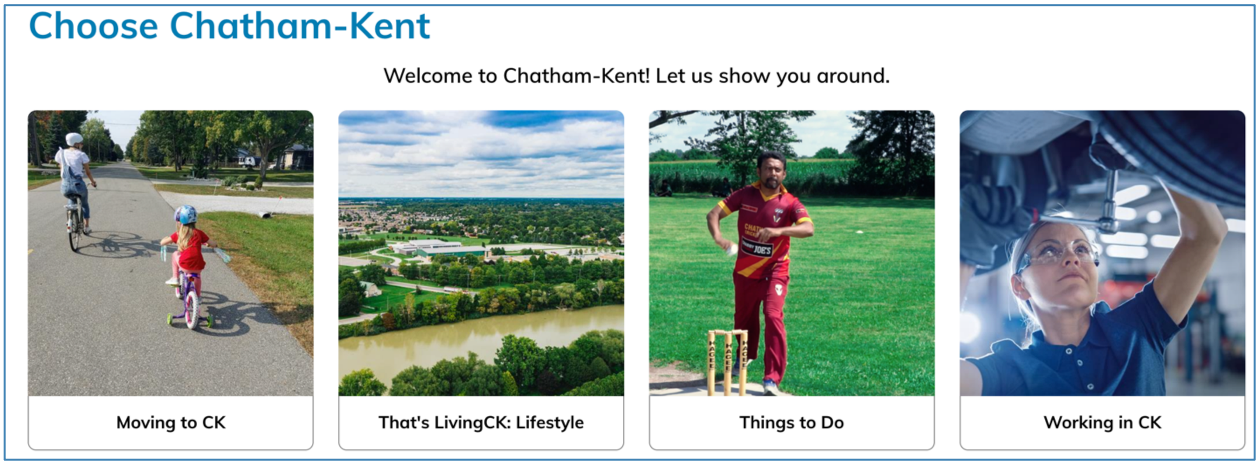
1. Sharing information with rural counties and communities, on who is in the community and how they can attract additional residents by understanding their needs
2. Providing more targeted information to plan workforce and housing strategies
3. Collaboration with larger centres and neighbouring counties

Case Study: Resident Attraction and Retention

Chatham-Kent, ON

The Municipality of Chatham-Kent has a four-person Community Attraction and Promotion (CAP) team responsible for resident and talent attraction and retention initiatives. The program includes focuses on immigrant attraction, repatriation of former Chatham-Kent residents, youth recruitment and retention and general resident attraction.

Figure 18: Chatham-Kent Living CK website



Source: https://www.chatham-kent.ca/livingck/chooseCK/Pages/default.aspx

The Chatham-Kent program addresses resident attraction targeting specific talent. The program considers three areas:

1. Community economic development – filling employer needs
2. Connection with prospective residents and providing a welcoming environment
3. Staying connected with residents and the pipeline of people growing up in Chatham-Kent, staying connected so they can remain or return

Chatham-Kent is one of three communities in Ontario participating in a Regional Immigrant Pilot program. The pilot program is intended to assist in filling local labour shortages by creating awareness of the program and increase uptake in rural and small communities. The program assists employers by connecting them with immigrant applicants based on employer need and applicant qualifications.

The CK CAP works closely with the Local Immigration Partnership, Adult Language and Learning College Boreal, the Chatham-Kent Workforce Planning Board, United Way and a variety of community groups and associations.

Chatham-Kent's Talent Attraction and Retention Framework includes seven components:

1. Employer Engagement
2. Research & Data
3. Marketing & Online Presence
4. Measure & Report on Impacts
5. Short Term Strategic Actions
    - Targeted marketing and outreach
    - Staff training, human resource supports and workforce supports
    - Recruitment supports
6. Community Orientations & Connections
    - For employers
    - For new and back to CK locals
7. Long Term Systems Change
    - Housing, broadband internet
    - Transportation
    - Immigration initiatives and welcoming community
    - Career planning and pathways
    - Elementary to post-secondary education, adult training and job/career preparation
    - Retraining and upskilling

Applications for a Regional Approach

The Chatham-Kent programing experience with the regional pilot identifies two important support areas:

1. Workforce development aligned with employer needs
2. Applicant skill matching

Connecting the employer and worker on skill matching provides an important step in aligning opportunity and availability. This combined with career pathway mapping can better support talent attraction and professional development.

As a region it is also recognized as a priority to lobby federal/ provincial ministries to support directing people to the region. Regionally this requires interaction and advocacy with both the provincial and federal governments to grow support and understanding of the local regional needs and opportunities. Some of the activities that support regional growth could include:

- New resident readiness/ market-ready kits,
- Promotion of community outside the region
- Oversees missions focused on human resources
- Missions into ethnocultural groups in GTA - Manufacturer missions abroad, such as Philippines, Taiwan, Thailand need to include full spectrum on implementation for travel, housing and other needs.
- Measuring programs and uptake to understand success and areas of focus

Case Study: Workforce Attraction and Retention Strategy[11]

Huron County, ON

The Huron County Workforce Attraction and Retention Strategy identified a direct correlation between the lack of workforce and the impact on economic growth of existing and new companies within the region.

The following key barriers were identified:

1. Awareness of real opportunities,
2. Lack of a range of housing options and
3. Lack of cultural diversity in the area

The available workforce is generally employed and to grow economically the County needs to invest in strategy for local municipalities to support new workforce. This approach considers the combined needs with supporting employers' confidence and ability to attract employees. Program funding addresses immigration, business training, pilots and small business growth.

These observations are consistent with the findings throughout the WOWC Workforce Strategy consultation and development.

Applications for a Regional Approach

The Huron County example addresses the complex set of factors surrounding attracting new residents and addressing employment by looking at comprehensive barriers. The regional workforce strategy research has shown a significant link between the three barriers identified. Emphasis on talent attraction regionally will benefit from an approach that aligns the employer opportunities with the workforce attraction and equally addresses the housing need. The housing need must provide the right range of housing options to support the workforce. Incentives to support training and business growth as well as support through activities, events and services that recognize cultural diversity will further provide a welcoming and attractive opportunity for those looking to settle in the region.

Talent Attraction Summary

The following identifies activities that can be led by Counties to promote talent attraction.

1. Working with local municipalities to attract specific newcomers = target sectors and community needs
2. Promoting applying to available programs and incentives
3. Diversity training, cultural awareness training to support employees or smaller communities to welcome diverse populations
4. Promoting quality of life for families in smaller centres
5. Focus on long-term settlement of immigrants who are more job ready than first comers.
6. Coordinate Connectivity Hubs - agreements with service providers through rural areas for internet, personal support, transportation innovation

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[11] https://www.huroncounty.ca/wp-content/uploads/2018/12/Huron-County-Workforce-Attraction-and-Retention-Strategy-2018-2020-V2-1.pdf

SMALL BUSINESS AND WORKFORCE DEVELOPMENT

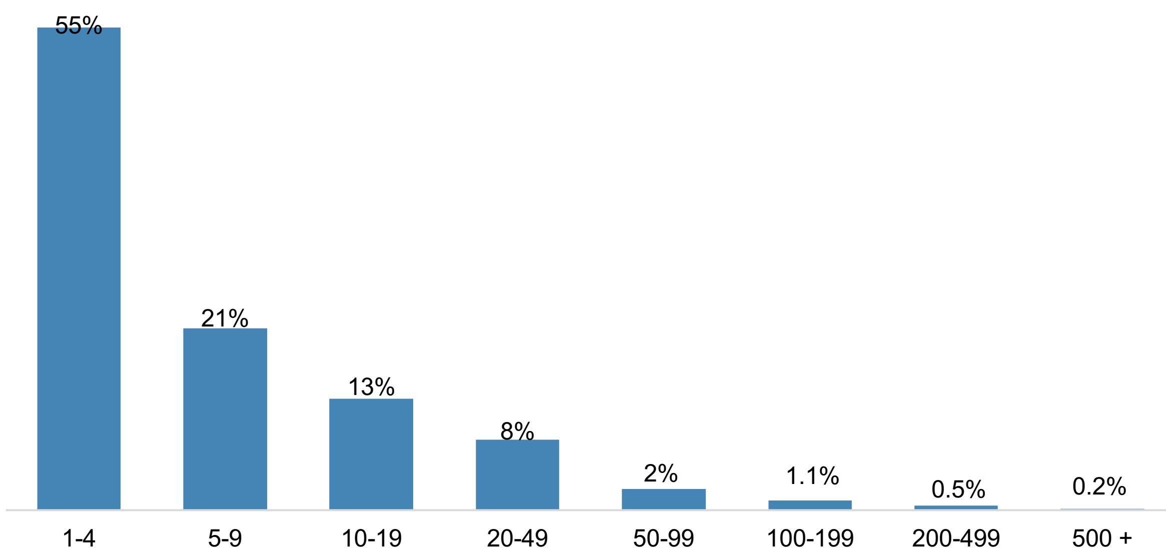
The backbone of the WOWC economy

6 Small Business and Workforce Development

6.1 The importance of Small Business in the WOWC region

Small and medium sized enterprises (SMEs) with less than 50 employees account for 96% of all enterprises (private and public sector) in the WOWC region[12]. Establishments with less than 10 employees account for 76% of the total (Figure 19). Smaller establishments potentially face greater challenges in the years ahead as they will have to broaden recruitment efforts, adapt human resources policies and offer higher wages and non-wage benefits to be able to compete with larger firms in the region. At the same time these smaller organizations tend to have less capacity to make these changes. Most SMEs do not have dedicated human resources/recruitment managers. Many will find it hard to recruit outside the local area.

Figure 19: Firms and organizations by employment level, % of total, WOWC region



Source: Statistics Canada location counts, June 2020.

6.2 SME workforce recruitment/development challenges

Prior to the COVID-19 pandemic, the Ontario Chamber of Commerce commissioned a report by the Public Policy Forum that outlined the extent of the challenges facing SMEs across Canada[13]. The report published data showing that over half of all employers with 5 to 99 employees were finding it difficult to hire new employees. When asked if the challenge was due to a skills or labour shortage (or both), 43% said both, 34% said skills shortage and 24% said labour shortage. Nearly half of the SMEs in the survey reported the lack of workers was holding back their firms' growth potential.

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[12] Definitions for SMEs in some analysis can include firms with up to 500 employees. This workforce strategy has applied a threshold of less than 50 because employers with larger number of employees will typically have formal Human Resources Departments and capacity for training, recruitment etc. that small firms do not. The needs of firms with under 50 employees is very different than those of larger firms.

[13] Small and Medium-sized Employers (SMEs): Skills Gaps and Future Skills (October 2020).

When asked about their relationship with the education sector, community colleges received the highest rating although only 41% of SMEs said they were very or somewhat satisfied with their relationship with the college sector.

Figure 20: SME satisfaction with educational institutions by type, % very or somewhat satisfied

Source: Small and Medium-sized Employers (SMEs): Skills Gaps and Future Skills (October 2020).

Governments and industry groups have recognized the challenges facing small businesses and have been developing programs to support their recruitment and training efforts. For example, the Ontario Chamber of Commerce offers the Talent Opportunities Program (TOP) designed to help employers hire college and university students on work placements by providing wage subsidies. The financial support is higher for under-represented groups including Indigenous people, persons with disabilities, newcomers, first year students, visible minorities and/or women in STEM (science, technology, engineering and mathematics careers).

The Chamber is also helping businesses expand their workforces by hiring persons with disabilities. The Discover Ability Network provides tools and supports through in-person workshops, webinars and online resources to help businesses understand:

1. The Accessibility for Ontarians with Disabilities Act,
2. Why and how to become a more inclusive employer, and
3. How to hire and retain persons with disabilities

The Ontario Chamber report made several recommendations that could help SMEs in the WOWC region adapt and thrive in this new environment including:

- Hire from more diverse groups. According to the report, SMEs are less likely to hire persons with disabilities, immigrants and other under-represented groups.
- Integrate training and career development into employees' personal development plans.
- Adopt new approaches to training including online skills development.
- Engage new tools for recruitment. There are new technology-based tools that make it easier for SMEs including MAGNET, developed by Ryerson University and the Ontario Chamber of Commerce

The Canadian Federation of Independent Business (CFIB), an advocacy group for small, independent businesses, consistently finds workforce recruitment at the top of its small business challenges survey (pre-COVID-19). In a 2019 survey, 50% of CFIB members in Ontario were very concerned about workforce recruitment challenges among skilled workers and nearly 30% among non-skilled workers.

In more recent reports, the CFIB stated that members are even more concerned about workforce challenges as the economy emerges from the pandemic, particularly in service and retail industries.

A focus group of Community Futures Development Corporations (CFDC) executive directors conducted for the development of this report confirmed these workforce challenges. The following observations were echoed by participants in other community workshops held across the region:

- There is considerable pressure to raise wages, particularly for entry level workers but for many firms this could significantly impact profit margins.
- Most SMEs in the region recruit locally and now realize they will need to expand their efforts.
- There is a lack of housing for workers attracted to the region.
- Most SMEs are willing to hire immigrants, but the process of international recruitment is daunting and time consuming.
- Specific sectors are facing more challenges than others including manufacturing, tourism, personal services, and retail.
- Some employers are already becoming much more proactive in seeking and developing talent.

WESTERN ONTARIO WOWC WARDENS CAUCUS | WORKFORCE STRATEGY

HOUSING REVIEW

The relationship between housing and workforce development

7 Housing Review

7.1 Context

Contextualizing the Study Area

Rural geography tied to urban centres

The WOWC study area can be characterized broadly by a large rural geography tied to small urban centres. This housing review and workforce strategy does not include, for the purposes of strategic recommendations, separated municipalities that are geographically located within some counties. However, where these cities do exist, they are often significant economic drivers for the area.

Agriculture, manufacturing, and tourism are important economic drivers

Generally, the study area is home to a high concentration of manufacturing workers and a large and thriving agricultural sector. In some parts of the WOWC region tourism is the dominant industry driving growth.

The current geography and economic trends place the WOWC member municipalities in the challenging yet opportunistic position to invite and welcome housing and community development that preserves agricultural lands, protects the natural environment, and fosters sustainable and resilient economic growth.

Expectations for Sustainable Growth

Balancing growth with economic, environmental, and social sustainability

The Province of Ontario sets the ground rules and directions for land use planning through the Planning Act and the Provincial Policy Statement (PPS). As upper and single tier governments, the study area municipalities implement the province's land use planning framework through Official Plans and land use planning decisions to support their communities' economic, social, and environmental objectives.

Local governments are faced with the challenge of providing and ensuring residents have access to attainable housing. Simultaneously, climate and environmental change are challenging municipalities to become more resilient, inclusive, safe, and sustainable to mitigate and adapt to impacts.

Individuals who do not have access to appropriate and affordable housing options are at the highest risk of adverse impacts of climate change. Integrating attainability and sustainability in housing is paramount to adequately addressing the climate crisis, increasing net zero regulation, and housing attainability. There is an opportunity to develop housing that is socially and environmentally equitable.

Figure 21: Study Area municipality Dufferin County

Source: Dufferin County (2021)

Population Projections

Aligning population projections with expectations for housing

The WOWC study area collectively includes 300 communities and approximately three million residents[14]. The population across much of the study area has been growing strongly in the past few years. However, the region's continued growth depends on a growing working age population as well as housing options that are attainable and suitable for the workforce.

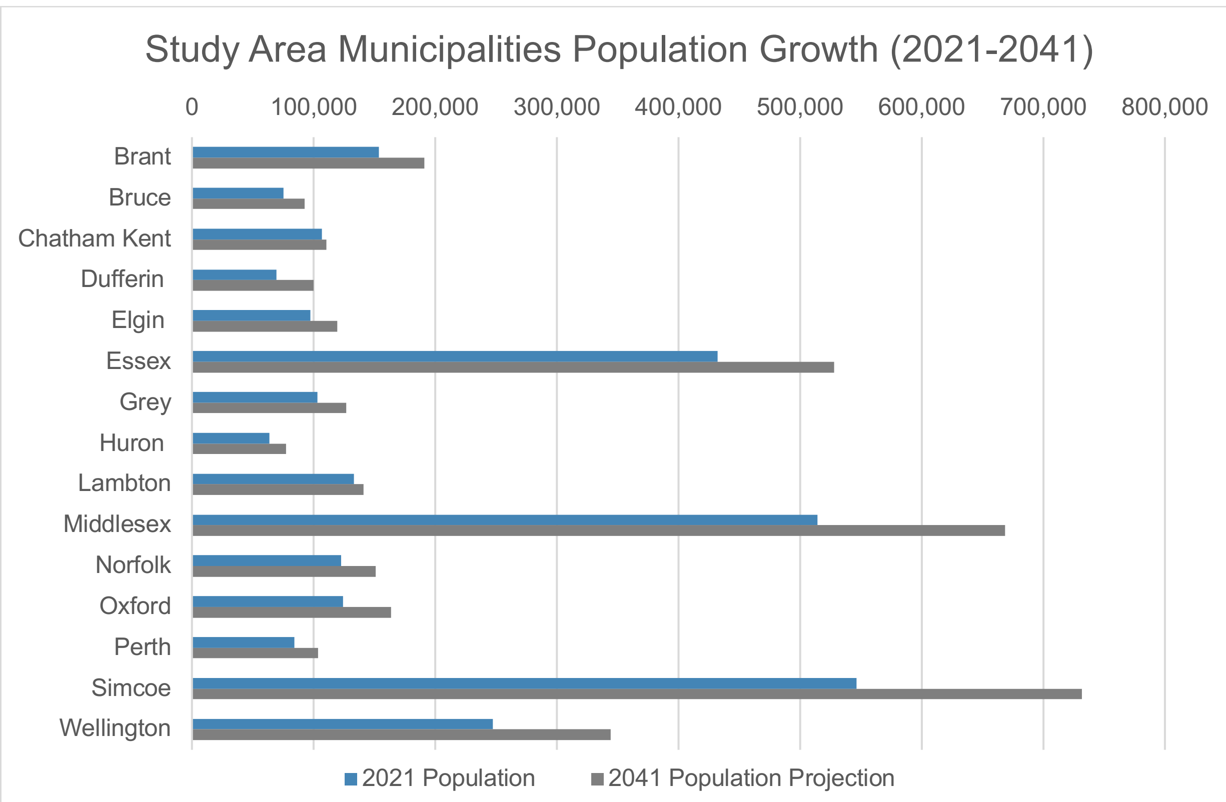
Demographic projections provide important insight into population growth trends and are therefore important for understanding and estimating future housing needs. To better understand the study area's future population and expected housing needs, population projections and housing needs analysis for the 15 municipalities has been compiled based on available data from Official Plans, population and housing reports supporting Official Plans, and Statistics Canada data based on Census Divisions.

[14] Including the separated cities.

Overall, the following population trends are based on study area municipalities in the following categories:

- **Zero to 20% growth** – For the 2020-2046 period, Chatham-Kent and Lambton Counties are projected to experience population growth between zero to 20%.
- **Twenty to 30% growth** – For the 2020-2046 period, Brant, Bruce, Elgin, Essex, Haldimand-Norfolk[15], and Grey Counties are projected to experience population growth between 20 to 35%.
- **Over 30% growth** – Dufferin, Middlesex, Oxford, Simcoe, and Wellington Counties are projected to experience population increase by over 35% between the 2020-2046 period.
- Average household size ranges from 2.3 to 2.6 individuals (based on 2016 census data).
- There is a lower percentage of residents between 20 and 49 years of age compared to the province overall, and a rapidly aging population in the study area
- Population is typically concentrated in small urban centres with remaining population occupying rural areas.

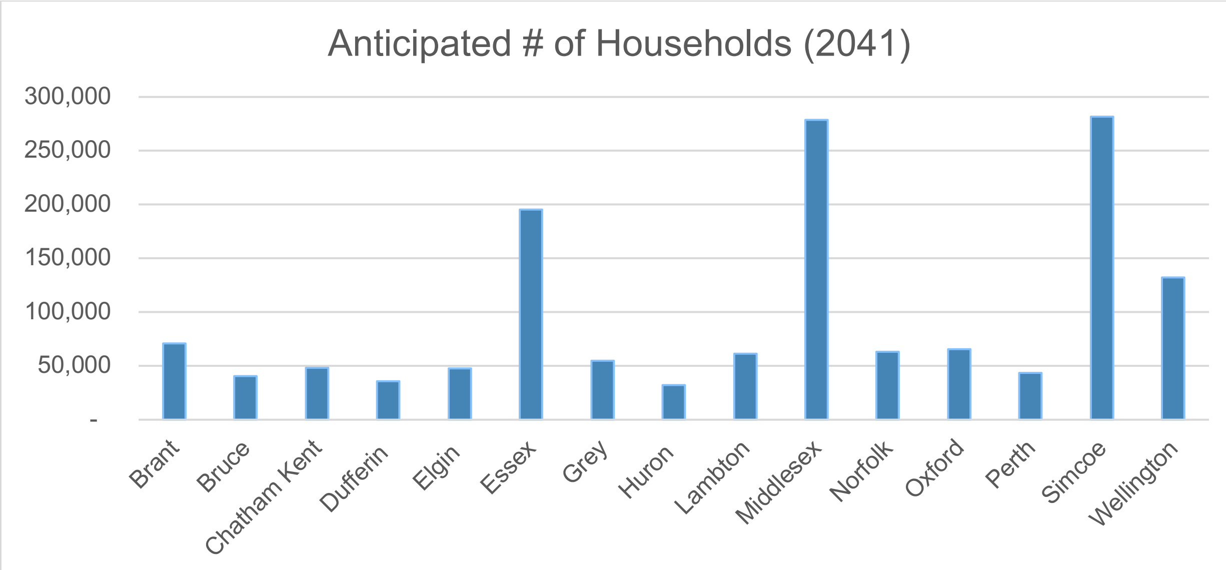
Figure 22: Population Growth for Study Area Municipalities



Source: Ontario Ministry of Finance. (2021). Population projections by age and sex for the 49 census divisions These population projections include the separated cities. Additional County level detail is available in the appendix. https://data.ontario.ca/dataset/population-projections/resource/03abe0d5-0995-4ce2-ad9d-e904d50106a5

[15] Statistics Canada combines the census data for Haldimand and Norfolk Counties.

Figure 23 Anticipated Number of Households for Study Area Municipalities



Source: Mellor Murray/Prime Strategy & Planning calculations using Ontario Ministry of Finance Projections 2021, and Statistics Canada Census data.

Table 11 Population and Workforce Trends

Growth	County/Municipality	Work/Labour Force
0-19%	• Chatham-Kent • Lambton	• Strong manufacturing, agriculture and health care sectors • Older population and workforce
19-29%	• Brant • Bruce • Elgin • Essex • Grey • Haldimand-Norfolk	• Strong manufacturing, utilities, and agricultural sectors
30%+	• Dufferin • Middlesex • Oxford • Simcoe • Wellington	• Proximity to rapidly growing urban centres • Growing professional services sectors

Housing Trends

Direct research with municipal partners and secondary research informs housing trends for the study area

A review of Official Plans, housing strategies, plans, and policies from the study area municipalities, as well as research reports specifically focused on the WOWC region and direct research with industry leaders and municipal partners informs the housing trends analysis for the study area. The Appendix provides this research in further detail. In summary, the following housing issues and trends appear in the study area:

House prices are rising across member municipalities – Several counties reported booming housing markets prior to and during the COVID-19 pandemic. Where smaller markets previously had an affordability advantage over larger cities, the price advantage has decreased during the pandemic as housing demand, home sales and prices have increased in the WOWC region.

Affordability and availability are two prevalent concerns – Housing in several municipalities has become unaffordable, not only for low-income individuals and families, but also among middle-income earners.

Most households are homeowners, with some renters – Homeowners outnumber renters in all municipalities based on Statistics Canada data. Data from study area municipalities suggests that the ratio is changing in some areas, as the percentage of renters increases.

Employment trends influence the demand for affordable housing – In addition to the cost of housing, COVID-19 has shifted employment trends. Individuals working from home are seeking affordable housing options outside of the municipalities where their employment is located. At the same time, shifts in major economic drivers, such as the Bruce Power Refurbishment project and the related employment, continue to increase the overall demand for housing, particularly among the workforce.

Access to affordable housing is critical to improve economic stability, health, and wellbeing – There is a general acknowledgement across member municipalities about the interconnectedness of housing and access of employment and services. Developing suitable housing options for the workforce requires consideration of several issues, such as accessible services, and attainable housing.

Housing stock and starts are typically single detached dwellings – Statistics Canada data and available housing reports show that the existing and new housing stock is not diversified. Data from the study area municipalities suggests that the housing stock mix is changing, with the share of new single-detached dwellings declining and the share of row houses and town houses increasing.

Location and lack of transportation issues are emerging issues – Limited public transportation makes it difficult for some people to find and maintain housing while sustaining employment. Affordable housing is often found in smaller, outlying areas where access to employment, services, and support is impossible without automotive transportation.

Servicing requirements per household – Restrictions on the number of individuals living in individual units are often determined by servicing capacities, particularly for septic systems. Short-term rental allowances permit a greater number of individuals to occupy a unit over a short period of time than service allowances for long-term tenants permits. This situation places imbalanced restrictions on the number of individuals that can live in a home permanently versus those who can occupy a rental unit for a short period of time.

7.2 Defining the Workforce for the Housing Analysis

The workforce is broad, diverse, and will continue to change

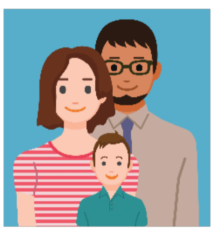
In this housing review the workforce is generally represented by individuals aged 25 to 55 years. The study recognizes a component of the workforce includes older individuals looking to maintain roles either full or part time. This includes the population aged 55 to 65 and 65 to 75. The workforce is, and will continue to be, broad and diverse in terms of the economic and social composition as the study area will continue to experience change. However, based on the research, there are some recognized broad, identifiable trends relative to the current and/or future workforce population and their housing needs.

Personas offer a human-centred approach to characterizing the workforce

This analysis uses five personas developed by Mellor Murray for this study to broadly capture the current and potential workforce employed and living in the study area. The personas were developed based on assumptions made by the team by combining common characteristics to help understand the workforce. There is anticipated overlap between different personas in terms of individual experience, and these personas may not capture the experience of every individual in the workforce but can be considered generally.

The personas are intended to guide the housing review and strategic recommendations from a human-centred perspective that provides local governments with several pathways to develop workforce housing that is responsive to current and future user needs.

Workforce Personas

	**Entry-level workers** – This persona includes individuals who are at the beginning of their careers, including some older and younger individuals who may be starting out. Their income potential is significant as they emerge from entry-level positions. They may have more progressive expectations of worker experience than other workforce personas.
	**Newcomers –**Newcomers' access to appropriate and affordable housing increases the longer they live in Canada, and these rates are improved if they have family already in Canada. Newcomers continue to face multiple barriers when accessing housing, including limited language skills or income levels, as well as discrimination based on ethnicity, race, or culture. They may also be individual international students looking to settle and bring other family.
	**Families –** Many individuals within the 25 to 55 aged workforce will be a part of families of all compositions, including couples, single parents, and multi-family households with and without children. Young growing family workers need larger housing options or opportunities to transition up in the housing market.
	**55+ workers –** This persona includes individuals exiting the workforce that may be looking for part time or more flexible work opportunities. They are workforce mentors and may provide important technical or long-range experience for companies with a younger workforce.
	**Temporary and/or seasonal workers –** The current workforce includes temporary and/or seasonal workers who are employed in sectors such as agricultural and tourism. They are often employed in contractual and/or seasonal work and seek housing to accommodate shorter-term housing needs.

7.3 Attainable Housing

What is Attainable Housing?

Attainable housing is broadly defined across the diverse study area.

Within the context of this housing review, “attainable housing” is understood within the context of Canada Mortgage and Housing Corporation’s (CMHC) definition of “affordable housing”. CMHC considers housing affordable when a household spends less than 30% of its pre-tax income on adequate shelter[16]. It includes housing provided by the private, public, and not-for-profit sectors, as well as all forms of housing tenure (e.g., rental, ownership, cooperative ownership). It is widely felt that additional costs are limiting, such as access to services and transportation related costs to connect living and working travel.

Diverse range of housing typologies and tenure options

A specific definition of attainable housing for the study area does not exist. In the absence of a universally accepted definition, this review relies on Wellington County’s description of attainable housing, which refers to the type of rental or ownership units which the study area’s workforce is trying to obtain[17]. It refers to market housing of various built forms and densities, which is attainable for the resident and satisfies their needs. Attainable housing should not be confused with social housing which is subsidized by the government.

Why the Study Area needs Attainable Housing

New and existing residents need attainable housing and accessible amenities and services

The labour demands of businesses in southwestern Ontario are evolving. The current population age 25 to 55 is not sufficient to meet the current workforce demand. At the same time, there are significant economic and demographic shifts occurring. The baby boomer generation has begun to retire, and workers are needed to fill their roles as business owners and skilled labourers. COVID-19 and the resulting lockdown has caused employers and workers to reconsider previous business models, providing opportunities for a remote or relocated workforce.

It is important to recognize and understand the diverse ways in which individuals and households experience affordability challenges. For example, families may experience different challenges than single-person households. These groups may also be over or underrepresented in different parts of the study area.

To welcome new residents, municipalities in the study area must be welcoming and provide attainable housing, health and education services, internet capacity, community amenities, and other necessities suitable for future communities.

Housing Research

This housing review includes a summary of secondary research to understand housing trends and expectations broadly for Canada, Ontario, and the study area. The analysis includes data from

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[16] Canada Mortgage and Housing Corporation. (2018). *About Affordable Housing in Canada.*
[17] Wellington County. (2019). *Attainable Housing Strategy.*

Canada Mortgage and Housing Corporation (CMHC), Statistics Canada, and other organizational data from municipalities and research organizations.

This information helps to set the expectations for housing and to contextualize direct research performed as part of this review with industry leaders and municipal partners on attainable housing for the study area.

Direct Research with Industry & Industry Partners

General housing trends for Canada, Ontario, and the study area help to establish expectations for housing.

In addition, the analysis includes direct research with industry leaders and a series of community workshops to gain additional insight into the expectations for attainable workforce housing opportunities. Industry leaders were asked to provide their insight on workforce barriers and opportunities. Key findings from the interviews follow:

- The attainable housing definition is not consistent with what individuals earn versus the cost of housing. Using CMHC guidelines of 30% of household income for housing and related expenses, sets a false perspective on what people are spending on housing. A current and growing trend in the region is to “drive until you qualify”.
- The relationship between where individuals work and where they live is important. There is a mismatch between housing and job opportunities in terms of who is purchasing/ occupying new development in the study area. New housing stock is often being purchased by individuals who work outside of the municipalities in which they are purchasing. This raises questions about the attainability of housing for local residents who previously resided in the region. This is important to consider relative to housing attainability to the local population (including the local workforce) versus individuals who are employed elsewhere.
- Major population growth, particularly among newcomers to Canada, will continue in major cities such as Mississauga, Brampton, and Toronto. The study area will continue to experience the impact of population growth in these cities. Moving forward, municipalities in the study area should focus on building the community they want for the future.
- The workforce is dominated by the working family cohort. This demographic requires family size housing units. At the same time older generations are not moving out of their family size homes as the population ages, creating a lack of the larger size spaces families need.
- Additional workforce housing could be provided in new and existing (retrofit and infill) developments.
- Understanding developer needs is important to attract development. Developers need to see a return on investment and efficiency in the development process. Therefore, places with population growth and scale and servicing costs that will permit a return on investment, as well as streamlined permitting processes are important.
- It is important to consider who bears the burden of the cost of development. Increasing costs to develop ultimately transfers to the purchaser of the residential unit and may impact attainability.

- The housing industry needs planning processes that have predictability in approvals for timing and cost. This is a primary factor that is not consistent across municipalities and is necessary to support builders risk profiles where they may consider building in new or smaller communities.

Consultation with Stakeholders

In addition to direct consultation with industry leaders, the review process included consultation with a diverse range of municipal partners and other public and private sector groups. The main comments related to housing from the stakeholder consultation are summarized below:

- Interest in diversity of housing and policy tools to support housing diversity.
- Range of expectations for what is attainable.
- Lack of short-term rental units
- Lack of housing to transition to from rental to home ownership
- NIMBY[18] response to a range of housing options within stable communities and in general found throughout municipalities.
- Opportunities for rental matching, Seniors, students, and co-living model
- The development industry relies on a workforce of trades and apprenticeship, and access to materials. This is seen as a challenge particularly in high-growth areas.

[18] NIMBY is the acronym for not in my backyard, and refers to residents who do not want a particular type of development, housing or program in their neighbourhood

7.4 Best Practice Models for Attainable Housing

The review of housing best practices provides the basis for considering approaches that each county can consider in the workforce strategy. The different models outlined below include case studies of initiatives already happening within the Province of Ontario as well as in some instances, directly within the study area. Each example from best practice is summarized to include a description of the opportunity for WOWC members and potential actions for implementation as part of the WOWC workforce strategy.

Municipal Approaches to Attainable Housing

Not-for-Profit Corporation Description	
The Blue Mountains Attainable Housing Corporation is a not-for-profit corporation providing rental and ownership housing to working moderate income earning households.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Affordability challenges for middle-income earners • Rental and ownership options • Located within the study area	• Define attainability relative to the local context • Develop a suite of programs targeted towards specific users • Consider partnerships and transitional housing opportunities • Down payment assistance

Additional Residential Units Description	
Brant County's Additional Residential Unit (ARU) Guide is a how-to guide for homeowners who are interested in developing and building an ARU on their property.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Updates to restrictive zoning by-laws • Response to a lack of housing typologies and options for renters • Addresses lack of community knowledge about increasing housing options through private ownership • Located within the study area	• Develop new and/or update existing policies to permit flexible housing options in existing units • Understand servicing needs to permit ARUs on existing properties • Develop communications materials for residents to understand flexible housing options available and how to implement ARUs on their properties

Attainable Housing Strategy Description	
Wellington County's Attainable Housing Strategy provides financial and policy recommendations to assist the County with its attainable housing shortage.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Recognizes and responds to the link between workforce attraction and attainable housing options • Located within the study area	• Define attainable housing based on needs of the local population • Consider policy-based recommendations and financial incentives to support the creation of housing • Lead by example by providing opportunities for attainable housing development

Housing Strategy Description	
The City of Brampton's Housing Strategy and Action Plan identifies four "big moves" to reduce barriers to the supply of housing, including increasing purpose-built rentals, using public land for housing, providing attainable home-ownership options, and establishing clear housing targets.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Attainability and affordability challenges, particularly for vulnerable groups • Increased rental housing	• Link challenges to housing attainability with strategies that have clear targets for population growth and housing units required • Consider using public land for housing opportunities • Consider infill and co-development opportunities with municipally owned and operated facilities • Consider ownership and rental models

Community Services Hub Description	
The Collingwood Social and Community Services Hub is a multi-service location with affordable housing units and community services that was developed in partnership with public, private, and non-profit partners to support successful tenant outcomes.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Addresses need for attainable housing located near to accessible services • Partnership driven • Located within the study area	• Partnership opportunities with service agencies and other levels of government • Co-locate housing options with necessary community services

Land Trust Description	
Opportunity Villages Community Land Trust is a modern life-lease small home community model that will offer accessible pricing at 10% below current market value for all 30 units at the Brickworks location in Chatham-Kent.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Providing alternative housing typologies • Providing attainable housing option • Located within the study area	• Zoning by-law permissions for CLTs • Partnership opportunities to develop CLTs • Waiving planning application fees to incentive construction of CLTs

First Time Home Buyers Assistance Description	
The First-Time Home Buyers' Assistance Program is a program developed by C.R. Crozier & Associates to support employees with the purchase of a home through a $20,000 down payment contribution.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Private firm supporting employees • Located in the study area • Private sector led initiative	• Partnership models with private sector employers to provide housing for the workforce • Encourage employers to support employee housing opportunities

Housing Co-op Description	
Local 75 Hospitality Workers' Housing Co-Op is an 11-storey building with 85 co-op units built in partnership with Toronto Community Housing and Local 75 specifically for the workforce registered with Local 75.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Supply challenges linked to unaffordability and attainability • Address workforce specific housing by partnership	• Encourage local housing champions to lead specific projects • Eligible residents identified • Consider partnerships with employers to develop workforce-specific housing where appropriate for the workforce • Co-locate housing with community amenities and/or employment specific services

Housing Authority Description	
The Whistler Housing Authority (WHA) requires that developers of new commercial, tourist, or industrial properties build accommodation for future employees or provide cash-in-lieu for WHA to build workforce housing.	
Direction for the Housing Review	
Opportunity	**Implementation Strategy**
• Attainability and affordability challenges for specific workforce • Presence of tourism industry	• Consider partnerships with employers to develop workforce-specific housing where appropriate for the workforce • Co-locate housing with community amenities and/or employment specific services • Consider developing ownership/occupancy requirements to ensure housing remains attainable to workforce (if developed for specific workforce population)

Policy Tools Description	
The City of Kingston supports the development of secondary suites and tiny homes through its regulatory framework (e.g., zoning by-laws) and pilot projects with the City as a project partner.	
Direction for the Housing Review	
Opportunity	**Implementation Strategy**
• Short term housing needs for rental • Partner to ensure workforce use	• Consider the limitations of zoning by-law amendments to permit or restrict certain types of housing • Consider the needs, income, and attainability of residents when planning for housing typologies

Housing Design and Construction

Co-Living Description - Ottawa	
The Zibi master planned community in Ottawa includes a dedicated co-living building led by co-living company Common Living, which will feature small, private living quarters with shared bathrooms, kitchens, lounges, and other common amenities.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Flexible common needs housing model	• Consider the co-living model as a suitable housing typology for specific users • Multiple workforce needs could be met – students, apprenticeship, seasonal

Co-living Description - Kitchener	
Co-living provider Node is developing a co-living building in the City of Kitchener that will offer 38 private apartments for approximately 50 residents with several common amenities geared towards the tech-heavy industry in Kitchener.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Complete community flexible model building	• Consider the co-living model as a suitable housing typology for specific users or to bring together multiple workers

Mixed Building Condo and Rental Description	
The Artscape Bayside Lofts were developed in partnership with the City of Toronto, Hines-Tridel, and Artscape to provide artists and artist-led families with affordable housing choices that enable them to live and work in the City of Toronto.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Partnership model integrated with other ownership in complete community	• Consider partnership opportunities with non-profits and/or the development industry to produce industry-focused housing options • Mixed building could support efficient community acceptance and approval

Laneway Suites Description	
The City of Toronto's Affordable Laneway Suites Program provides funding in form of a forgivable loan of up to $50,000 for eligible property owners developing a laneway suite.	
Opportunity	Implementation Strategy
• Infill in existing communities	• Consider options for infill development within established neighbourhoods and/or built-up areas • Encourage housing opportunities in areas with existing community services • Community engagement strategy needed

Innovative Practices in Housing Construction

Figure 24 Modular housing at 11 Macey Ave. in Toronto, ON

Modular Housing Description	
Modular housing is built off-site and assembled on-site typically for infill projects dedicated for low-income households, such as students or young professionals.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Expedite purpose-built housing • Efficiency construction to expedite housing to meet design specific needs	• Consider partnerships with modular housing builders to develop modular units where appropriate • Consider expedited approvals to streamline the development of modular housing

Tiny Homes Description	
Tiny homes are small, private, self-contained, year-round residential dwelling units that may be stand-alone residential structures or as an additional unit on an existing property.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Expedite purpose-built housing	• Consider zoning by-law and Official Plan amendments (e.g., minimum flood requirements) to permit development of tiny homes • Engage with existing residents to understand opportunities for tiny homes on existing property

7.5 Profile of Housing Costs

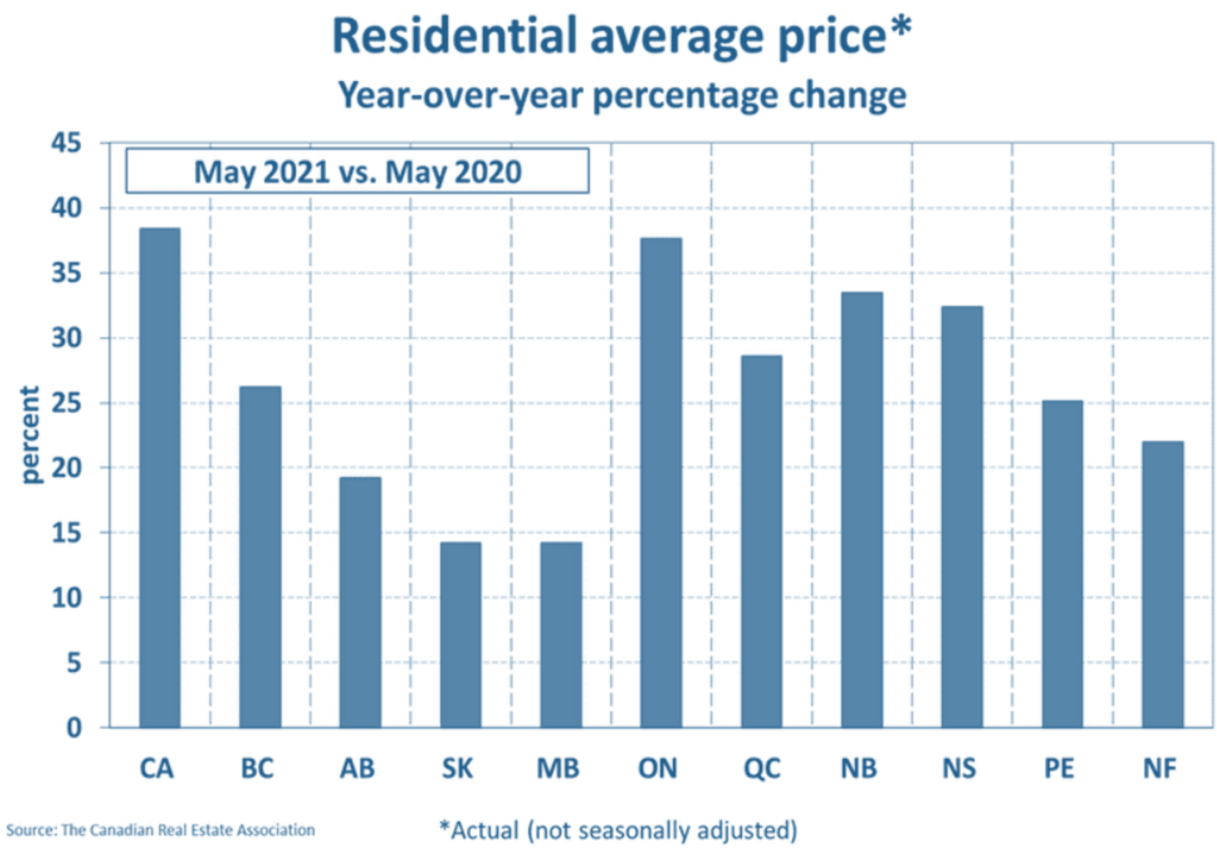
This section provides a review of housing costs to inform a better understanding of attainable housing in the region. This review includes indicative data for real estate home sales and the rental market.

Homeownership

The residential housing market has seen significant change and growth over the last several years and Ontario has experienced the greatest percentage increase across Canada.

According to the Canadian Real Estate Association, Ontario experienced a 20% average increase in residential prices prior to the 2020 pandemic year. As shown in Figure 25, there was an almost 40% increase in the average residential price from May 2020 to May 2021, adding to the widening gap between home prices and income for attainable housing.

Figure 25: Changes Average Residential sales price, May 2021 vs. May 2020



Source: Canadian Real Estate Association

Figure 26 provides a review of home buyers' anticipated purchase prices in Ontario. The average price for likely homebuyers was up across Ontario. In the WOWC region, the average anticipated purchase price in the southwest was $520,289 up $87,416 from the previous year while Central Ontario's average anticipated purchase price was $532,198 up by $73,774. These average prices would most likely reflect smaller family sized units with approximately two bedrooms.

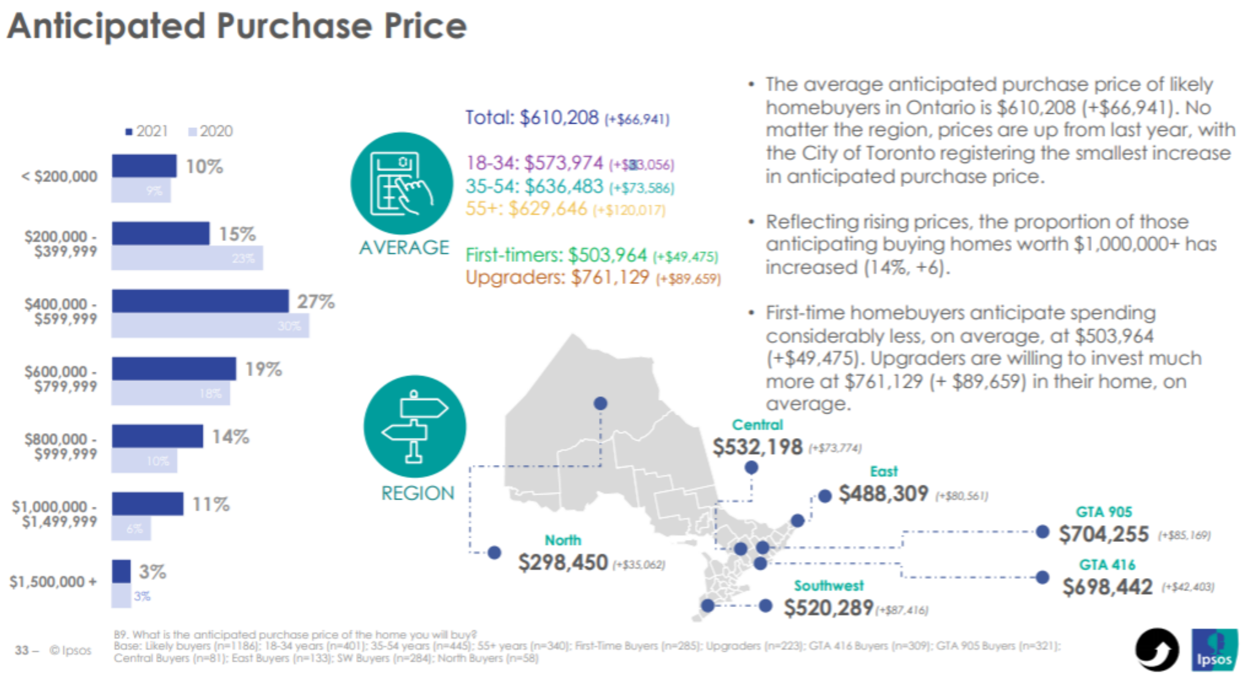
According to the Ipsos data first time home builders, likely representing the lower age range of the workforce, anticipate spending just over $500,000, up by $49,475 from the previous year.

For comparison anticipated purchase prices in Eastern Ontario were lower than those in the WOWC regions in Southwestern and Central Ontario at $488,309, however change average anticipated price was much greater at $80,561 from the previous year.

On average home buyers in Ontario aged 18 to 34 expected to pay an average of $573,974, up $83,056 from 2021. Those aged 35 to 54 expected to pay $636,483, up $73,586.

Looking at the change in anticipated prices by price category, the greatest anticipated increase of anticipated home prices was in homes priced between $400,000 and $600,000[19]. The anticipated prices of these homes increased by 27% in one year and the largest increase by price category.

Figure 26: Anticipated Purchase Price in Ontario 2020 to 2021



Source: Statistics Canada. Table 34-10-0133-01. Canada Mortgage and Housing Corporation. Average Rents for Areas with a Population of 10,000 and over. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3410013301.
Statistics Canada. Table 34-10-0127-01. Canada Mortgage and Housing Corporation. Vacancy Rates, Apartment Structures of Six Units and over, Privately Initiated in Census Metropolitan Areas. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3410012701.
Canada Mortgage and Housing Corporation. (10 May 2021). Rental Market Survey Data Tables. https://www.cmhc-schl.gc.ca/en/professionals/housing-markets-data-and-research/housing-data/data-tables/rental-market/rental-market-report-data-tables.
The Canadian Real Estate Association. (16 Aug 2021). National Statistics: Canadian home sales continue to normalize in July. https://creastats.crea.ca/en-CA/

[19] The typical price range form homes in Southwestern and Central Ontario (the WOWC region).

Calculating Attainable Housing for a First-Time Home Purchase

According to the Ipsos study the average first-time home purchaser anticipates spending just over $500,000. A $500,000 home, with the minimum required $50,000 down payment, at a 2% mortgage rate with a 5-year term, amortized over 25 years would result in a $2,366.23 monthly mortgage payment.

At this rate, a prospective homeowner would require an annual household income of $94,649 to meet CMHC's attainable housing threshold of spending 30% of the household income on housing. (This calculation does not include heat and hydro costs).

Calculated using the Government of Canada Mortgage Calculator
https://itools-ioutils.fcac-acfc.gc.ca/MC-CH/MCCalc-CHCalc-eng.aspx

The Ontario Real Estate Association reported that there were 19,332 residential sales in from August 2020 to July 2021, an increase of 32.2% from the previous year in Western Ontario[20] (Table 12). There were 28,483 residential sales in Southern Ontario[21], for an increase of 40.3% over the previous year while in Eastern Ontario[22] there were 19,650 sales an increase of 32.7% from the previous year.

Table 12: Ontario Residential Sales YTD July 2021

Ontario Year-To-Date Summary				
YTD 2021	Residential Sales	Year-Over-Year % Change	Residential Average Price	Year-Over-Year % Change
Central[1]	83,301	67.6	$1,086,753	19.2
Eastern[2]	19,650	32.7	$598,576	29.3
Northeastern[3]	16,958	36.1	$749,955	35.0
Northern[4]	7,111	42.3	$316,388	25.0
Southern[5]	28,483	40.3	$773,788	29.3
Western[6]	19,332	32.2	$576,492	36.5
Ontario	174,835	49.6	$860,478	27.8

Source: https://creastats.crea.ca/board/orea

[20] Including Chatham-Kent, Grey Bruce Owen Sound, Huron Perth, London & St. Thomas, Sarnia-Lambton, Tillsonburg District, Windsor-Essex, Woodstock-Ingersoll
[21] Including Brantford Region, Cambridge, Guelph & District, Hamilton-Burlington, Kitchener-Waterloo, Niagara Region, Simcoe
[22] Including Bancroft & District, Barrie & District, Kawartha Lakes, Muskoka Haliburton Orillia, Northumberland Hills, Parry Sound, Peterborough and the Kawarthas, Quinte & District, Southern Georgian Bay

Rental

Table 13 shows the average rents in communities with population of over 10,000 people in the WOWC region compared to larger urban areas in Ontario. Data has been selected for communities within the study area compared to the City of Toronto, Barrie, Guelph, Hamilton, Kitchener-Cambridge, and Kingston.

Rents in all the larger centres, are comparably slightly higher than in smaller communities except for Collingwood which has rents comparable to the larger centres. Communities in the study area such as Chatham-Kent, Essex, Kincardine, Midland, Meaford, Norfolk and Tillsonburg have rents in a comparably lower range.

Table 13: Average rents, WOWC communities with 10,000+ population and select Ontario cities, year

Canada Mortgage and Housing Corporation, average rents for areas with a population of 10,000 and over												
	Bachelor Units			One Bedroom Units			Two Bedroom Units			Three Bedroom Units		
Geography	2018	2019	2020	2018	2019	2020	2018	2019	2020	2018	2019	2020
Barrie	848	871	941	1,141	1,161	1,187	1,331	1,336	1,393	1,472	1,728	1,646
Brantford	677	740	763	900	971	1,050	1,002	1,037	1,102	1,070	1,115	1,178
Centre Wellington	F	F	F	852	921	920	1,047	1,182	1,128	1,183	F	F
Chatham-Kent	579	575	613	705	736	767	809	875	886	766	862	846
Collingwood	F	749	993	918	995	1,003	1,082	1,156	1,192	F	F	F
Essex	F	F	F	F	F	F	769	863	818	F	F	F
Guelph	775	819	871	1,034	1,145	1,212	1,157	1,282	1,356	1,264	1,368	1,383
Haldimand	F	F	F	778	759	748	781	793	775	F	F	F
Hamilton	806	826	898	970	1,020	1,096	1,158	1,219	1,291	1,373	1,450	1,511
Ingersoll	F	F	F	816	770	F	848	896	F	F	F	F
Kincardine, Ontario	F	F	F	861	944	904	988	1,026	1,042	F	F	F
Kingston, Ontario	745	814	871	1,008	1,101	1,145	1,200	1,289	1,327	1,998	1,805	1,828
Kitchener-Cambridge-	796	810	863	1,021	1,045	1,076	1,210	1,231	1,295	1,254	1,300	1,435
Leamington	F	F	F	770	929	923	910	1,168	1,164	1,165	1,101	1,212
London	669	697	774	877	915	1,001	1,087	1,107	1,207	1,240	1,322	1,379
Meaford	F	F	F	689	728	724	901	896	957	F	F	F
Midland	613	F	604	860	908	929	1,013	1,066	1,074	1,045	1,117	1,046
Norfolk	565	596	F	736	737	765	733	781	779	912	F	F
North Perth	619	664	697	723	764	788	821	868	904	972	1,036	1,114
Owen Sound	644	661	673	786	830	860	926	949	1,008	1,000	1,036	1,088
Sarnia	689	747	786	840	880	945	1,017	994	1,151	1,372	1,413	1,378
Saugeen Shores	F	F	F	735	777	737	921	1,063	1,148	1,053	1,116	1,195
Stratford	622	608	731	787	812	899	946	991	1,079	1,097	1,139	1,204
Tillsonburg	652	676	678	750	828	846	877	965	992	939	F	F
Toronto	1,080	1,141	1,204	1,261	1,361	1,421	1,467	1,562	1,635	1,633	1,732	1,848
West Grey	F	F	F	632	656	F	706	758	F	F	F	F
Windsor	600	683	699	772	831	896	915	949	1,027	1,090	1,130	1,214
Woodstock	747	676	687	830	1,092	1,147	1,011	1,337	1,417	945	1,038	1,116
Symbol Legend												
..												
source:												
Statistics Canada. Table 34-10-0133-01 Canada Mortgage and Housing Corporation, average rents for areas with a population of 10,000 and over												
https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3410013301												

The limited supply of rental housing was a common theme in the Community Workshops conducted through this study. CMHC reports shows that the supply of rental condominium and private apartments is limited across Ontario. Vacancy rates for condominium rentals are well below 1% on average in southwestern Ontario.

The occupancy rates in southwestern Ontario are similar to eastern Ontario while more product is available within the Greater Toronto Area. Table 14 shows the limited data available on vacancy rates in southwestern Ontario. Urban areas on average have much higher occupancy rates than the rural communities that make up the WOWC.

Table 14: Apartment vacancy rates, select WOWC communities October 2020

Jurisdiction	Vacancy Rate (%)
Barrie	2.1
Brantford	2.2
Centre Wellington	0
Chatham-Kent	1.3
Collingwood	3.5
Essex T	0
Guelph	2.2
Haldimand County CY	0
Hamilton	3.5
Ingersoll	**
Kincardine MU	**
Kingston	3.2
Kitchener - Cambridge - Waterloo	2.1
Lambton Shores MU	**
Leamington	1
London	3.4
Meaford MU	0
Midland	1.7
Norfolk	2.4
North Perth MU	5.3
Owen Sound	1.8
Sarnia	4.6
Saugeen Shores T	0.5
South Huron MU	**
Stratford	1.5
Tillsonburg	2.1
Toronto	3.4
West Grey MU	**
Windsor	3.6
Woodstock	1.2
Ontario	3.2

** indicates data is suppressed
Source: CMHC Rental Market Survey October 2020 https://www.cmhc-schl.gc.ca/en/professionals/housing-markets-data-and-research/housing-data/data-tables/rental-market/rental-market-report-data-tables

As shown in Table 15, the share of condos in the rental market ranges from 22% to 33.9%. This shows a strong demand for additional rental housing, which could be achieved, in part through condo rentals. When considered relative to the average purchase price of homes at over $500,000, expanding the rental market appears to be a strong opportunity area for workforce housing, particularly in the lower age and income range.

Table 15: Rental condominium vacancy rates, average rents and percentage in rentals, select Ontario CMAs

Rental Condominium Apartments and Private Apartments in the RMS, Vacancy Rates (%), Average Rents ($) and Percentage of Condominium Apartments in Rentals
October 2020

	Vacancy Rates (%)				Average Rent Two Bedroom ($)				Universe					
Centre	Rental Condo Apts		Apts in the RMS		Rental Condo Apts		Apts in the RMS		Rental Condo Apts		Apts in the RMS		Percentage of Condo Apts in Rental	
Hamilton CMA	0.3	a	3.5	a	1,947	c	1,291	a	3,869	a	44,258	a	22.4	a
Kitchener-Cambridge-Waterloo CMA	1.2	a	2.1	a	1,418	c	1,295	a	3,902	a	36,305	a	31.6	a
London CMA	0.6	b	3.4	a	1,619	d	1,207	a	2,618	a	46,326	a	33.9	a
Ottawa-Gatineau CMA (Ont. part)	0.4	a	3.9	b	1,752	c	1,517	a	10,689	a	66,084	a	29.8	a
Toronto CMA	1.9	a	3.4	a	2,440	a	1,635	a	144,863	a	318,613	a	34.3	a
Total	**1.9**	**a**	**3.3**	**a**	**1,663**	**a**	**1,193**	**a**	**363,519**	**a**	**1,639,736**	**a**	**29.7**	**a**

Quality Indicators:
a – Excellent b – Very Good c – Good d – Poor (Use with Caution)
** – Data Suppressed
++ – Change in rent is not statistically significant. This means that the change in rent is not statistically different than zero (0).
N/A – Data not available
- – No units exist in the universe for this category

Source: Rental Market Survey (CMHC)

Source: CMHC Rental Market Survey October 2020 https://www.cmhc-schl.gc.ca/en/professionals/housing-markets-data-and-research/housing-data/data-tables/rental-market/rental-market-report-data-tables

This research on housing costs clearly indicates increasing housing costs and low rental vacancy rates. The increase in the cost of home ownership is a limiting factor for the workforce, particularly for newcomers and those just entering the workforce. The rental market is tight and indicates a real limit in smaller communities, especially for those in temporary or seasonal positions. The application of housing policy and building format strategy can support the gap that is evident in the cost of housing overall.

7.6 Planning & Policy Tools for Attainable Housing

Community Engagement

Engaging with communities early and through county level policy sets an important strategy and education program to support understanding need and the options clearly. Community support and approval are often two of the biggest hurdles to integrate and achieve housing affordability. While many communities may acknowledge the need to address affordability issues and adopt housing goals and strategies, community opposition and resistance to change can block sound housing policy and development from moving forward. Planning must no longer be a tool for those who only want to avoid change. Instead, planning can, and should, be an instrument to build equitable communities for all.[23]

County leadership, specifically through planning and economic development departments, can play a key role in countering opposition to housing options. Building public support for housing affordability means engaging the community early and often and listening to and addressing community values and concerns. An outreach strategy can guide planners toward engaging the public and key stakeholders in conversations about housing need, demand, and trends, as well as the consequences of inaction.

Proactive engagement including more modern tools, such as visualization, would support alignment with community goals and implementation. Listening sessions can lead to greater agreement on community priorities and create an impetus for change. Other methods of outreach and opportunities for engagement should be inclusive and responsive to a broad range of constituents. Policies and practice should incorporate early public engagement and establish a common framework for delivering the projects envisioned in plans. Model bylaws can be incorporated into the policy tools to support engagement and implementation

Case Study: Yes! In my Backyard

City of Guelph and Wellington County, ON

Community Support Outreach Description	
Community engagement refers to addressing community opposition and resistance to change in an existing or planned neighbourhood, often in the form of housing, through education and outreach tools.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Understand community support for and/or opposition to new housing typologies and options in the study area municipality.	• Prioritize education for local housing strategy with proactive tools such as visualization.

[23] American Planning Association. (2021). Turning NIMBY Into YIMBY.

The Yes! In my Backyard Guelph-Wellington campaign was launched by the Guelph and Wellington Task Force for Poverty Elimination in December 2020 to encourage community members to show their support for affordable housing projects. This campaign is in direct response to neighbourhood opposition to housing developments based on stereotypes, stigma, and prejudice. The goal of the project is a total shift in community thinking and unanimous support from Council.

Partnerships

Attainable housing, in Ontario in particular, requires strong partnerships between all levels of government, non-profit and cooperative housing providers, and the individuals who require housing support. Seed and ongoing capital to invest in affordable housing is critical, especially for projects not funded exclusively through private development.

While currently there is increased interest from senior levels of government to provide funding for housing, this interest can vacillate over time meaning that organizations must be self-sustaining. Good workforce housing models depend on effective partnerships at their core to support projects through to their completion and long-term success.

Housing organizations that fund housing reinvestment activities through income from rentals or shared-equity appreciation models have been around for some time now. These models have proved to be effective for managing the housing organization’s activities.

Case Study: Investing in Affordable Housing

City of Sarnia, Lambton County, and CMHC, Sarnia, ON

Funding Collaboration Description	
Good workforce housing models depend on effective partnerships at their core to support projects through to their completion and long-term success.	
Direction for the Housing Review	
Opportunity	**Implementation Strategy**
• Several best practice and ongoing examples of partnership to provide attainable housing in the study area. • Existing and planned investment for new housing units.	• Invest in and foster relationships across levels of government and with private sector partners. • Leverage federal funding available to support housing development.

In March 2021, Canada Mortgage and Housing Corporation (CMHC) announced $1.3 million in funding to create affordable rental units for seniors in the City of Sarnia.[24] The new development, located at 993 Maxwell Street and operated by the County of Lambton, will provide 24 one-bedroom apartments for seniors of which six will be fully accessible. The three-storey addition will be modular

[24] CMHC. (05 Mar 2021). Investing in Affordable Housing in Sarnia.

in design and assembled using prefabricated units. It will include barrier free access throughout, an elevator, and energy efficiency features.

Funding for this project is being delivered through the Canada-Ontario Community Housing Initiative, a joint initiative by federal and provincial governments.

Community Improvement Plans (CIP)

A Community Improvement Plan (CIP) is a planning tool used by municipalities to revitalize areas of a community through programs, grants, and incentives. Section 28 of the Planning Act gives municipalities that have enabling policies in their Official Plans, the ability to prepare CIPs. The provision of affordable, purpose-built housing supply could be integrated into CIPs. Through CIPs, municipalities can focus public attention on local priorities and municipal initiatives, target areas in need of repair, rehabilitation, and redevelopment, facilitate community change in a coordinated fashion, and incentivize private sector investment through municipal initiatives.

Case Study: Affordable Rental Housing Community Improvement Plan (CIP)

City of Belleville, ON

Community Engagement Description	
Financial incentives through a CIP support reduced project costs to increase the supply of affordable rental units, revitalize areas and support brownfield redevelopment for housing.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Review CIP options for increased housing supply.	• Prioritize CIP projects for housing.

The City of Belleville Community Improvement Plan encourages responsible and sustainable growth through support for development and redevelopment.[25]

The CIP includes 17 programs which provide financial incentives for development, redevelopment, and remediation projects. These projects must meet eligibility criteria designed to support projects which work towards achieving the intent and goals of the CIP.

The CIP is intended to reduce the costs of projects which:

- Increase the supply of affordable rental units city-wide.
- Increase the supply of rental units downtown.
- Revitalize the downtown building stock.
- Remediate and redevelop brownfield sites.

[25] City of Belleville. (Dec 2020). Community Improvement Plan.

Community Benefit Charges (CBC)

Community Benefit Charges (CBC) are a new planning tool which has recently replaced Density Bonusing as per section 37 of the Planning Act. Bill 197: The COVID-19 Economic Recovery Act, 2020 repealed and replaced Section 37 of the Planning Act which allowed municipalities to accept cash in exchange for increases in height and density. According to the newly enacted section, municipalities can impose, by bylaw, Community Benefit Charges (CBC).

CBC is a financial contribution that is required to be paid when land is developed to contribute to the "capital costs of facilities, services and matters" incurred from development and population growth. Unlike Density Bonusing, CBCs are no longer restricted to zoning and minor variance applications proposing height and/or density beyond the existing zoning requirements.

The new CBC regime under section 37 is permissive, not mandatory. As such, municipalities can choose whether or not to avail themselves of a CBC By-law and are permitted to continue enacting by-laws under the old Section 37: Density Bonusing until September 18, 2022 or the date the municipality enacts a CBC by-law.

Community Benefits Description	
Community Benefit Charges allow municipalities to implement a by-law that requires a financial contribution when land is developed to contribute to the capital costs of facilities, services, and matters incurred from development and population growth.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Implement CBC regime as opposed to Density Bonusing.	• Understand the impact of CBC on the feasibility of development, and its potential to support attainable housing in the municipality.

Development Charges

Development charges are fees collected from developers at the time a building permit is issued to help pay for the cost of infrastructure required to provide municipal services such as roads, transit, water and sewer infrastructure, community centres and fire and police facilities to new development,

Notably, municipalities may not levy both a development charge and a CBC for the same service. Once a municipality has included a matter in its development charge by-law, a CBC cannot collect for the same matter. Should municipalities choose to not use CBCs, they will be able to rely on development charges and parkland dedication to support new development.[26]

[26] McLarty, J., Piurko, T., & Tang, D. (6 Oct 2020). New community benefits charge framework in effect. Miller Thomson.

Several municipalities in the study area have or are in the process of implementing development charges to assist in financing capital projects required to meet the increased need for servicing resulting from growth and development.

Development Charges Description	
Development charges are fees collected from developers at the time a building permit is issued to help pay for the cost of infrastructure required to provide municipal services to new development.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Several municipalities are already exploring the feasibility of and implementation process for development charges.	• Identify potential opportunities for development charges to support growth and development in the municipality.

Inclusionary Zoning/Housing

Inclusionary Zoning (IZ) is a land use planning policy tool that enables municipalities to secure affordable housing in new development. Within the context of Ontario, this tool intends to increase the supply of affordable housing for low- and moderate-income households, particularly in transit-connected locations[27].

In 2018, the province of Ontario enacted legislation that allows municipalities to introduce planning requirements for the inclusion of affordable housing in new residential developments. Municipalities are required to prepare an assessment report outlining the housing requirements, what needs to be done in Official Plan policies with respect to IZ, and how IZ can help address housing demand issues in a municipality. Once implemented, zoning regulations require an applicant to contribute to below market cost housing units (directly through building or through funding) as part of a rezoning for development.

IZ has been adopted and applied in several jurisdictions to address housing affordability across the U.S. A survey of IZ implementation in the U.S. reveals that there are a variety of approaches around two primary features:[28]

- Mandated programs that require all development over a certain size to include a percentage of affordable housing and include a specific offset or compensation.
- Voluntary programs that establish a schedule of incentives which developers may elect to negotiate in exchange for inclusion of some negotiable level of affordable dwellings.

[27] Kelling, M., Afshar, Y., & Heath, A. (5 Nov 2020). *The Latest on Inclusionary Zoning.* Urban Strategies.
[28] Gladki, J., & Pomeroy, S. (2007). Implementing Inclusionary Zoning Policy to Facilitate Affordable Housing Development in Ontario.

Case Study: Inclusionary Zoning Framework

City of Toronto, ON

Inclusionary Zoning Description	
Inclusionary Zoning is a land use planning policy tool that enables municipalities to secure affordable housing in new developments. In Ontario, it is typically used to increase the supply of affordable housing for low- and moderate-income households, particularly in transit-connected locations.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Opportunity for municipalities with urban centres to explore inclusionary zoning in transit-connected locations to support attainable housing options.	• Co-located attainable housing with accessible transit options. • Consider inclusionary zoning for the purposes of building attainable housing near to transit locations.

The City of Toronto's inclusionary zoning framework consists of two planning instruments.

- A draft Official Plan amendment, which amends Section 3.2.1 "Housing and Section 5.1 "Managing Growth and Change: The Planning Tool Box" of the City's Official Plan. This amendment outlines and authorizes the implementing inclusionary zoning by-laws.
- The draft implementing zoning by-law amendment makes amendments to the City's Zoning By-law NO. 569-2013. This amendment adds the details of the City's framework as enforceable zoning regulations.

Key components of this framework include:[29]

- Geographic Application – IZ will only be required in Protected Major Transit Station Areas (PMTSA) within strong or moderate market areas, as determined by the city through an assessment report. The framework would also allow for IZ requirements to be met by the provision of affordable housing on an alternative site. The flexibility recognizes that there may be circumstances where affordable housing can be better accommodated on another site.
- Affordability – Units will remain affordable for 99 years from the first occupancy. Rents are determined annually, based on CMHC data for the city.

[29] Costello, E.P.K, & Pappas, J. (13 Jan 2021). Inclusionary Zoning – What Does It Mean for My Development Project? Aird & Berlis LLP.

- Units – The number of affordable units will be equal to the number of market units. The city has determined percentage values for ownership and rental units based on moderate and strong market areas.

Loan Programs

Loan programs are used by all levels of government to incent the construction and/or purchase of attainable housing typologies. For example, the federal government has implemented the Rental Construction Financing Incentive, which distributes low-cost loans to encourage the construction of sustainable rental apartment projects.[30]

Case Study: Affordable Home Ownership Loan Program

Peel Region, ON

Peel Region Loan Program Description
Loan programs are used by all levels of government to incent the construction and/or purchase of attainable housing typologies. The Region of Peel has developed a My Home Second Unit Renovation Program, which provides homeowners with a forgivable loan to upgrade and legalize their existing second unit and rent to a tenant referred by the Region of Peel. Municipalities may choose to develop localized loan programs to support low to moderate income households with the purchase of a home

Direction for the Housing Review	
Opportunity	Implementation Strategy
• Integrate safe and legal secondary units into existing building stock, encouraging and promoting infill development.	• Establish expectations for regional and local municipalities if providing financial assistance to homeowners. • Integrate second unit renovation program with tenant placement and/or matching program. • Determine eligibility requirements for the program (e.g., existing unit must have kitchen, washroom, and separate sleeping area, gross household income, etc.) • Establish rent rates that do not exceed an affordable rate in accordance with CMHC market for 10 years. • Consider mandatory orientation sessions that includes information on Residential Tenancies Act, Ontario’s Human Rights System, and other important requirements for landlords.

30 Canadian Mortgage and Housing Corporation. (2021). Rental Construction Financing Initiative.

The Region of Peel has developed a My Home Second Unit Renovation Program, which provides forgivable loans to upgrade and legalize existing second unit and rent to a tenant referred by the Region of Peel.[31] Municipalities may choose to develop localized loan programs to support low to moderate income households with the purchase of a home.

Case Study: Affordable Homeownership Loan Program

City of Stratford, ON

Loan Programs Description	
Loan programs are a tool used by all levels of government to incent the construction and/or purchase of attainable housing typologies.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Develop loan programs applied in other study area municipalities (e.g., City of Stratford), or in partnership with private sector companies to support attainable home ownership.	• Consider local financing program to support low to moderate income households entering the home ownership market. • Establish eligibility criteria to ensure that targeted groups experiencing barriers to homeownership are prioritized through a loan program.

The City of Stratford re-launched its Affordable Homeownership Loan Program in 2020. The program provides qualified low to moderate income households with down payment assistance loans of up to 5% off the purchase price of a home.[32]

The City has established a list of eligibility criteria for the 2021 course of the program, which includes but is not limited to:

- Maximum household income limit of $90,700 if applying as a couple or family, and $74,600 if applying as an individual.
- Maximum purchase price of an eligible residential property is $437,662.
- Individuals must either be a Canadian Citizen, Landed Immigrant/ Permanent Resident (or made an application), Refugee or Refugee Claimant.

Applicants are required to submit an application to the City, and qualification is determined on an as-submitted basis. Qualification for the program does not guarantee that the applicant will receive funding, and preference is given chronologically to applications that are complete and eligible.

31 Region of Peel. (2021). My Home Second Unit Renovation Program.
32 City of Stratford. (2021). Housing: Affordable Homeownership Loan Program.

Land Banking

Land Banking Description	
Land banks are region-specific public entities created by local governments or governmental entities such as housing authorities. Land banking is a creative approach that could help address housing supply issues by either managing or disposing of vacant lands and vacant or tax-delinquent properties.	
Direction for the Housing Review	
Opportunity	Implementation Strategy
• Opportunity to support attainable housing on public lands in partnership with public and/or private entities.	• Consider land banking as an option for housing development on public lands.

Land banking addresses housing supply issues by either managing or disposing of vacant lands and vacant or tax-delinquent properties. Land banks are region-specific public entities created by local governments or governmental entities such as housing authorities. Once funded, land banks have the authority to dissolve any delinquent taxes and convey properties free from loans, including prior mortgages, through a tax foreclosure process.

Land banking can help reserve limited land resources for future use for affordable housing or projects supporting the construction of such housing supplies. Many land banking entities choose to sell their property stocks to investors or developers that offer a positive redevelopment project in communities. These entities prefer to sell their lands or properties to non-for-profit developers aiming to develop affordable housing for low-moderate income households rather than sell to developers aiming to develop large commercial projects.

Streamlined Permitting

The process for obtaining development permits is a time and money-consuming process in many cities and small towns. A primary reason for these extensive delays is the excessive and sometimes conflicting requirements for obtaining permits for variances and special uses.

A practical way to tackle this issue is a comprehensive review of all permitting requirements in cities, towns, and counties. The process is intended to identify, assess and possibly remove factors suppressing new residential construction and redevelopment by expediting the development process.

Although streamlining the permitting process might not yield immediate results to housing supply in struggling towns and cities, it attract a wide range of for-profit and not-for profit housing developers, and help increase the supply of housing over the long term.

Case Study: Attainable Housing Strategy

Wellington County, ON

<table>
<tr><th colspan="2">Streamlined Permitting Description</th></tr>
<tr><td colspan="2">Streamlined permitting processes can help to increase the supply of attainable housing over the long term by reducing the time required to process development applications.</td></tr>
<tr><th colspan="2">Direction for the Housing Review</th></tr>
<tr><th>Opportunity</th><th>Implementation Strategy</th></tr>
<tr><td>Slow and onerous development approval processes are identified as a key barrier to development by developers.</td><td>Understand and identify barriers in the local approvals process.
Understand developer needs with respect to streamlining approvals.
Streamline approvals to expedite the timeframe required for housing development.</td></tr>
</table>

Attainable housing is a priority for the County and its member municipalities. The purpose of the Attainable Housing Strategy (the Strategy) provides recommendations to assist the County with its attainable housing shortage. This document recognizes that the scale of this issue is significant, particularly for the County's workforce.

The Strategy recognizes that the lack of attainable housing is linked to workforce attraction, among other interrelated factors (e.g., geographic location). The Strategy broadly establishes strategies appropriate for all low and moderate-income households. One of several recommendations in the Strategy includes streamlining of the planning approvals process. The Strategy identifies a streamlined process may include implementing a Development Permit System to facilitate streamlined development.

Community Land Trust (CLT)

<table>
<tr><th colspan="2">Community Land Trusts Description</th></tr>
<tr><td colspan="2">Community Land Trusts (CLTs) are entities that obtain and hold land and housing stock for the long-term benefits of communities.</td></tr>
<tr><th colspan="2">Direction for the Housing Review</th></tr>
<tr><th>Opportunity</th><th>Implementation Strategy</th></tr>
<tr><td>Existing CLTs are underway in the study area.
Opportunity to integrate other housing models, including co-living spaces.
Opportunity to empower community members via land control.</td><td>Explore and identify land suitable for CLTs.
Explore partnership opportunities with new/ existing CLTs.</td></tr>
</table>

Community Land Trusts (CLTs) are non-profit corporations that obtain and hold land and housing stock for the long-term benefits of communities. CLTs remove housing or land resources from the real estate market and keep these resources in a trust for an indeterminate time to preserve the affordability of the land and housing assets.

Affordability is. Maintained through a dual ownership regime, whereby the ownership of a property is separated from the ownership of the land on which that property is built. Under this model, CLTs retain ownership of land and lease the properties on that land to individuals or non-profit organizations for a long period of time.

CLTs are similar to Land Banks in that they both remove properties from the speculative market cycle but they differ in an essential way. Land Banks are responsible for returning vacant, tax foreclosed, and abandoned properties to productive cycle by selling the properties to potential developers while CLTs enable community control over land and create a permanently affordable housing stock in a municipality.

7.7 Business Plan Approach

Establish Expectations for Housing Implementation

Establishing the business plan for each County requires alignment of the need and actions that can support expedited implementation. Implementation success requires a collaborative and combined approach with various tools focused on the local needs. Two top priorities in business planning across the region include:

1. Housing Need - Evaluating the case for housing relative to the local persona profile needs
2. Developer Attraction - Addressing the business case gap for developers and reducing the risk to move into building new products and work in new municipalities where they have not previously done business

Defining Housing Need

Table 16 provides a summary of the housing typologies and tools by growth rates, industry types and personas as a guideline for individual County housing strategies.

Table 16: Housing Implementation Considerations

Growth	Primary Industry	Primary Persona(s)	Housing Implementation	
			Typologies	Tools
0-10%	• Manufacturing • Agriculture	 Age 55+  Temp & Seasonal	• Single- and multi-family home ownership options • Additional residential units on existing/new private property • Age-friendly options	• Zoning by-law amendments • Community Land Trusts
11-29%	• Manufacturing • Utilities • Agriculture	 Newcomers  Temp & Seasonal	• Co-living purpose-built rental units • Standard, private purpose-built rental units • Additional residential units on new/ existing private property • Homeownership options across typologies • Age-friendly options	• Community engagement • Zoning by-law amendments • Community Improvement Plans • Community Benefits Charges • Development Charges
30% +	• Professional Services • Health Care	 Entry-level  Newcomers  Families	• Co-living purpose-built rental units • Standard, private purpose-built rental units • Homeownership options across typologies • Age-friendly options	• Community engagement • Community Improvement Plans • Community Benefits Charges • Development Charges • Inclusionary Zoning

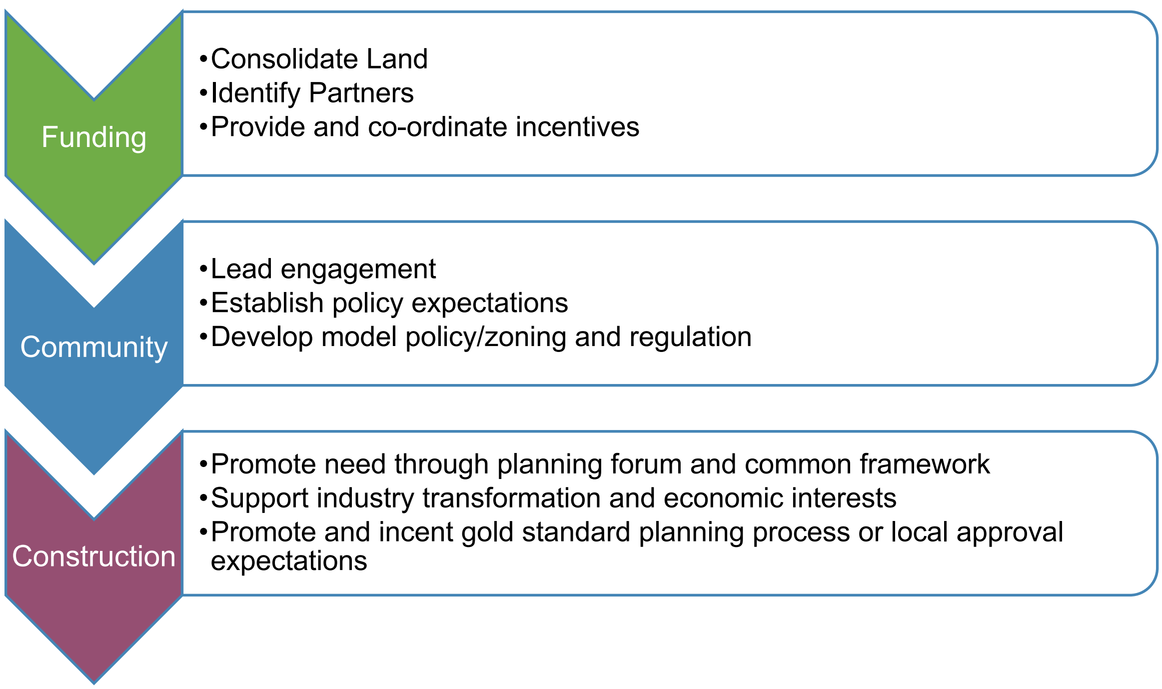
County Role in Housing

The research and consultation completed during this project has shown that an extended and more circular approach to housing is an imperative within the region. County based action is required to support these housing considerations.

Within the region, counties need to encourage public interest in housing as a priority for community growth planning. Access to services, in particular transportation strategies, are essential. The development industry also needs the ability to measure predictability in the planning process outcomes and see expedited opportunities. The role of the County in business planning needs to address the priorities identified for the housing component of the workforce strategy.

The following process flow shows the key actions for County level direction to support housing. It outlines the critical actions that can support local engagement and progress.

Figure 27: County Actions Process



Further to engaging in the actions outlined in the process flow, Table 17 outlines the specific business plan components that are required to provide additional housing supply and types. These actions may be done in coordination with the Counties and/or local municipalities. Business planning needs to include these defined components to establish a program that can measure success and expedite the housing needed.

Table 17: Business Plan Process

Leadership	• Becoming a champion for housing through policy and advocacy
Addressing Funding	• Partnering with the private sector can advance a more flexible range of housing initiatives to maximize need for specific sectors/groups • Collaborating on accessing funding from governments provides anticipated financial opportunity for public planned housing projects • Land banking supports partnerships and available supply that is locationally strategic
Implementing Policy	• Flexible policy and communications planning at a county level supports education for communities and acceptability for alternate housing, also providing confidence for industry • Engaging with businesses and schools supports matching programs to link workforce need and investment in housing opportunity.
Engaging with Community and Industry	• Providing approvals predictability through defined processes for housing models helps provide confidence for developers on the uncertainty that they cannot measure through the process for time and schedule. • Establishing economic development strategy for dominant housing solutions in local areas supports planning trades and local economic industry to support housing production (ie. Prefabricated solutions)
Monitoring Performance	• Establishing metrics and tracking data on implementation

POPULATION AND WORKFORCE GROWTH

Projecting future workforce supply

8 Population and Workforce Growth

8.1 Why it matters

The purpose of this regional workforce strategy is to ensure the WOWC region has a strong talent pipeline to meet workforce over the next 10 to 20 years. Because of a significant shift in demographics over the past 20 years, the region is now facing a large wave of retirements in the coming years relative the number of local young people joining the workforce. If the workforce is to continue growing as in the past, it will require new sources of workers. This new talent can come from outside the WOWC region (such as migrants from elsewhere in Canada or immigrants) or from inside the region (e.g. older people putting off retirement, including under-represented groups in the labour market, etc.).

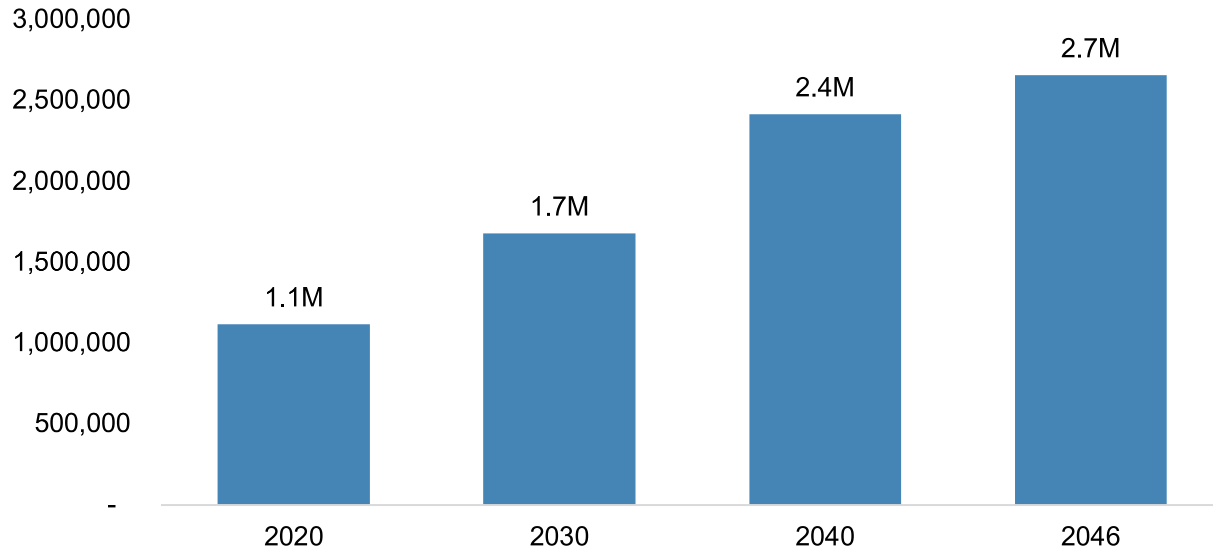
An important strategic question is: why does it matter? Population growth in recent years has put upward pressure on housing and other infrastructure in the WOWC region. It has led to increased congestion on many of the region's highways. Why not let population growth moderate or even encourage population decline in the coming years? There are several important reasons why the WOWC region should continue to encourage moderate population and workforce growth over the next two decades.

To support provincial fiscal sustainability

The Ontario and Canadian economic growth targets are based on moderate population and workforce growth over the next two decades to address the changing demographics in Ontario and across the country. The population aged 75 and older in Ontario is expected to rise by 50% between 2020 and 2030, adding another 563,000 to the 75+ population. By 2040, the number in this age cohort will rise by 116% adding another 1.3 million Ontarians aged 75 and older. By 2040, there will be 2.4 million people over the age of 75 living in the province up from only 1.1 million today (Figure 28).

A moderate level of provincial (and national) economic growth over the next two decades will provide a sustainable level of taxation to support a significant increase in health care costs without substantial increases in tax rates.

Figure 28: Projected growth, population aged 75+, Ontario



Sources: Statistics Canada for 2020 and Ontario Ministry of Finance projections (Spring 2021).

To help address future workforce demand across the province

Population growth is even more important now than in the past because a large share of the workforce is heading towards retirement. In 2020, there were 1.7 million people aged 55 and older active in the workforce: over 500,000 more than just 10 years ago and nearly 1.1 million more than at the turn of the century. As these 1.7 million retire over the next 10 to15 years, the province will need to replace them in the workforce (replacement demand) and attract additional workers to meet growth demand. Over the past decade, the Ontario workforce has grown at an average rate of 1.02% per year. To sustain this growth rate over the next 15 years, the province will need to add 1.3 million (net) to the workforce during that period. In total, this means the workforce will need three million new workers over the next 15 years.

To put this into context, over the past 15 years, the replacement demand requirement was an estimated 1.3 million and the growth demand requirement was 960,000 for a total demand of 2.3 million.

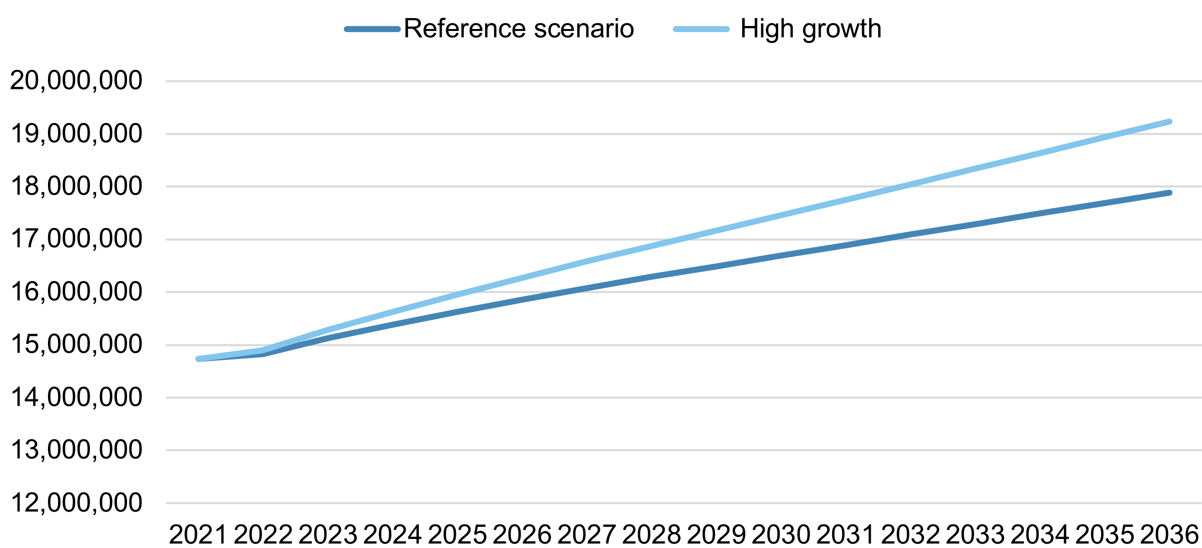
Table 18: Workforce demand profile for Ontario, 2006-2021 and projected 2021-2036

Demand profile	Over the past 15 years 2006-2021	Expected over the next 15 years 2021-2036*
Retirements:	1.3 million	1.7 million
Growth in the workforce:	960,000	1.3 million
Total workforce demand:	2.3 million	3.0 million

*Assumes the average annual workforce growth rate over the past decade will continue into the future.
Sources: Statistics Canada Tables 14-10-0125-01, 14-10-0327-01 and Mellor Murray calculations.

A robust population growth rate will be required to meet the workforce growth and replacement demand. The reference population growth projection scenario published by the Ontario Ministry of Finance is based on an average annual population growth rate of 1.3% per year. This forecast will result in the provincial population growing by 3.2 million over the next 15 years. It is likely the province will need to grow at the high growth scenario to ensure the workforce demand of three million can be addressed. Under the high growth scenario, total population will rise by 4.5 million through 2036 to reach 19.2 million.

Figure 29: Projected annual population growth rates by scenario, Ontario



Sources: Ontario Ministry of Finance projections (Spring 2021).

If the WOWC region doesn't grow at a similar rate it will put even more pressure on the rest of the province to make up for the shortfall.

To ensure the WOWC region continues to offer a high quality of life

Many communities across the WOWC region are experiencing workforce shortages in occupations such as childcare, personal support workers and other health care-related occupations. In addition, many important industries in the region such as manufacturing, and tourism are also starting to struggle with workforce recruitment.

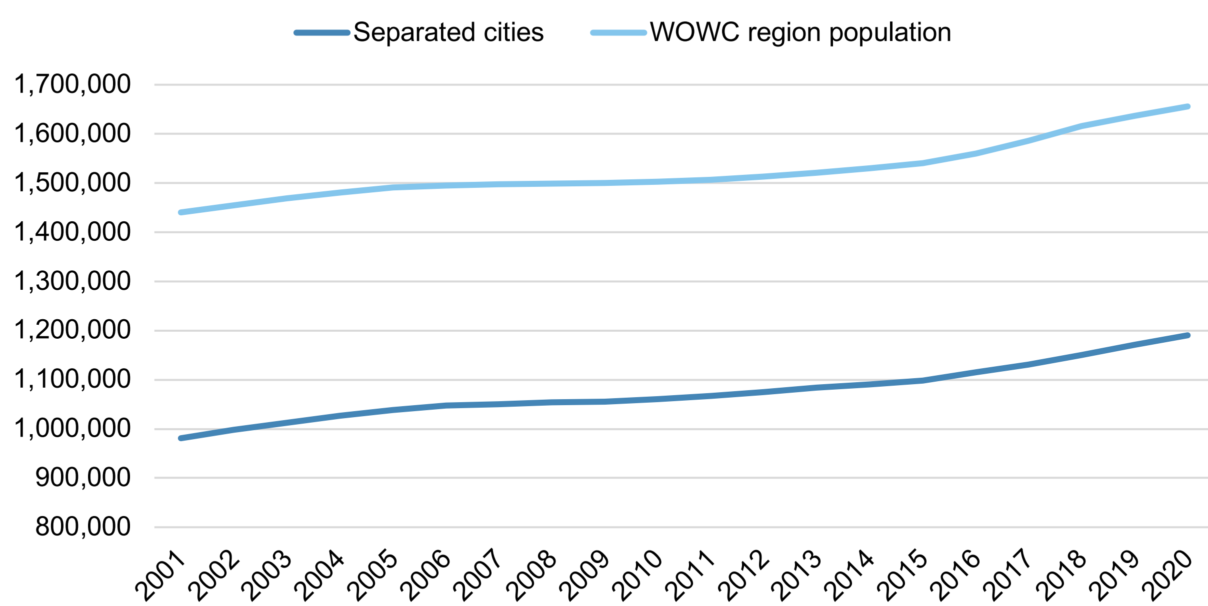
If the communities across the WOWC region cannot address workforce demand in the years ahead, it will certainly impact the region's quality of life. A loss of jobs and investment in key industries such as tourism and manufacturing will ultimately lead to less tax revenue for governments and could impact the quality of public services. An inability for companies to find workers will force residents to commute further and further for access to services; from health care to personal services to retail and entertainment. Chronic workforce shortages will make it more difficult to live in the region, particularly for older residents.

Ultimately the WOWC will be a strong and more sustainable region if it is able to meet its workforce demand. A stagnant or declining population in the years ahead would create a wide range of additional challenges and negatively impact the high quality of life now afforded to residents in the region.

8.2 Recent trends in the WOWC region: A decade of growth

Collectively, the WOWC region has come through a decade of strong economic and population growth. There are some areas within the region that have struggled more than others but overall, since the recession of 2008, the WOWC region has featured a strong economy. As shown in Figure 30, the population started to grow again in 2010 and has been increasing ever since. There are 1.66 million people living in the WOWC region as of 2020. Across the 15 counties, including the separated municipalities, the population is now 2.85 million.

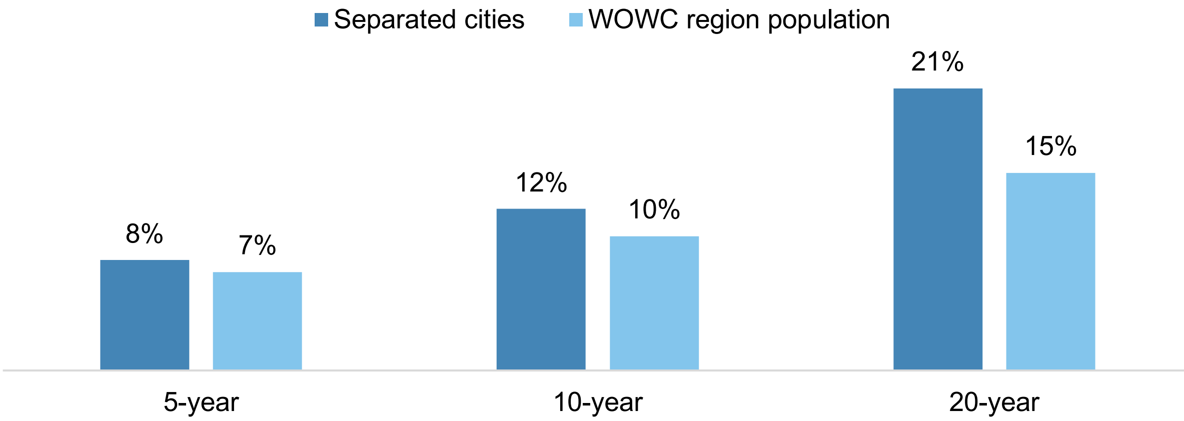
Figure 30: Population growth over the previous 20-year period, WOWC region



Source: Statistics Canada Table: 17-10-0139-01.

Figure 31 shows the population growth rates in the region in five-year increments. In the last five- and ten-year periods, the cumulative growth rates in the WOWC region were similar to that in the larger cities. In the past five years, the WOWC region has witnessed population growth of 7% close to the 8% growth in the separated cities. Over the past ten years, the population growth rate in the WOWC region was 10%.

Figure 31: Population growth rates in five-year increments, WOWC region



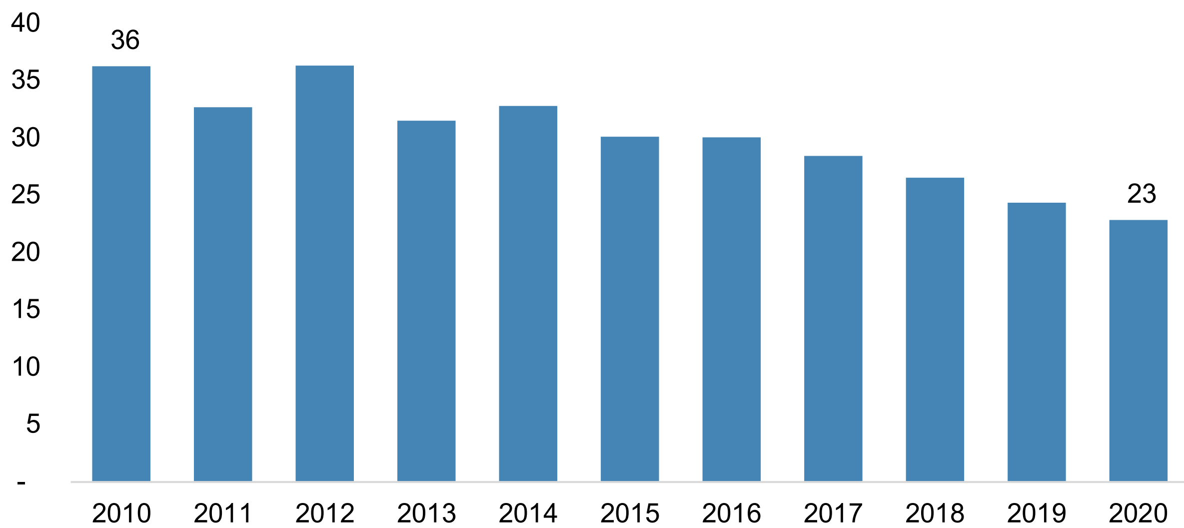
Source: Statistics Canada Table: 17-10-0139-01.

8.3 Sources of population growth

Natural population growth (births minus deaths)

Across the region, natural population growth has declined in recent years. In 2010, for every 1,000 in the population, there were 36 people via natural population growth (births less deaths). By 2020, the natural population growth rate had dropped to only 23 per 1,000. Natural population growth added 9,300 to the WOWC region population in 2010 but by 2030 the annual increase is only 6,500; a decline of 30%. Norfolk, Chatham-Kent, Essex, Lambton, Huron and Grey counties have all experienced negative natural population growth in recent years. As a result, natural population growth was not a major factor in the growth of the regional population in recent years.

Figure 32: Natural population growth rate per 1,000 population, WOWC Region



Source: Statistics Canada Tables: 17-10-0139-01 and 17-10-0142-01.

Net intraprovincial migration

Attracting people from elsewhere in Ontario was the primary source of population growth in the WOWC region for the past 10 years. Intraprovincial migration represented 70% or more of net population growth in 14 of the 15 municipalities. Only Essex County was less reliant on net interprovincial migration to drive population growth. In that area, immigration is the primary source of population growth. As shown in Table 19, Grey, Simcoe, Bruce, Oxford and Norfolk all had high net intraprovincial migration rates in 2019/2020 while Lambton, Middlesex and Chatham-Kent had relatively lower net intraprovincial migration rates.

Net interprovincial migration

Only Essex County, Lambton County and Middlesex County attracted more population from outside Ontario (but within Canada) than was lost through outward migration. None of the counties lost significant population to other provinces. Dufferin County had the lowest net interprovincial migration rate at -24 per 10,000 population and Lambton had the highest at nine per 10,000.

Immigration

Most of the municipalities in the WOWC region have a relatively low immigration rate. Essex and Middlesex stand out but most of the immigrants into those counties settle in the cities (Windsor and London respectively).

Net non-permanent residents

Chatham-Kent, Middlesex and Essex have relatively high non-permanent resident rates. The rest of the region attracts relatively few non-permanent residents.

Table 19: Sources of population growth, rates per 10,000 population (except the natural population growth rate), 2019/2020, WOWC region

Jurisdiction:	Natural population growth (births per 100 deaths)	Net interprovincial migration rate	Net intraprovincial migration rate	Immigrant rate	Net non-permanent residents rate
Dufferin	131	-24	114	18	-4
Wellington (excluding the City of Guelph)	130	-15	70	6	0
Norfolk	76	-15	158	13	0
Brant*	108	-2	112	20	11
Perth*	125	0	101	13	11
Oxford	128	-15	141	14	4
Elgin*	120	-6	123	14	2
Chatham-Kent	78	-2	46	10	32
Essex*	100	5	2	62	49
Lambton	85	9	36	13	18
Middlesex*	116	5	25	57	56
Huron	98	-2	79	9	-16
Bruce	107	-3	124	9	-5
Grey	83	-6	163	7	10
Simcoe (excluding Barrie and Orillia)	115	-15	158	13	0

*includes separated city data.
Source: Statistics Canada.

Table 20 compares each of the counties/jurisdictions to the Ontario level for each population growth component (in 2019/2020). The Ontario rate is set at 1.00. Any number above 1.00 means a higher rate for the population growth component and any number below 1.00 means a lower rate. Where noted the separated city data cannot be extracted from the figures. Net interprovincial migration was excluded from the table.

Only Dufferin, Wellington (excluding Guelph), Perth and Oxford counties have a higher natural population growth rates compared to Ontario overall. Norfolk and Chatham-Kent have very low rates relative to the provincial level at 39% and 37% below the provincial rate respectively.

The net intraprovincial migration rate compares the rates in the WOWC Region against the non-weighted average among the 49 counties across the province. Norfolk, Grey and Simcoe (excluding Barrie and Orillia) all have double the provincial average net intraprovincial migration rate. Wellington (excluding the City of Guelph), Chatham-Kent, Essex, Lambton and Middlesex all have below average net intraprovincial migration rates.

Every municipality in the WOWC Region has a lower immigration rate compared to the province overall. Essex has the top immigration rate in the region, but it was still 28% below the provincial level in 2019/2020. It is important to note that Toronto and Peel have immigration rates more than double the provincial level. In fact, those two counties attracted 63% of the province's immigrants in

2019/2020. Adding in York and Durham and the Greater Toronto region attracted nearly three-fourths of all immigrants to the province.

Finally, Table 20 also compares net non-permanent residents in the WOWC region to the province overall. Essex, Chatham-Kent, and Middlesex County attract more net non-permanent residents than the province overall. The other municipalities/counties attract relatively few non-permanent residents.

Table 20: Index of population growth sources, 2019/2020, WOWC region, Ontario = 1.00

Jurisdiction:	Natural population growth	Net intraprovincial migration rate	Immigrant rate	Net non-permanent residents rate
Dufferin	1.06	1.58	0.21	n/a
Wellington (excluding the City of Guelph)	1.05	0.97	0.07	0.00
Norfolk	0.61	2.19	0.15	0.00
Brant*	0.87	1.55	0.23	0.36
Perth*	1.01	1.41	0.15	0.38
Oxford	1.03	1.97	0.16	0.14
Elgin*	0.97	1.71	0.16	0.07
Chatham-Kent	0.63	0.64	0.12	1.09
Essex*	0.81	0.02	0.72	1.65
Lambton	0.69	0.51	0.16	0.62
Middlesex*	0.93	0.35	0.66	1.89
Huron	0.79	1.10	0.11	n/a
Bruce	0.86	1.72	0.10	n/a
Grey	0.67	2.27	0.08	0.34
Simcoe (excluding Barrie and Orillia)	0.93	2.19	0.15	0.00

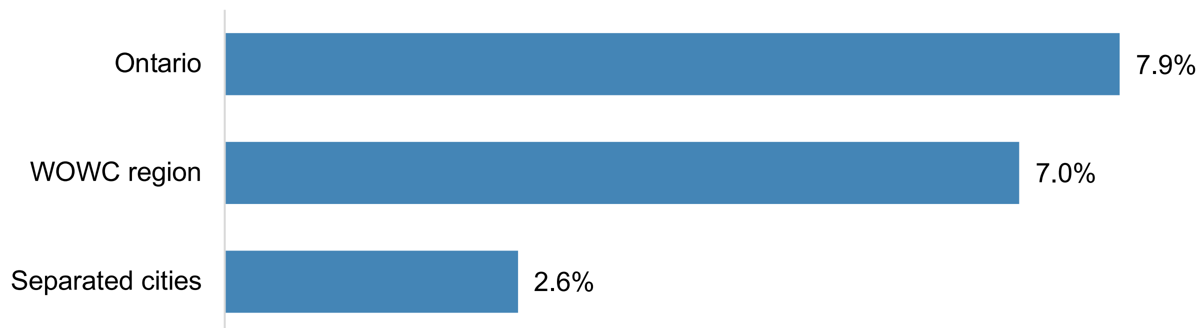
*includes separated city data.
Source: Statistics Canada.

8.4 Economy and workforce

The WOWC region economy has been growing in recent years. According to EMSI, total employment across the region (excluding the separated cities) increased by more than 42,000 between 2010 and 2020, a 7% growth rate even considering the impact of COVID-19 in 2020[33].

WOWC had a slightly slower employment growth rate compared to the province overall (+7.9%) but well above the separated cities employment growth rate of 2.9% (Figure 33). ESMI estimates there were 645,000 people employed in the workforce across the WOWC region in 2020.

Figure 33: Employment growth rate, 2010 to 2020*



*Includes the impact of a decline in employment in 2020 due to the Covid-19 pandemic.
Source: EMSI.

Across the WOWC region, the structure of the economy shifted over the decade. There were considerably more people employed in construction, health care, manufacturing, wholesale trade and professional services in 2020 than in 2010.

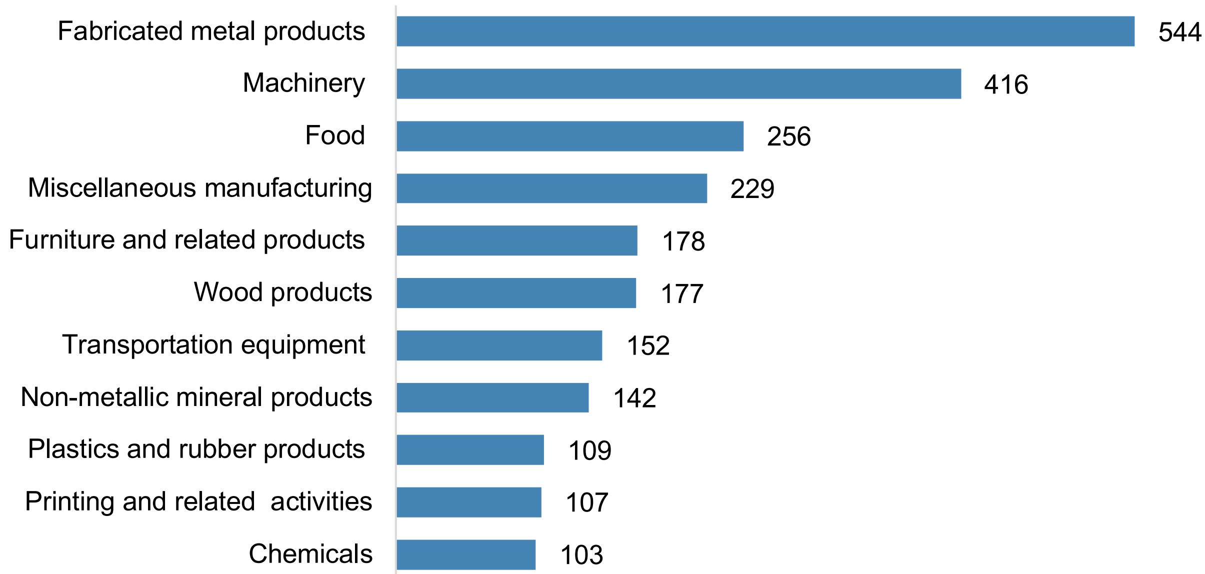
In 2020 there were over 49,000 employer businesses/organizations across the WOWC region (excluding the separated cities). The economy has a higher concentration of firms in agriculture, utilities, construction and manufacturing compared to the country overall. There are nearly 8,000 firms in the construction sector, nearly 5,600 in retail trade and 4,400 in other/personal services.

As discussed earlier, the WOWC region is a manufacturing powerhouse with 40% more manufacturing firms compared to the country overall and nearly twice as much employment in the sector. There are more than 2,700 different manufacturing firms with employees across the region including 544 in fabricated metal product manufacturing, 416 in machinery manufacturing, 178 in furniture and related product manufacturing, 177 in wood products manufacturing and another 256 in food manufacturing (Figure 34).

[33] EMSI's estimates of employment declined in 2020 compared to 2019. It is important to note that many employees that might have been laid off were still with their employers in 2020 due to the Canada Emergency Wage Subsidy (CEWS) and other support programs.
According to Statistics Canada, total employment in 2020 across the three economic regions related to the WOWC region (London, Windsor-Sarnia and Stratford-Bruce) only saw a modest 4.8% decline in total employment between 2019 and 2020.

In 2020 there were an estimated 97,000 people working in the manufacturing sector across the WOWC region making manufacturing the largest employment sector by a wide margin (health care was next with 70,000 workers).

Figure 34: Number of manufacturers by selected sub-sector, WOWC region (2020)*



*with employment. Source: Statistics Canada location counts, June 2020.

Other than manufacturing and health care, other top employment sectors include retail trade (68,000), construction (64,000), agriculture/forestry (43,000) and accommodations and food services (35,000).

Location Quotient analysis compares the concentration of employment in the subject jurisdiction (in this case the WOWC study area) to that of a larger area (in this case Canada). The Location Quotient analysis shows the WOWC region economy has a relatively high concentration of workers in the agriculture, utilities, construction and manufacturing compared to the rest of the country (Table 21).

On a relative basis, the WOWC region has considerably less employment in sectors such as finance and insurance, professional services, education, and public administration. These services tend to be clustered in the larger cities in the region.

Table 21: Firms, employment and growth projections, WOWC Region

NAICS	Firms	Index CAN=1.00	Employ-ment (2020)	% of total	Location Quotient
Unclassified	2,414		8,823	1%	0.96
11 - Agriculture, forestry, fishing and hunting	4,572	2.41	42,634	7%	**3.32**
21 - Mining, quarrying, and oil and gas ext.	130	0.40	2,730	0%	0.39
22 - Utilities	93	1.69	10,839	2%	**2.55**
23 - Construction	7,994	1.40	63,956	10%	**1.39**
31-33 - Manufacturing	2,729	1.39	97,130	15%	**1.85**
41 - Wholesale trade	1,915	0.88	29,000	4%	1.00
44-45 - Retail trade	5,575	1.01	67,862	11%	0.98
48-49 - Transportation and warehousing	2,555	0.93	29,010	4%	0.90
51 - Information and cultural industries	454	0.63	5,985	1%	0.49
52 - Finance and insurance	1,508	0.93	12,601	2%	0.45
53 - Real estate and rental and leasing	1,765	0.81	10,000	2%	0.74
54 - Professional, scientific and tech. services	3,441	0.60	26,456	4%	0.55
55 - Management of companies and enterprises	162	0.63	725	0%	0.19
56 - Administrative and support*	2,096	1.01	32,716	5%	1.00
61 - Educational services	396	0.68	30,257	5%	0.64
62 - Health care and social assistance	3,608	0.76	69,990	11%	0.88
71 - Arts, entertainment and recreation	719	0.98	11,792	2%	1.05
72 - Accommodation and food services	2,743	0.85	34,888	5%	0.96
81 - Other services (except public admin)	4,372	1.01	30,649	5%	**1.10**
91 - Public administration	161	0.52	26,874	4%	0.65
Totals	49,402		644,917		

The firm concentration index (CAN = 1.00) compares the relative share of firms in the region relative to the country overall. A number more than 1.00 shows there are more firms in the region, adjusted for size.

The Location Quotient compares the relative share of employment by industry to the country overall. A number more than 1.00 shows a higher reliance on the industry in the region.

Sources: Statistics Canada, EMSI and Mellor Murray Consulting estimates.

8.5 WOWC region workforce demand projections through 2030

Over the next decade, total employment across the WOWC region is expected to rise by over 51,000, a growth rate of 8%. The sectors with the fastest expected growth over this period are:

- Health care
- Construction
- Manufacturing
- Retail trade
- Administrative and support services

Table 22 below summarizes the projected employment growth between 2020 and 2030 as well as the potential retirement and the combined estimated workforce demand over the decade.

Based on the age profile of the workforce, there could be 162,700 people potentially exiting the workforce due to their age, over the next decade. The sectors expecting to lose the most to retirement include retail trade, manufacturing, health care, construction and agriculture.

Combined, workforce demand will be an estimated 213,900 (162,700 from replacement and 51,200 from growth).

On a sector basis, manufacturing is expected to have highest demand with some 29,900 jobs that will need to be filled over the decade. Health care is next with 28,300 followed by construction at 21,300.

These sectors are all strategically important to the economy. If manufacturing jobs cannot be filled it will reduce private sector economic activity in the region and the taxes municipalities need to sustainably fund public services. If health care jobs cannot be filled those jobs could be moved to other jurisdictions forcing longer commutes for local residents. If construction jobs cannot be filled it will exacerbate housing development in the region.

Detailed projections for all 15 WOWC region jurisdictions can be found in the Appendix. Figure 11 provides a summary of the occupations currently in demand in the health care sector.

Table 22: Firms, employment and growth projections, WOWC Region

NAICS	Projected employment (2030)	Net change	% change (2020-2030)	Potential retirements (by 2030)	Est. workforce demand by 2030
Unclassified	9,559	736	8%	1,465	2,202
11 - Agriculture, forestry, fishing and hunting	40,027	-2,607	-6%	13,170	10,563
21 - Mining, quarrying, and oil and gas ext.	3,134	404	15%	707	1,111
22 - Utilities	12,012	1,174	11%	2,525	3,699
23 - Construction	70,321	6,365	10%	14,939	**21,304**
31-33 - Manufacturing	103,134	6,005	6%	23,917	**29,922**
41 - Wholesale trade	31,603	2,604	9%	7,944	10,548
44-45 - Retail trade	72,000	4,138	6%	16,148	20,286
48-49 - Transportation and warehousing	31,652	2,643	9%	9,634	12,277
51 - Information and cultural industries	6,326	341	6%	1,488	1,829
52 - Finance and insurance	14,508	1,907	15%	3,428	5,335
53 - Real estate and rental and leasing	11,134	1,133	11%	3,445	4,578
54 - Professional, scientific and tech. services	29,409	2,953	11%	8,004	10,958
55 - Management of companies	965	240	n/a	266	506
56 - Administrative and support*	35,993	3,277	10%	9,078	12,355
61 - Educational services	32,231	1,974	7%	7,331	9,305
62 - Health care and social assistance	81,197	11,206	16%	17,059	**28,265**
71 - Arts, entertainment and recreation	12,301	509	4%	2,691	3,200
72 - Accommodation and food services	36,938	2,050	6%	4,705	6,756
81 - Other services (except public admin)	33,814	3,165	10%	7,922	11,087
91 - Public administration	27,860	986	4%	6,778	7,764
Totals	696,119	51,202	8%	162,646	213,849

*includes waste management and remediation services.

Potential retirements are Mellor Murry estimates based on the share of workers over the age of 55.
Sources: Statistics Canada, EMSI and Mellor Murray Consulting estimates.

WORKFORCE SUPPLY AND DEMAND

Looking forward

9 Workforce Supply and Demand

9.1 Estimated workforce supply and demand through 2030

No workforce demand projections can ever be completely accurate. They are based on the best information at the time and things will change over the forecast period. They are meant to be seen as a reasonable approximation of the future workforce demand over the next decade to help stakeholders plan engagement with high school students about local career paths; work with the post-secondary education system to ensure it is aligning programming to future workforce demand; target immigration efforts; and develop strategies to engage those not in the workforce today that might join if they had the right training and incentives.

The baseline employment figures for 2020 are EMSI estimates for each jurisdiction in the WOWC region. Statistics Canada does not provide detailed workforce data at the county or municipality level between Census periods and therefore a source such as EMSI is needed to provide the information. The projected employment for 2030 is based on EMSI projections as well, adjusted for an additional two years by Mellor Murray (i.e., the EMSI projections are through 2028 only). EMSI bases its projections on a number of factors including trends in business count and employment data which is updated by Statistics Canada on a bi-annual basis.

The replacement demand was estimated by Mellor Murray using on the share of the workforce in the 2016 Census over the age of 55 and applying that share to the 2020 employment levels, adjusted for provincial level changes in employment by industry since 2016. Statistics Canada does not publish employment by county/industry and age group between Censuses, but the agency does publish employment by age group data at the provincial level by year. The replacement demand figures should be considered 'potential' demand as there are multiple factors that could influence the number over the next decade including more workers staying in the workforce after age 65 and more adults joining the workforce who were not active in 2020.

Mellor Murray considered using 2019 as the base year in the analysis because the data in 2020 includes some COVID-19 impact. However, the difference between 2019 and 2020 EMSI employment estimates was not substantial except for sectors such as accommodations and arts/entertainment/recreation. It was determined 2020 was the best point for the baseline because the COVID-19 pandemic provided a significant shock to the local, national and global economies and a 2019 baseline would not be an accurate depiction of the recovery from the pandemic.

Based on these assumptions, the estimated workforce demand for the 2020 to 2030 timeframe is shown in Table 23.

Across the entire region, over the decade, there will be an estimated 51,200 new jobs from growth demand and nearly 162,700 from (potential) workforce replacement demand meaning the workforce will need an estimated 213,900 new workers over the decade.

Table 23: Estimated workforce demand 2020 to 2030, WOWC region

Jurisdiction:	Employment (2020)	Projected employment (2030)	Growth demand	Replace-ment demand (potential)	Total workforce demand
Dufferin	24,247	26,277	2,030	5,691	7,721
Wellington (excl. the City of Guelph)	46,794	51,480	4,686	11,231	15,917
Haldimand-Norfolk	23,730	24,460	730	6,360	7,090
Brant (excluding Brantford)	17,897	19,594	1,697	4,456	6,154
Perth (excl. Stratford and St. Marys)	19,616	21,265	1,649	5,125	6,774
Oxford	61,940	68,095	6,154	14,585	20,739
Elgin (excluding St. Thomas)	16,012	18,941	2,929	4,059	6,987
Chatham-Kent	46,943	49,586	2,643	12,512	15,154
Essex (excl. City of Windsor/Pelee)	77,171	83,383	6,213	18,192	24,405
Lambton	60,674	64,940	4,266	15,259	19,525
Middlesex (excl. the City of London)	29,810	33,463	3,653	7,288	10,941
Huron	28,150	28,801	651	7,946	8,596
Bruce	32,268	35,115	2,847	8,450	11,297
Grey	43,759	46,422	2,663	12,879	15,542
Simcoe (excl. Barrie and Orillia)	115,907	124,299	8,392	28,615	37,007
WOWC region	**644,917**	**696,119**	**51,202**	**162,646**	**213,849**

Sources: Statistics Canada, EMSI, Mellor Murray estimates.

Another way to illustrate the scale of the workforce demand is to show the future workforce demand relative to the baseline employment in 2020. Across the WOWC region, the workforce will need to add a potential amount equivalent to 34% of the baseline workforce size in 2020. Some jurisdictions will have lower demand relative to the baseline.

Elgin (excluding St. Thomas) is expecting significant growth and replacement demand. Overall, the jurisdiction could need up to an additional 44% of the 2020 baseline workforce. Because of its younger workforce, Essex will need new workers in an amount equivalent to 30% of the 2020 baseline workforce.

Table 24: Estimated workforce demand 2020 to 2030, % of baseline employment, WOWC region

Jurisdiction:	Growth demand	Replace-ment demand (potential)	Total workforce demand
Dufferin	8%	23%	32%
Wellington (excl. the City of Guelph)	10%	24%	34%
Haldimand-Norfolk	3%	27%	30%
Brant (excluding Brantford)	9%	25%	34%
Perth (excl. Stratford and St. Marys)	8%	26%	35%
Oxford	10%	24%	33%
Elgin (excluding St. Thomas)	18%	25%	44%
Chatham-Kent	6%	27%	32%
Essex (excl. City of Windsor/Pelee)	8%	24%	32%
Lambton	7%	25%	32%
Middlesex (excl. the City of London)	12%	24%	37%
Huron	2%	28%	31%
Bruce	9%	26%	35%
Grey	6%	29%	36%
Simcoe (excl. Barrie and Orillia)	7%	25%	32%
WOWC region	8%	25%	33%

Sources: Statistics Canada, EMSI, Mellor Murray estimates.

The same analysis can be completed on a sector-by-sector basis. Again, this data is derived using EMSI employment projections. At a high level it shows the demand from both growth and potential replacement demand. Table 25 shows a summary by two-digit NAICS industry grouping. Primary industry employment (mostly agriculture) is expected to shed 2,600 jobs over the decade but because of the older age of the workforce, will potentially need over 13,000+ workers from replacement demand. In total, there could be over 10,600 jobs needing to be filled in this sector over the decade.

Manufacturing and health care are the two top sectors by projected workforce demand by 2030 across the WOWC region. Manufacturing is expected to be the top driver of private sector jobs in the WOWC region between 2020 and 2030. Between growth and potential replacement demand, there could be an estimated 29,900 jobs needing to be filled in the manufacturing sector across the region. Health care is projected to require more jobs as a result of growth compared to manufacturing with an expected 11,200 over the 10-year period. Adding in replacement demand, there could be over 28,200 jobs in health care that need to be filled by 2030.

Table 25: Estimated workforce demand 2020 to 2030, by sector, WOWC region

NAICS	Growth demand	Replacement demand (potential)	Total workforce demand
Unclassified	736	1,465	2,202
11 - Agriculture, forestry, fishing and hunting	-2,607	13,170	10,563
21 - Mining, quarrying, and oil and gas extraction	404	707	1,111
22 - Utilities	1,174	2,525	3,699
23 - Construction	6,365	14,939	21,304
31-33 - Manufacturing	6,005	23,917	29,922
41 - Wholesale trade	2,604	7,944	10,548
44-45 - Retail trade	4,138	16,148	20,286
48-49 - Transportation and warehousing	2,643	9,634	12,277
51 - Information and cultural industries	341	1,488	1,829
52 - Finance and insurance	1,907	3,428	5,335
53 - Real estate and rental and leasing	1,133	3,445	4,578
54 - Professional, scientific and technical services	2,953	8,004	10,958
55 - Management of companies and enterprises	240	266	506
56 - Administrative and support*	3,277	9,078	12,355
61 - Educational services	1,974	7,331	9,305
62 - Health care and social assistance	11,206	17,059	28,265
71 - Arts, entertainment and recreation	509	2,691	3,200
72 - Accommodation and food services	2,050	4,705	6,756
81 - Other services (except public administration)	3,165	7,922	11,087
91 - Public administration	986	6,778	7,764
Total: WOWC region	**51,202**	**162,646**	**213,849**

*Includes waste management and remediation services.
Sources: Statistics Canada, EMSI, Mellor Murray estimates.

As with the jurisdictional projections above, a good way to show the extent of future workforce demand is to express it relative to the baseline employment numbers for 2020. As shown in Table 21, the sectors with the most projected workforce demand relative to the size of the workforce are real estate, transportation and warehousing, and other/personal services. Management of companies and enterprises has a very high projected workforce demand but in absolute terms it only represents a few hundred jobs across the entire WOWC region.

Relative to the size of the workforce, the accommodations and food services sector has the lowest projected workforce demand mainly because of the young age the workforce. Education, health care and public administration have a relatively young workforce as well but still an estimated one-fifth or more of the workforce in these sectors could potentially retire by 2030.

Table 26: Estimated workforce demand 2020 to 2030, % of baseline employment, by sector, WOWC region

NAICS	Growth demand	Replacement demand (potential)	Total workforce demand
Unclassified	8%	17%	25%
11 - Agriculture, forestry, fishing and hunting	-6%	31%	25%
21 - Mining, quarrying, and oil and gas extraction	15%	26%	41%
22 - Utilities	11%	23%	34%
23 - Construction	10%	23%	33%
31-33 - Manufacturing	6%	25%	31%
41 - Wholesale trade	9%	27%	36%
44-45 - Retail trade	6%	24%	30%
48-49 - Transportation and warehousing	9%	33%	42%
51 - Information and cultural industries	6%	25%	31%
52 - Finance and insurance	15%	27%	42%
53 - Real estate and rental and leasing	11%	34%	46%
54 - Professional, scientific and technical services	11%	30%	41%
55 - Management of companies and enterprises	33%	37%	70%
56 - Administrative and support*	10%	28%	38%
61 - Educational services	7%	24%	31%
62 - Health care and social assistance	16%	24%	40%
71 - Arts, entertainment and recreation	4%	23%	27%
72 - Accommodation and food services	6%	13%	19%
81 - Other services (except public administration)	10%	26%	36%
91 - Public administration	4%	25%	29%
Total: WOWC region	**8%**	**25%**	**33%**

Sources: Statistics Canada, EMSI, Mellor Murray estimates.

9.2 Workforce supply through 2030: The gap before migration estimates

There are only approximately 175,000 residents between the ages of 5 and 14 living in the WOWC region. This is the maximum number of young people currently living in the region that could join the workforce over the next decade. However, the workforce participation rate among those aged 15-24 is only approximately 74% (using Census data). Therefore, based on recent trends, even if none of the 175,000 persons aged 5-14 left the region over the next decade, only about 129,500 will join the workforce through 2030. The gap between the potential demand of 213,900 and the potential local supply of 129,500 will need to be filled by attracting working age population to the region.

Table 27: Workforce supply gap through 2030, WOWC region

Maximum in-region workforce supply (population aged 5-14)	175,000
Adjusted to account for workforce participation levels	129,500
Net maximum in-region workforce supply	129,500
Expected workforce demand (2020-2030)	213,900
Workforce supply 'gap' (through 2030)	84,400

Sources: Statistics Canada, EMSI, Mellor Murray estimates.

9.3 Workforce supply through 2030: Based on population projections

Based on the Ontario Ministry of Finance population projections, the WOWC region should have enough workers to meet demand through 2030. Table 28 shows the estimated increase in the working age population by jurisdiction through 2030 and the projected employment growth rate as developed above. The percentage point difference shows either there is a gap or surplus. It assumes the current workforce participation rate among those aged 15-64 will be the same in 2030 (and that a similar share of the 65+ workforce will remain in the workforce).

Based on this analysis, Dufferin, Wellington, Simcoe, Huron, Norfolk and Oxford will all have enough population in 2030 to meet workforce demand throughout the period. Based on the Ministry of Finance population projections, the other Counties will not meet the projected workforce demand. Elgin, Chatham-Kent and Lambton are facing significant gaps of more than 10 percentage points. It is important to point out that the population growth projections are based on county-level and include the separated cities.

This is an important analysis because it shows the current trajectory based on reliable sources such as the Ontario Ministry of Finance and EMSI. However, for those expecting to have a strong population growth there will be a significant shift in the sources of that growth (as developed below) and the need to ensure there is appropriate housing and other supports.

For those projected to have a workforce gap, it is possible now to develop strategies now to attract more people to the jurisdiction and to look for other ways to boost workforce participation such as increasing the share of older workers and under-represented groups. These opportunities are discussed further below.

Table 28: Correlation between projected employment growth and working age population growth, WOWC region, 2020 to 2030

Jurisdiction:	Projected employment growth rate (2020-2030)	Projected working age population growth (2020-2030)	Percentage point difference
Dufferin	8%	16%	+7%
Wellington (excl. the City of Guelph)	10%	14%	+4%
Norfolk	3%	5%	+2%
Brant (excluding Brantford)	9%	7%	-3%
Perth (excl. Stratford and St. Marys)	8%	5%	-3%
Oxford	10%	12%	+2%
Elgin (excluding St. Thomas)	18%	6%	-12%
Chatham-Kent	6%	-6%	-12%
Essex (excl. City of Windsor/Pelee)	8%	6%	-2%
Lambton	7%	-4%	-11%
Middlesex (excl. the City of London)	12%	12%	0%
Huron	2%	5%	+2%
Bruce	9%	7%	-2%
Grey	6%	3%	-3%
Simcoe (excl. Barrie and Orillia)	7%	11%	+4%
WOWC region	**8%**	**8%**	**0%**

Sources: Projected working age population growth rate based on Ontario Ministry of Finance projections by county (includes separated cities).

9.4 Estimated workforce supply and demand through 2040

Projecting out workforce demand through 2040 is even more challenging because there are so many unknowns. Will there be new industries that emerge as new drivers of economy activity much as the administrative services (call centre/back office) sector did in the 1990s and early 2000s? Will the information technology (IT) industry start to take off in Canada (and in the WOWC region) as some are projecting? The Information and Communications Technology Council is forecasting demand for an additional 250,000 digital technology jobs across Canada by just 2025[34].

Based on current trends as well as population and economy dynamics, the following factors are likely to influence workforce demand through 2040 across the WOWC region:

- The health care workforce demand will continue to grow, even with productivity gains,.
- Technological change could significantly reduce the size of the workforce in sectors such as transportation, manufacturing, professional services and retail trade. Automation and artificial intelligence (AI) are projected to have a substantial impact in the future. The challenge is

[34] Digital Talent Outlook 2025. ICTC. August 2021.

predicting when these changes will start to impact the workforce. For the purposes of this analysis employment growth in those sectors will slow but not decline by 2040.

- The share of people remaining in the workforce after age 65 (or after retirement from their first career) is likely to increase as many wish to remain active in the workforce but on their own terms (part time, seasonal, etc.). However, the WOWC region already has an above average share of the 65+ population active in the workforce.
- New growth sectors. There is interest in expanding access to local food. Some are projecting Ontario's tourism sector is poised for increased growth as the global population of retirees starts to travel more (beyond the pandemic). The federal government would like Canada to be more self-sufficient in critical mineral production likely resulting in more mining activity in the future. Biosciences and information technology are both expected to grow strongly through 2040 although the impact on the WOWC region is harder to predict.

To determine growth demand through 2040, the number of people working in 2040 was estimated using the Ontario Ministry of Finance population projections in that year. It was assumed the workforce participation rate would remain the same.

Similar to the analysis above looking at 2030, the projected replacement demand by 2040 was based on the estimated share of the workforce in 2020 that will be expected to migrate out of the workforce by 2040. It assumes the workforce participation rate among those aged 65 and older will remain the same in 2040 as in 2020.

The analysis was not developed at a sector level given the challenges as outlined above.

Based on the assumptions above, Table 29 provides the estimated workforce demand across the region by 2040. There will be 108,700 new workers required to address growth demand and another 288,700 to address replacement demand. Combine the region will need 397,400 workers over the next 20 years to ensure it can meet both growth and replacement demand.

Table 29: Estimated workforce demand 2020 to 2040, by jurisdiction, WOWC region

Jurisdiction:	Employment (2020)	Projected employment (2040)	Growth demand	Replace-ment demand	Total workforce demand
Dufferin	24,247	32,588	8,341	9,317	17,658
Wellington (excl. the City of Guelph)	46,794	61,234	14,441	19,984	34,424
Norfolk	23,730	29,303	5,572	10,954	16,526
Brant (excluding Brantford)	17,897	20,877	2,980	8,184	11,164
Perth (excl. Stratford and St. Marys)	19,616	22,530	2,914	9,517	12,431
Oxford	61,940	77,793	15,853	27,226	43,078
Elgin (excluding St. Thomas)	16,012	18,304	2,292	7,326	9,618
Chatham-Kent	46,943	43,691	-3,253	22,287	19,035
Essex (excl. City of Windsor/Pelee)	77,171	86,164	8,993	30,569	39,562
Lambton	60,674	69,055	8,381	27,854	36,235
Middlesex (excl. the City of London)	29,810	29,069	-740	13,323	12,582
Huron	28,150	31,883	3,733	14,769	18,502
Bruce	32,268	38,391	6,123	15,787	21,910
Grey	43,759	49,579	5,820	22,931	28,751
Simcoe (excl. Barrie and Orillia)	115,907	143,184	27,278	48,686	75,963
WOWC region	**644,917**	**753,645**	**108,728**	**288,713**	**397,442**

Sources: Statistics Canada, EMSI, Mellor Murray estimates.

9.5 Young workforce entrants

As of 2020, there are approximately 175,000 people aged 5-14 living in the WOWC region. This represents the maximum number of young people that could be added to the workforce by 2030 (at which point the oldest will be age 24). However, as shown in Table 30 only three-fourths of the population in the age group are actually employed during the year (either full time, part time or seasonal). As a result, the maximum local supply (excluding any outward migration) is likely closer to 130,000.

Table 30: Workforce participation rate, 15-24, by jurisdiction, WOWC region

County/Municipality	Participation Rate
Dufferin	73%
Wellington (excl. the City of Guelph)	78%
Norfolk	76%
Brant (excluding Brantford)	76%
Perth (excl. Stratford and St. Marys)	83%
Oxford	76%
Elgin (excluding St. Thomas)	74%
Chatham-Kent	70%
Essex (excl. City of Windsor/Pelee)	69%
Lambton	69%
Middlesex (excl. the City of London)	75%
Huron	82%
Bruce	79%
Grey	75%
Simcoe (excl. Barrie and Orillia)	70%
WOWC region	**74%**

Source: Statistics Canada 2016 Census.

There is a projected workforce supply 'gap' of potentially tens of thousands of workers in just the 2020 to 2030 period. If the WOWC region was only able to rely on the local population to meet workforce needs through 2030, there would be a potential gap of over 84,000 workers.

It is unrealistic to assume all of the 175,000 residents aged 5-14 will remain in the region long term. Like the rest of Canada, the young population in the WOWC region is mobile. People move in and out of the region for many reasons.

Table 31 shows the net migration from the counties in the WOWC region including the separated cities. Over the past five years, all but four of the 15 counties lost more young people to outward migration then gained through inward migration. Much of the youth migration is heading towards the big cities.

Table 31: Average annual net migration 2016-2020, population 18-24, WOWC region

	Net intraprovincial migration	Net interprovincial migration	Combined
Dufferin	-27	-34	**-61**
Wellington	245	-10	+234
Haldimand-Norfolk	-60	-24	**-84**
Brant	56	-25	+30
Perth	-55	-16	**-71**
Oxford	9	-46	**-36**
Elgin	-123	-17	**-140**
Chatham-Kent	-142	-17	**-159**
Essex	-307	-46	**-353**
Lambton	-120	-21	**-141**
Middlesex	385	-43	+342
Huron	-19	-18	**-37**
Bruce	-17	-13	**-29**
Grey	13	-15	**-2**
Simcoe	375	-217	+157

Sources: Statistics Canada Table 17-10-0140-01.

9.6 Post-secondary education pipeline

As discussed elsewhere in this report, the WOWC region (including separated cities) has fewer post-secondary student enrolments compared to the province overall and the growth rate in enrolments has lagged the rest of the province over the past few years. This could put the region at a competitive disadvantage. As workforce demand grows significantly into the future, it will be important for the post-secondary education system to ramp up to support this increased demand with a specific focus on those sectors and occupations in the highest demand.

9.7 Immigration

The WOWC region attracts considerably fewer immigrants each year than the rest of the province, relative to population size. Table 32 shows the number of permanent residents (PRs) admitted by year into the region since 2015. As of 2020/2021, the region attracts about 1.7% of the total PRs admitted to Ontario each year even though it is home to 11.3% of the province's total population. Adjusted for size, then, the WOWC region is attracting over 80% fewer immigrants per year.

The annual intake has been rising in recent years. In 2015, there were just under 1,600 immigrants admitted to the region and by 2019 the number had increased to over 2,500. So far in 2021, after the first two quarters, the region is on the way to setting a new record.

Table 32: Admissions of Permanent Residents by County and Year, WOWC region

	2015	2016	2017	2018	2019	2020	Q1 & Q2 2021
Middlesex (excl. London)	30	40	40	40	60	25	35
Essex (excl. Windsor)	215	365	305	355	450	235	175
Wellington (excl. Guelph)	50	125	75	70	95	50	50
Simcoe (excl. Barrie and Orillia)	360	385	405	445	510	310	290
Brant	15	10	40	30	20	30	20
Oxford	115	165	115	135	200	125	85
Lambton	140	150	155	180	205	110	140
Chatham-Kent	115	150	120	120	170	90	75
Norfolk County	55	50	70	105	110	60	30
Elgin	110	115	110	155	160	80	55
Perth	110	120	130	150	170	80	105
Bruce	55	100	80	70	90	70	60
Dufferin	125	105	85	135	125	70	65
Huron	25	85	75	50	65	50	35
Grey	65	100	80	110	80	50	60
WOWC region	1,585	2,065	1,885	2,150	2,510	1,435	1,280

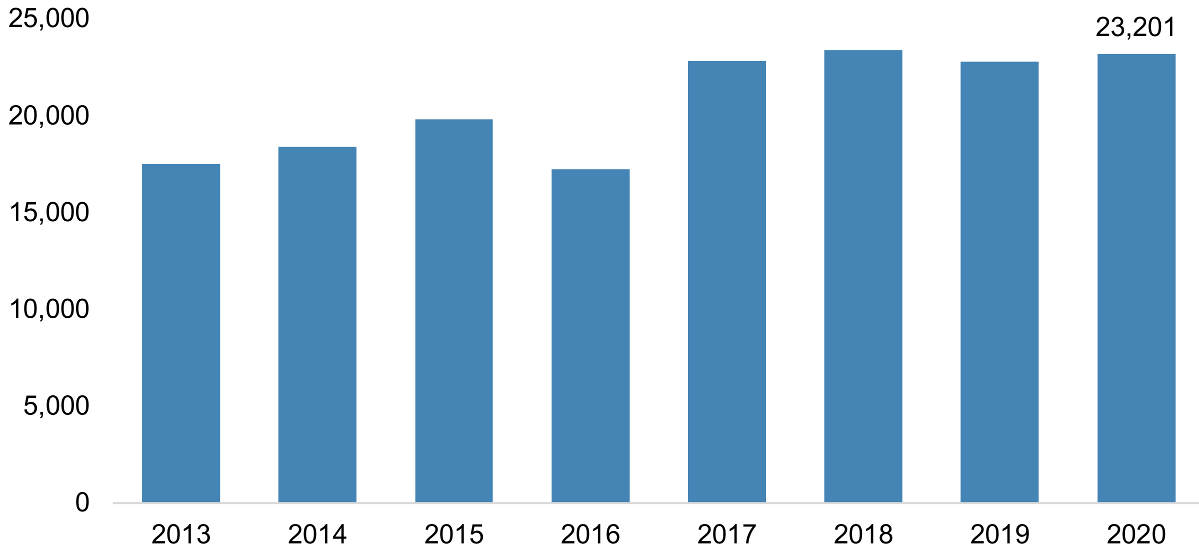
Source: IRCC

9.8 Temporary foreign workers

Temporary foreign workers (TFWs) have become a vital source of labour for a number of important industries across Canada such as agriculture and fish processing. Across Canada, in the past three years there have been an annual average 121,000 Temporary Foreign Worker (TFW) Positions on Positive Labour Market Impact Assessments (LMIAs). Over 40,000 of those TFWs were working in Ontario and of those working in Ontario, 23,000 are employed in the WOWC region.

In fact, the economy in the WOWC region is quite reliant on temporary workers. Nearly 4% of all workers in 2020 were temporary foreign workers. Figure 35 shows the trend in the number of TFWs on positive LMIAs over the past few years in the WOWC region.

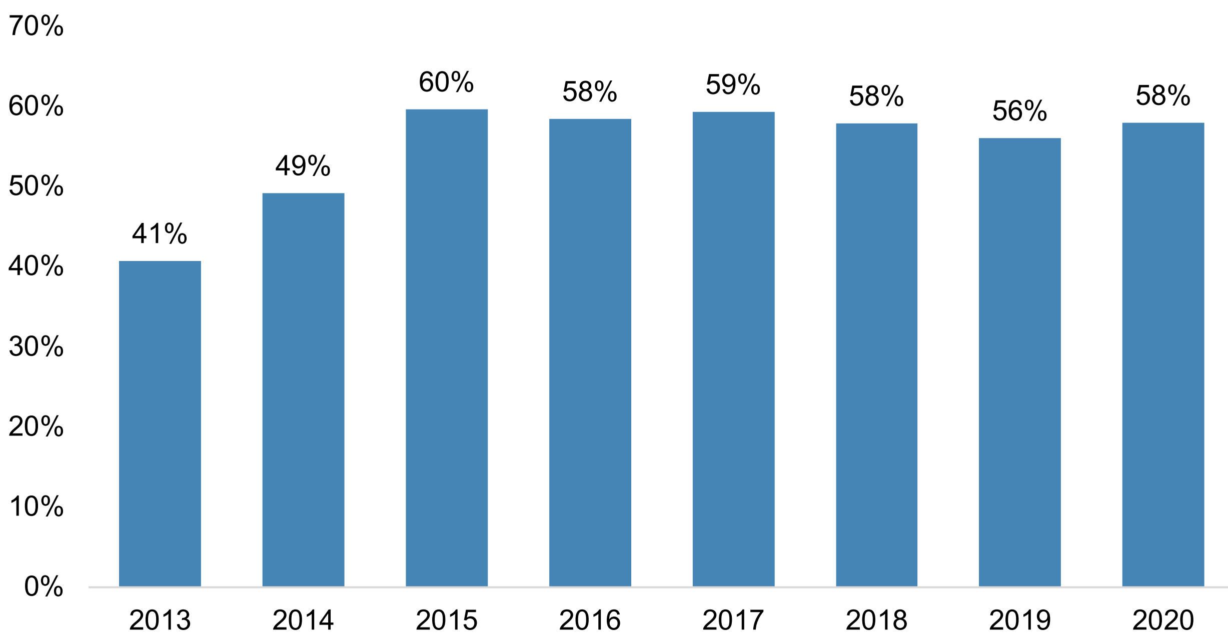
Figure 35: Temporary Foreign Worker (TFW) Positions on Positive Labour Market Impact Assessments (LMIAs) by year, WOWC region



Source: IRCC

To put this into perspective, 58% of all TFWs working in Ontario in recent years have been employed in the WOWC region (Figure 36).

Figure 36: Temporary Foreign Worker (TFW) Positions on Positive Labour Market Impact Assessments (LMIAs) by year, WOWC region as a percentage of the Ontario total



Source: IRCC

Another way to show the importance of TFWs to the WOWC region is to adjust the number to the size of population and compare it to Ontario overall. In the WOWC region, there were 140 TFWs per 10,000 population in 2020 compared to only 13 in the rest of Ontario, nearly 11 times more.

Figure 37: Temporary Foreign Worker (TFW) Positions on Positive Labour Market Impact Assessments (LMIAs), per 10,000 population

Source: IRCC

Finally, Table 33 shows the municipalities in the WOWC region with the highest share of TFWs both in absolute terms and adjusted for population size. Norfolk County was home to the most TFWs in 2020 with 4,700 followed by Leamington with 3,826, Kingsville with 2,563 and Chatham-Kent with 2,000.

Adjusted for population size, the municipalities most reliant on TFWs were Leamington (129 TFWs per 1,000 population), Southwold (125 per 1,000) and Kingsville (110 per 1,000).

Table 33: Temporary Foreign Worker (TFW) Positions on Positive Labour Market Impact Assessments (LMIAs), per 10,000 population

Municipality:	TFWs	Per 1,000 population	Municipality:	TFWs	Per 1,000 population
Adjala-Tosorontio	129	11	Malahide	314	31
Bayham	438	55	Meaford	129	11
Blandford-Blenheim	161	20	Middlesex Centre	133	7
Bradford West Gwillimbury	293	7	Norfolk County	4,700	67
Brant	937	24	Norwich	203	17
Brockton	135	13	Plympton-Wyoming	183	22
Chatham-Kent	2,000	19	South Huron	363	34
Clearview	143	10	South-West Oxford	130	16
Dawn-Euphemia	135	60	Southwold	601	125
Essex	165	8	Strathroy-Caradoc	209	9
Innisfil	117	3	Tecumseh	131	5
Kingsville	2,563	110	Thames Centre	122	9
Lakeshore	590	15	The Blue Mountains	506	59
Leamington	3,826	129	Tillsonburg	232	13

Source: IRCC

9.9 Older workers

People living in the WOWC region tend to stay in the workforce longer than those in other regions. The large agricultural workforce is the main reason for the older workforce as farmers tend to work well into their 70s. Table 34 shows the workforce participation rate among the population age 65 and older in the WOWC region by jurisdiction from the 2016 Census. Across the region, 22% of the population age 65 and older was active in the workforce ranging from a high of 31% in Perth to a low of 18% in Essex and Lambton.

It is important to point out that less than one in three workers aged 65 and older worked full time and full year. Over half of the workers did not work the full year (worked seasonally) and another 17% worked year-round but only in a part time role. Again, there is considerable difference by jurisdiction. In Brant (excluding Brantford), 40% were employed in full-time, year-round jobs compared to only 26% in Lambton County.

Table 34: Workforce activity among those aged 65+, WOWC region

		Among those who worked:		
Jurisdiction:	**% 65+ who worked**	**% worked seasonally**	**% worked full year part time**	**% worked full year full time**
Dufferin	27%	51%	13%	36%
Wellington (excl. the City of Guelph)	27%	49%	18%	33%
Norfolk	20%	55%	17%	28%
Brant (excluding Brantford)	24%	45%	15%	40%
Perth (excl. Stratford and St. Marys)	31%	45%	18%	37%
Oxford	20%	50%	19%	31%
Elgin (excluding St. Thomas)	25%	52%	16%	32%
Chatham-Kent	20%	54%	15%	31%
Essex (excl. City of Windsor/Pelee)	18%	54%	15%	31%
Lambton	18%	57%	17%	26%
Middlesex (excl. the City of London)	26%	49%	19%	32%
Huron	25%	48%	21%	31%
Bruce	22%	51%	18%	31%
Grey	23%	49%	19%	32%
Simcoe (excl. Barrie and Orillia)	20%	54%	15%	30%
WOWC region	22%	52%	17%	31%

Source: Statistics Canada 2016 Census.

9.10 Other potential target groups

There are other potential sources of labour that could help meet workforce demand into the future. Current and accurate data on these groups is challenging to access, particularly at the county or municipality level. These groups include:

- LGBTQ2+
- Indigenous peoples
- Persons with a disability

The 2021 Census will provide more accurate and current information on the workforce participation among these groups in the WOWC region.

9.11 Summary of Workforce Planning Board Findings & Initiatives

Table 35 provides a summary of the various workforce development actions underway across the WOWC region by Workforce Planning Board as outlined in the individual Local Labour Market Plans and special projects listed on their respective websites. Additional research with each Workforce Planning Board was beyond the scope of this project but the majority of Workforce Planning boards also participated in the Community Workshops and encouraged their networks to participate in the business survey.

Table 35: WOWC Workforce Planning Board Initiatives by Board

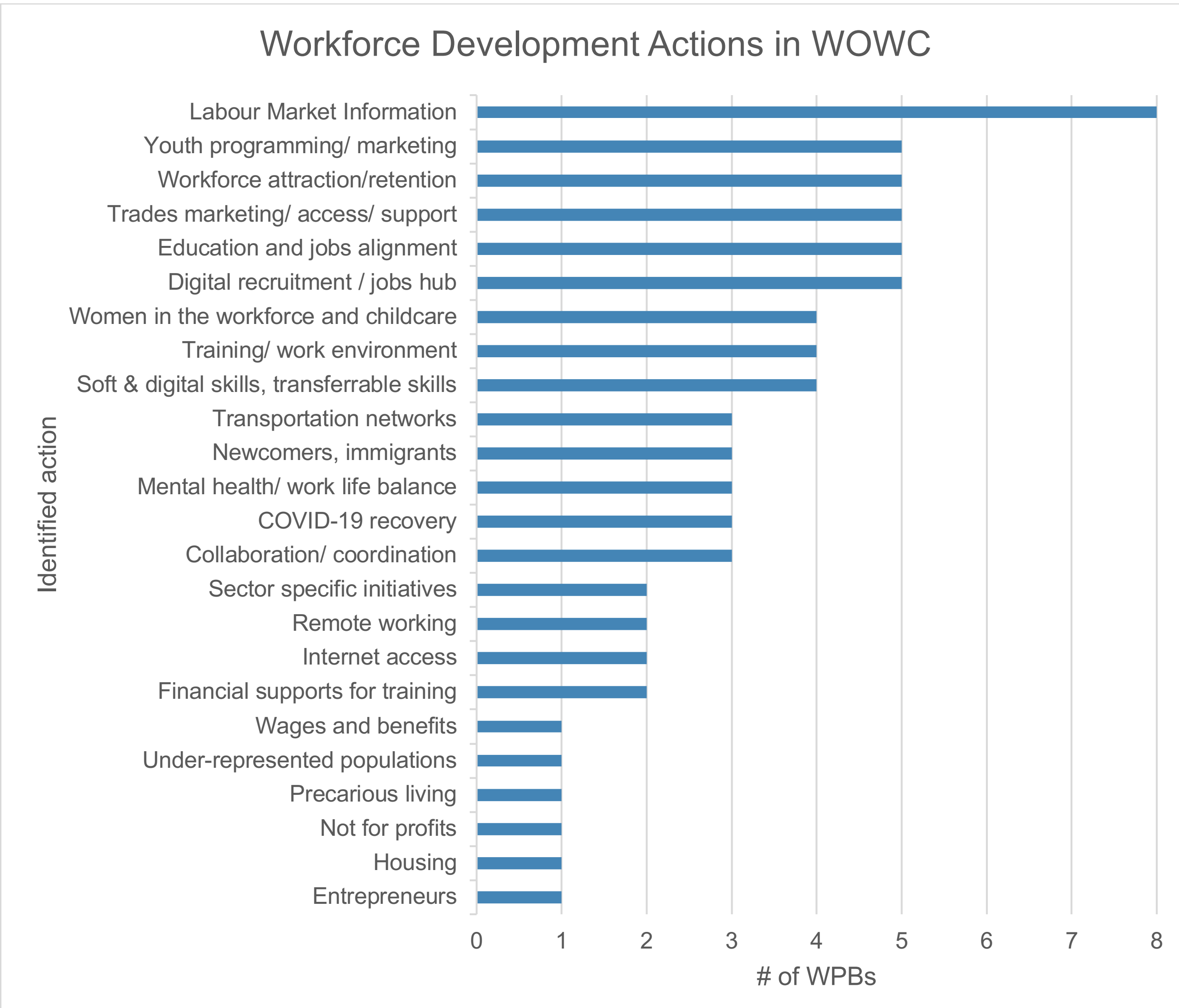
Workforce Development Actions	Chatham-Kent	Elgin, Middlesex, Oxford	Four Counties (Grey, Bruce, Huron & Perth)	Grand Erie	Sarnia-Lambton	Simcoe Muskoka	Waterloo Wellington Dufferin	Windsor Essex
Collaboration/ coordination	■	■			■			
COVID-19 recovery	■				■		■	
Digital recruitment / jobs hub	■		■	■			■	■
Education and jobs alignment	■			■		■	■	■
Entrepreneurs					■			
Financial supports for training			■			■		
Housing			■					
Internet access	■		■					
Labour Market Information	■	■	■	■	■	■	■	■
Mental health/ work life balance				■	■		■	
Newcomers, immigrants					■		■	■
Not for profits							■	
Precarious living				■				
Remote working	■						■	
Sector specific initiatives		■		■				
Soft & digital skills, transferrable skills	■					■	■	■
Trades marketing/ access/ support		■	■	■	■	■		
Training/ work environment		■	■		■	■		
Transportation networks			■	■		■		
Under-represented populations							■	
Wages and benefits			■					
Women in the workforce and childcare		■	■		■			■
Workforce attraction/retention	■	■			■	■		■
Youth programming/ marketing		■	■	■			■	■

Mellor Murray Consulting review of Workforce Planning Board websites, August 2021

As demonstrated in Figure 38, all the Workforce Planning Board compile, analyze and share labour market information for their respective districts. The majority (5 of the 8) also provide youth programming and marketing, workforce attraction and retention initiatives, promotion of trades careers, support the alignment of locally available education or training and employer needs and support digital recruitment or jobs hubs.

Half of the Workforce Planning Boards have identified women in the workforce and childcare, training and enhancements to the work environment and soft and digital skills as key elements of their local labour market plans.

Figure 38 Workforce Development Actions by Workforce Planning Boards in WOWC Region



Mellor Murray Consulting review of Workforce Planning Board websites, August 2021

WESTERN ONTARIO WOWC WARDENS CAUCUS | WORKFORCE STRATEGY

MARKETING AND COMMUNICATIONS

Promoting the WOWC Region

10 Marketing and Communications

10.1 Market-Ready Kits

This section provides a review of several regional marketing tools used by other regional organizations that could provide some guidance for the development of a regional tool kit for the Western Ontario Workforce Strategy. This section includes a review of seven regional toolkits.

- **Marketing Hometown America** – a step by step guide to establishing and implementing a resident attraction strategy for rural communities
- **Regional Australia** – A livability toolkit for rural regional communities
- **Experience York Region** – Social media toolkit for tourism operators
- **Appalachian Regional Commission** – regional data
- **Columbia Basin Rural Development Institute** – community profiles
- **Rural Ireland –** Video promotional campaign
- **British Columbia Economic Development** – Investment readiness self-assessment checklist

Developing a toolkit to support WOWC's marketing objectives

The first rule of successful marketing is to identify the target markets for the marketing effort. From a high level view the following target market could be considered for the WOWC.

- **New entrants to the workforce:** Encouraging existing residents and pending graduates from secondary education institutions, to see the value in working and contributing to their community
- **Urban residents:** Explaining the features and benefits of moving from a major urban centre to a place with a slower pace and space to raise a family (migrants).
- **Immigrants:** Currently Canada is recognized as one of the most popular destination countries for international newcomers (international migrants[35]). In 2016 almost half of all immigrants between the age of 26 to 64 held a bachelor's degree[36]
- **Refugees**: Between January 2015 and December 2018 Canada resettled 121,785 refugees[37]. Three in five of these refugees (74,005) intended to settle in Ontario or Quebec[38]

The objective of the Western Ontario Workforce Strategy is to develop a strategically focused toolkit as a guide to assist in attracting the right individuals to fulfill specific workforce needs.

Below are examples of regional programs that have been successfully used to attract and retain new residents, workers and investors to rural areas. The resources reviewed include comprehensive websites, high quality YouTube advertising videos, and specific step-by-step toolkits delivered as PDF documents. These toolkits have enabled communities to create

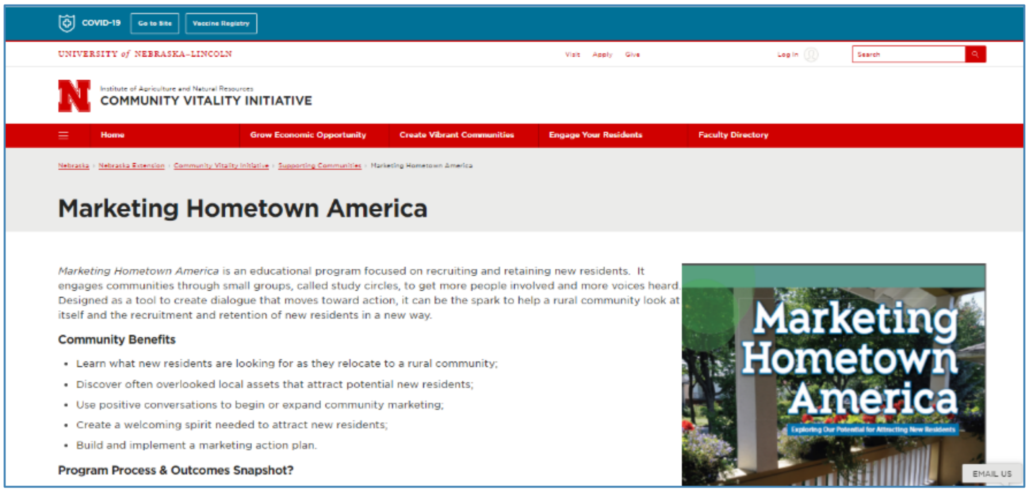
[35] Migration Policy Institute (MPI) Data Hub. 2017 "Top 25 Destinations of International Migrants".
[36] Statistics Canada. 2017 "Education in Canada: Key results from the 2016 Census", https://www150.statcan.gc.ca/n1/daily-quotidien/171129/dq171129a-eng.htm
[37] Immigrants and Refugees to Canada: The Role of Municipalities. Canadian Commission for UNESCO
[38] Government of Canada. Immigration, Refugees and Citizenship Canada 2018."Resettled Refugees- Monthly IRCC Updates", https://open.canada.ca/data/en/dataset/4a1b260a-7ac4-4985-80a0-603bfe4aec11

customized marketing campaigns in line with their budgets. The toolkits allow the users to understand the target market personas and their motivations, use simple videos to show real life community experiences and successes, and focus on the power and reach of digital marketing, specifically social media, as a symbiotic tool between the region and its partners.

Case Study: Marketing Hometown America

North Dakota, South Dakota and Nebraska

https://communityvitality.unl.edu/marketing-hometown-america-0



Source: Website of University of Nebraska-Lincoln
https://communityvitality.unl.edu/marketing-hometown-america-0

Background

“Marketing Hometown America”[39] is an educational program intended to assist rural communities to recruit and retain new residents. This pilot project was developed by University of Nebraska-Lincoln and funded by a University of Nebraska Rural Futures Institute grant.

Communities in North Dakota, South Dakota and Nebraska took part in the program, each working with the toolkit “Marketing Hometown America Guide”[40]. The program provides the steps to bring communities together to discuss local issues, create an action plan to help achieve their goals and promote growth within the community.

The process starts with a “study circle” which engages community members through small groups. Designed as a tool to create dialogue that moves toward action, it can be the spark to help a rural community look at itself and the recruitment and retention of new residents in a new way. Each community is encouraged to identify their own actions to address their specific goals.

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[39] Website of University of Nebraska-Lincoln: https://communityvitality.unl.edu/marketing-hometown-america-0
[4040] Peggy Schlechter, Community Development Field Specialist, South Dakota University Extension: https://m.youtube.com/watch?v=Si75I5qgd6I

Examples of some of the resulting achievements include:

- Neligh, Nebraska produced a series of videos to showcase what the town has to offer and promoted these videos on their website and social media with the hashtag #thisismyneligh[41]
- Wessington Springs, South Dakota, developed new logos and a brand guidelines document for their website & social media[42]
- Kimball, Nebraska, created an action plan to pin-point areas for improvement. “It taught us to look at ourselves and what assets exits in the community”[43]
- In Hot Springs, South Dakota, the process led to new signs, restoration of a historic landmark and improved lighting for recreation areas. Hot Springs participant Cindy Donnell[44] explains that the improvements done via the project has led to several investors buying and developing properties in the area thus helping Hot Springs reach their vision of once again being a world class resort town.

Other community benefits of Marketing Hometowns America include:[45]

- Learning what new residents are looking for as they relocate to a rural community.
- Discovering often overlooked local assets that attract potential new residents.
- Using positive conversations to begin or expand community marketing.
- Creating a welcoming spirit needed to attract new residents.
- Building and implement a marketing action plan.
- New community leaders stepping up
- Adults and young people becoming more engaged with the community
- The effort boosted civic awareness and lifted community spirit[46]

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[41] Video: https://m.youtube.com/watch?v=Si75I5qgd6I
[42] Video: https://m.youtube.com/watch?v=Si75I5qgd6I
[43] Kerry Ferguson, Director, Community Relations Kimball Health Services: https://m.youtube.com/watch?v=Si75I5qgd6I
[44] Cindy Donell, resident Hot Springs: https://m.youtube.com/watch?v=Si75I5qgd6I
[45] Website of University of Nebraska-Lincoln: https://communityvitality.unl.edu/marketing-hometown-america-0
[46] Video: https://m.youtube.com/watch?v=n0E23sRpbd0

Case Study: Marketing Hometown America	
Campaign Title	Marketing Hometown America
Campaign Tagline	Exploring Our Potential for Attracting New Residents
Key Strategic Objectives	• To empower the individual communities to self-evaluate what they had to offer newcomers. • A step-by step framework to encourage community members to work as a team, identify priorities and set strategic objectives. • To establish SMART (Specific, Measurable, Attainable, Realistic, Timely) marketing goals.
Key Strategic Items to be considered by WOWC & its members	• A high-level self-evaluation document of community assets which is broad enough to be used by any of the WOWC member municipalities • A diverse working committee of community members and stakeholders and strategic partners to propel the project forward from a high conceptual level to the actual implementation of proposed marketing tools. • Engagement with local high schools and post-secondary institutions to participate in the creation of and execution of some marketing assets.

Case Study: Strengthening Livability: A toolkit for Rural Regional communities

Regional Australia

http://www.regionalaustralia.org.au/home/liveability-toolkit/

Source: http://www.regionalaustralia.org.au/home/liveability-toolkit/

Regional Australia[47] includes all towns, small cities and areas that lie beyond the major capital cities (Sydney, Melbourne, Brisbane, Perth, Adelaide and Canberra). Regional Australia contributes one third of the national output and is home to 9.45 million Australians.

Analysis of the human and physical patterns and the interconnectedness of the towns and cities identified across rural Australia, revealed many previously hidden insights about the economy, and its future potential. It demonstrated that regions outside the major cities are an important source of Australia's economic growth.

Based upon interview findings, and key learnings from past regional migration approaches Regional Australia developed a toolkit with a step-by-step approach based upon the following '7 Building Blocks of Settlement Success[48]:

1. Gather your local champions
2. Know your neighbours
3. Map out mobility of target markets
4. Predict jobs and skills needs
5. Know your target market
6. Assess local liveability
7. Activate

[47] Website of Regional Australia: http://www.regionalaustralia.org.au/home/what-is-regional-australia/
[48] Steps to Settlement Success – A toolkit for rural and regional communities

Case Study: Regional Australia Institute – Strengthening Livability	
Campaign Title	Steps to Settlement Success
Campaign Tagline	A Toolkit for Rural and Regional Communities Looking to Grow
Key Strategic Objectives	• To provide quantifiable data and insights based on rural and regional research. • To develop a toolkit in response to the growing need in regional communities to attract and retain populations[49] • To provide a guide to help regional leaders gather and analyse the data to develop a tailored action plan to improve their town's liveability[50]
Key Strategic Items to be considered by WOWC & it's members	• Municipalities need to understand "liveability" factors to develop for targeted marketing efforts • It is equally important to understand what people are looking for in a regional lifestyle, including health care organizations, education institutions, amenities, community connectedness, cost of living, lifestyle and opportunity. • Communities should track mobility trends in the region, identify and acknowledge the strengths and challenges to each community, municipality and region as a whole.

[49]Regional Australia Institute: About this Toolkit. http://www.regionalaustralia.org.au/home/wp-content/uploads/2021/03/LiveabilityToolkit_WEB2.pdf
[50] Regional Australia Institute: About this Toolkit. http://www.regionalaustralia.org.au/home/wp-content/uploads/2021/03/LiveabilityToolkit_WEB2.pdf

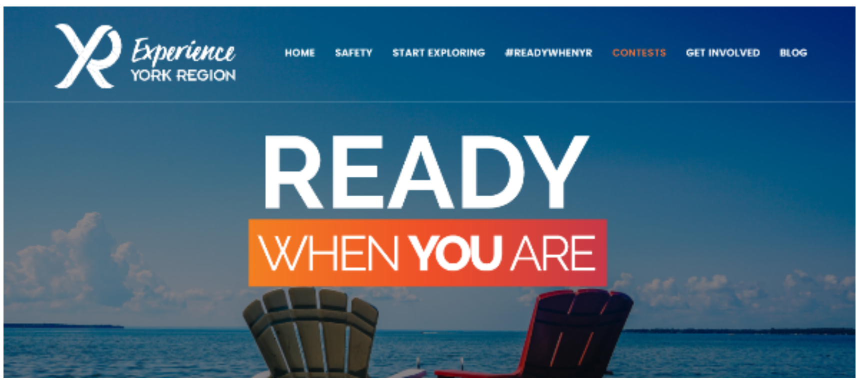
Case Study: Social Media Toolkit #ReadyWhenYR

Experience York Region, ON

https://readywhenyr.com/

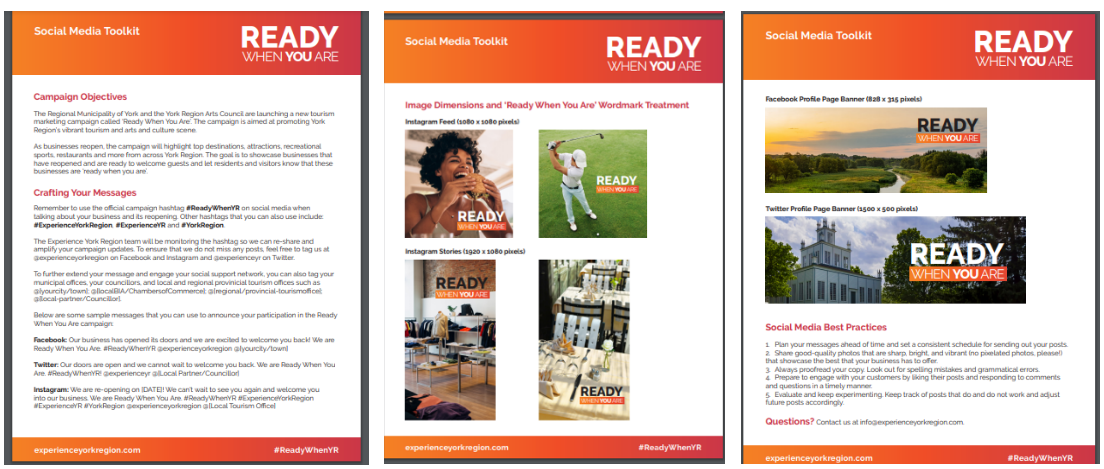
The Regional Municipality of York and the York Region Arts Council launched a new tourism marketing campaign in 2020 called "Ready When You Are". The objective was to promoteYork Region's vibrant tourism and arts and culture scene as the COVID-19 restrictions were loosening.

York Region initially created a distinct website as a marketing hub for all the related marketing campaigns using the URL "readyWhenYR" to assist with tracking and analyzing any relevant data. As of 2021 "readyWhenYR" has been incorporated into the main Experience York Region site.



Source: Experienceyorkregion.com

Experience York Region created a social media toolkit to provide all the 'how to and best practices' to support and help tourism operators and local businesses to be consistent with the campaigns look, feel and messaging.



Source: http://www.experienceyorkregion.com/wp-content/uploads/2020/08/ReadyWhenYR-Campaign-Toolkit-FINAL.pdf

Participating tourism operators were encouraged to use the official campaign hashtag #readyWhenYR on all relevant social media posts. Other hashtags included #ExperienceYorkRegion, #ExperienceYR, and #YorkRegion. The Experience York Region team requested that each post be hash tagged to allow for further reach. They also suggest tagging the municipal offices, councillors, and local and regional provincial tourism offices for even more impact. The toolkit provided examples to illustrate exactly how they should appear on Facebook, Twitter, and Instagram.

The toolkit includes content suggestions for photo and video ideas, links to ReadyWhenYR logo and wordmarks, sources for free stock photography, recommended design programs and instructions how to save the files for upload. The document includes a short list of social media best practices and provides a specific email address for follow up for any questions.

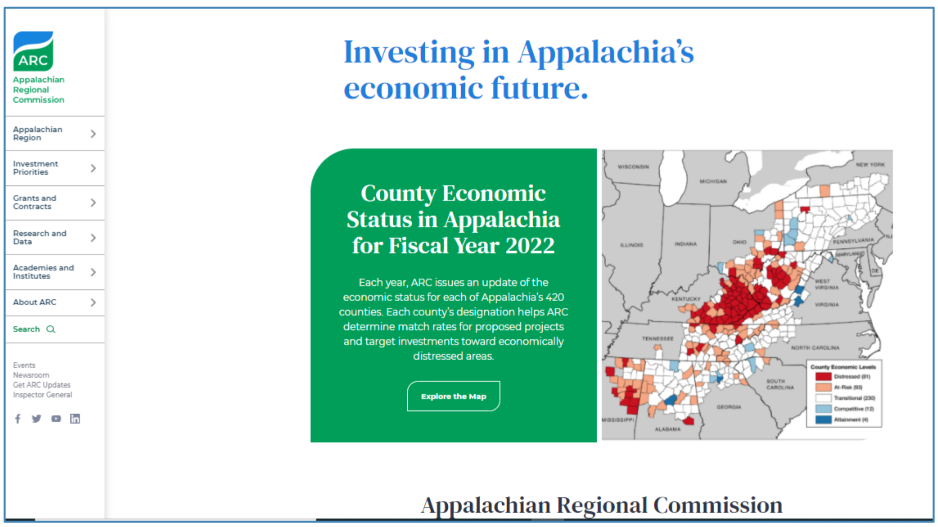
Case Study: **Experience York Region – Ready When You Are**	
Campaign Title	Ready When You Are
Campaign Tagline	Ready When YR
Campaign Call to Action	#ReadyWhenYR as there does not seem to be a dedicated call to action
Key Strategic Objectives	• A high-level campaign that is flexible enough to work in conjunction with the official marketing department of York Region and as an invitation for community members, stakeholders and visitors to participate as ambassadors • To engage the community, stakeholders and visitors • To provide marketing tools to allow participants to adapt the tools they like to use, for their individual information, point of view or experience to share across whatever social media platforms they are comfortable with
Key Strategic Items to be considered by WOWC and it's members	• Establish a regional Core Brand Campaign that over time will re-enforce the features and benefits of the WOWC Region as actively working to attract and retain people to rural living/working • Create the regional campaign in such a way that it can be flexible enough to allow for 15 sub brands (one for each municipality based upon their specific goals and objectives) allowing for their specific features and benefits, while building a deeper level of recognition for the region as a whole.

Case Study: Regional data

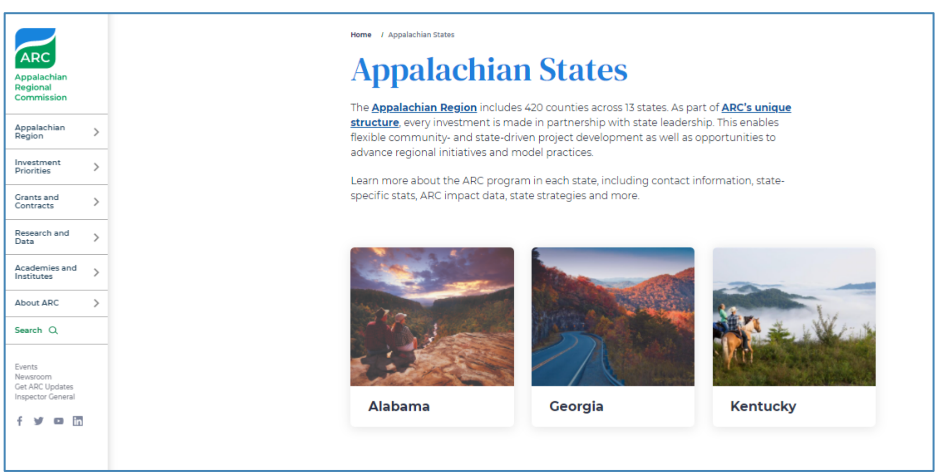
Appalachian Regional Commission

https://www.arc.gov/

The ARC website is a comprehensive resource which leads its visitors, whether they are prospective targets looking to re-locate, or investors needing practical information about investment opportunities and workforce readiness, through an easy-to-follow information resource, with simple and clear language so anyone can understand what each of the 130 counties across 13 states has to offer. Visitors can get a quick snapshot or deep dive into regional data. This includes searchable socioeconomic data profile by County that includes national, state and Appalachian averages for population, income, unemployment, poverty, education, and geography.



Source: Appalachian Regional Commission website: https://www.arc.gov/



Source: Appalachian Regional Commission website: https://www.arc.gov/

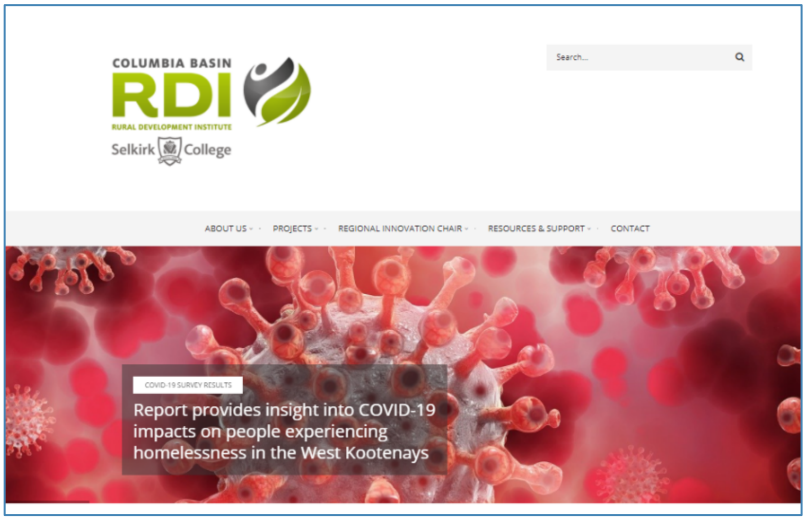
Case Study: **Appalachian Regional Commission – Investing in Appalachia Economic Future**[51]	
Campaign Title	Investing in Appalachia Economic Future
Key Strategic Objectives	• To provide relevant information for prospective investors on the region or a specific County • To provide content that supports and cultivates partnerships and helps to connect communities • To make it clear that ARC is available to help with any information request
Key Strategic Items to be considered by WOWC & it's members	• Marketing content should be clear, concise and of use to the target market. • Websites are the primary marketing tool and are becoming more sophisticated by integrating third-party tools, GIS-enabled maps, user-friendly platforms for regular updates and responsive technology. • The use of Customer Relationship Management (CRM) tools is a best practice to manage and track relationships. • CRM assists with the exchange of information, customer data analysis, customer service and targeted lead generation. • Develop content geared to establishing two-way communication, and creating lead generation, brand recognition, authenticity, and trust. • Connections with decision makers should be as friendly and easy as possible • Contact information for customer service should include the contact's name, title and all the ways they can be reached including: email, office phone, cell phone, social media handles. • Consider integrating chatbots in the website to provide visitors with real-time responses over the internet

Case Study: Community Profiles and Communications Strategy

Columbia Basin Rural Development Institute

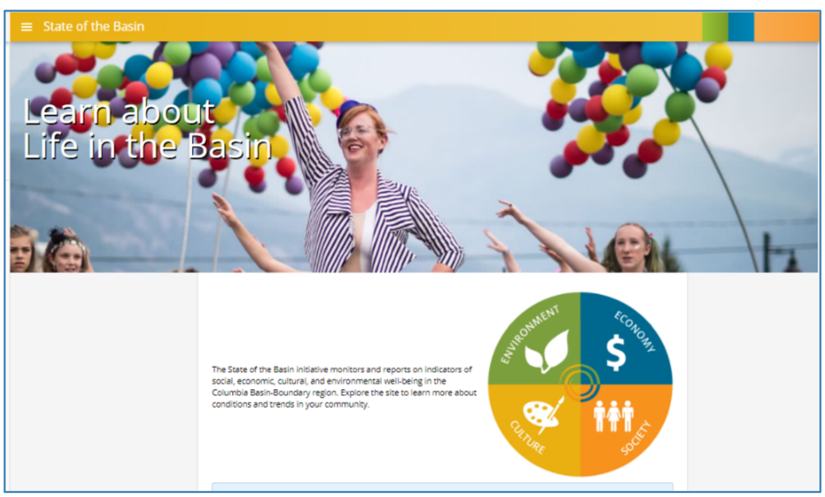
http://www.cbrdi.ca/ https://stateofthebasin.ca/reports-resources/community-profiles

The Columbia Basin Rural Development Institute (RDI) at Selkirk College's Applied Research and Innovation Centre, uses a website as its primary tool to educate, and provide in depth information on challenges affecting rural communities, environment, and economies.

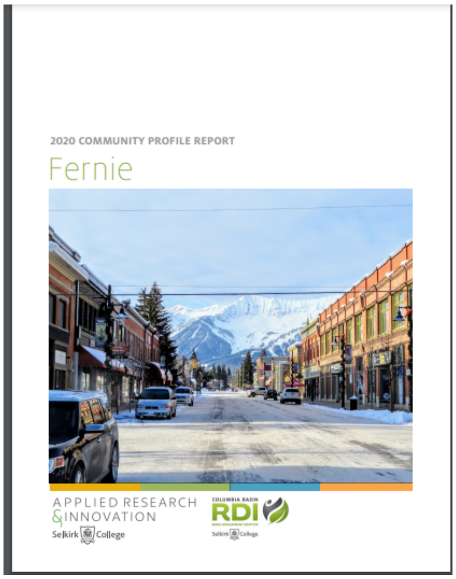


Source: http://www.cbrdi.ca/

A visitor-friendly sister website called State of the Basin provides on indicators of social, economic, cultural, and environmental data to demonstrate the Columbia Basin-Boundary region. The site includes many downloadable resources that provide up-to-date data and analysis of the Basin.



Source: Columbia Basin Rural Development sister website; State of the Basin website https://stateofthebasin.ca

	
Source: Columbia Basin Rural Development sister website; State of the Basin website https://stateofthebasin.ca/reports-resources/community-profiles	Source: https://stateofthebasin.ca/statics/reports/SotB_SnapshotReport_2020.pdf https://stateofthebasin.ca/statics/reports/SotB_SnapshotReport_2020.pdf

The site includes a comprehensive collection of individual Community Profiles (as downloadable PDFs), one for each municipality and electoral area within the Columbia Basin-Boundary Region. Each profile is designed as an approximately 36-page information report, including a wide range of information that covers: location and demographics, families and household characteristics, mobility, cultural characteristics, infrastructure, housing, income, labour force, education, quality of life & civic engagement, business, local government, environment and gaps and further research. The community profiles follow a consistent, branded design format.

The Columbia Basin RDI also produces a monthly e-newsletter and an annual "Snapshot" PDF. The Snapshot Report provides a high-level overview of the entire Basin. It is a condensed and more visually appealing (only 12 pages of content), version of the Community Profile.

Case Study: Columbia Basin Rural Development Institute	
Campaign Title	State of the Basin
Campaign Tagline	Snapshot Report
Key Strategic Objectives	• To provide an attractive, public facing report that delivers complex information in a very user-friendly way via a professionally designed document. • To provide a visual heavy document with multiple graphic charts, info graphics, professional quality photographic images to support the concise narrative.
Key Strategic Items to be considered by WOWC & it's members	• "Public facing" marketing materials need to be clear, concise, visually appealing, contemporary looking and professionally produced. • Brand management needs to be consistent across all marketing materials to keep everything consistent, including a Core Brand Campaign theme, a supporting tagline and a call to action • Brand management includes consistency in key marketing messaging, typographical fonts and "look and feel" of the professional photography.

Case Study: Our Rural Future Video Campaign

Rural Ireland

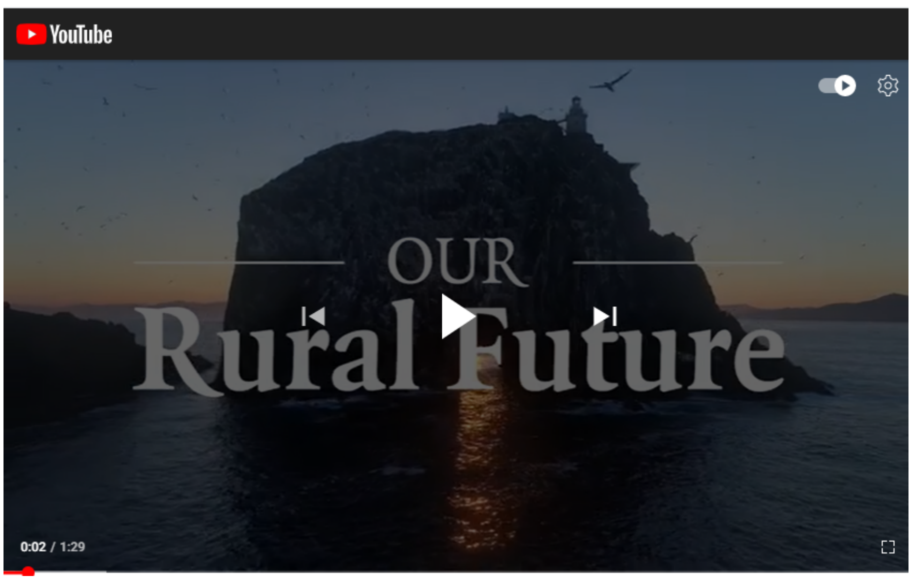
The Republic of Ireland has just launched the #OurRuralFuture 2021-2025 Campaign, with a highly professional YouTube video called Our Rural Future.

This one-and-a-half-minute video uses storytelling to engage, inform, persuade and inspire its target audience, and provides the call to action to learn more.

The video cleverly combines rural Ireland's history and natural beauty with a modern lifestyle and economic development objectives while highlighting the community and its people, spoken in language that is easy to understand and provides an emotional connection. This campaign is designed to be used shared through social media.

Key messages in the videos include:[52]

- Re-vitalize our rural towns
- Let's re-imagine our rural communities
- Our rural towns are special
- A brighter future for all



Source: https://m.youtube.com/watch?v=nOF8jxRRJMo

[52] Rural Development Policy 2021-2015 Launch Video: https://m.youtube.com/watch?v=nOF8jxRRJMo

Case Study: **Our Rural Future – Rural Development Policy 2021-2025**	
Campaign Title	Our Rural Future
Campaign Call to Action	#OurRuralFuture
Key Strategic Objectives	• To provide inspirational marketing videos using storytelling as a strong and flexible campaign foundation across digital, print, broadcast, social media platforms. • To provide a high-level marketing Core Brand Campaign "Our Rural Future". • To produce superior professional videos, one format (The Core Brand Campaign) is used to express all the positive reasons, to attract and retain people • To produce a series of professional videos that profile existing businesses and tell their stories demonstrating what is possible, the positive economic impact, contribution to community revitalization and future success. Each of these videos follow a Core Brand template.
Key Strategic Items to be considered by WOWC & it's members	• Invest in a clear, focused marketing plan to provide direction for the development of a world class Core Brand Campaign (from WOWC) with the flexibility for all 15 municipalities to adapt the identified Core Brand Campaign theme and call to action that reflect their unique needs and abilities, while maintaining the original Core Brand Campaign through visuals, messaging, call to action, etc. • Invest in the professional development of a robust and flexible Core Brand and a Core Brand Campaign • Use marketing professional to develop marketing templates for individual municipalities to create content across all appropriate platforms.

Case Study: Investment Readiness Assessment Checklist B.C. Communities

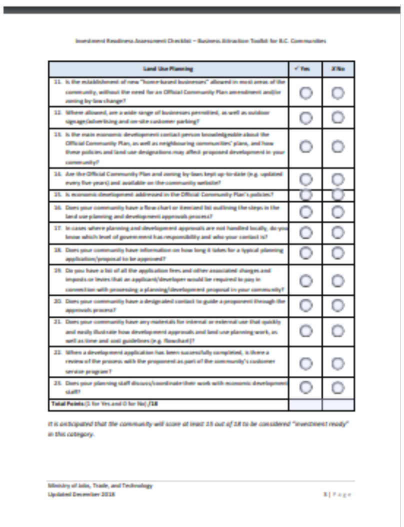
Province of British Columbia

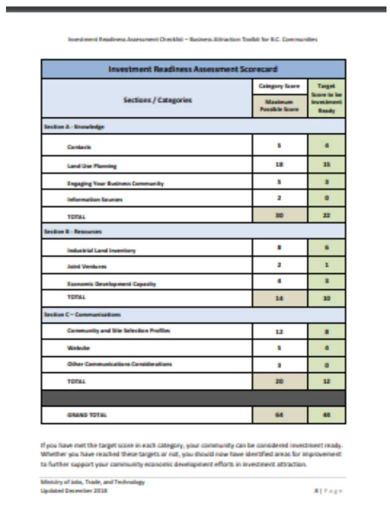
https://www2.gov.bc.ca/gov/content/home

This self-assessment tool has been developed to determine a community's "investment readiness"[53]. This refers to a community's ability to attract, respond, and successfully secure business investment. The checklist is divided into three themes – Knowledge, Resources and Communications.[54]

There are very simple instructions provided on how to use the document. The checklist includes 56 questions in total, each "yes" to the questions in each section is tallied up to provide a score in the added to Investment Readiness Assessment Scorecard. There is a maximum possible score for each category, with a Target Score to qualify as Investment Ready. The tool allow users to identify any areas for improvement in their community.

Table 36: Investment Readiness Questions and Final Assessment Score Page





Investment Readiness Assessment Scorecard		
Sections / Categories	Category Score: Maximum Possible Score	Target Score to be Investment Ready
Section A : Knowledge		
Contacts	5	4
Land Use Planning	18	15
Engaging Your Business Community	5	3
Information Sources	2	0
TOTAL	30	22
Section B : Resources		
Industrial Land Inventory	8	6
Joint Ventures	2	1
Economic Development Capacity	4	3
TOTAL	14	10
Section C – Communications		
Community and Site Selection Profiles	12	8
Website	5	4
Other Communications Considerations	3	0
TOTAL	20	12
GRAND TOTAL	64	44

Source: Government of British Columbia website: Community Business Readiness Assessment

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[53] Government of British Columbia website: Community Business Readiness Assessment: https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/economic-development/market-and-attract/business-attraction-toolkit/investment_readiness_assessment_checklist_fillable_dec18.pdf

[54] Ibid.

Case Study: British Columbia Community Business Readiness Assessment Checklist	
Key Strategic Objectives	• To provide a simple practical tool to help communities conduct a self-assessment • To provide a clear and tested method to determine any gaps that must be addressed to be investment ready • To provide a simple system of questions that can easily be adjusted to adopt to changes in investment ready standards
Key Strategic Items to be considered by WOWC & it's members	• A simple system that can be self-administered, is easy to understand, use and update

10.2 Regional Value Proposition

Southwestern Ontario relies heavily on intraprovincial migration for its annual population growth. The natural population growth rate of births less deaths dropped from 19% of the total in 2003 to only 5% by 2019/2020. The share of new population from immigration dropped between 2003 and 2020, although the share from non-permanent residents rose sharply mainly due to the agriculture sector.

The demographic profiles of Ontario and Canada indicate there will be fewer migrants to attract from in the province or across the country. The number of people retiring from the workforce in 2020 was over 40% higher than a decade ago. The region will need to rely more on immigration in the future to achieve its population growth targets. A clear and compelling value proposition will be required to attract people from outside the country, the region and its municipalities. The following table suggests values that will appeal to the primary workforce personas identified earlier in this report.

Table 37:Primary Industries and Regional Attraction Values by Primary Personas

Primary Persona(s)		Primary Industries	Regional Attraction Value
55+ Entry-level	 	Manufacturing Agriculture	Flexible and supportive work environment Range of housing types Access to services
Entry-level Newcomers	 	Manufacturing Utilities Agriculture	Range of housing types, smaller affordable, rental Close to services
Newcomers Families Temp Seasonal	  	Professional Services Health Care	Rental and home ownership models with range of size Connections to apprenticeship and education centres with employers

Table 38: Marketing Considerations for Primary Persona(s)

55+ Workers	Marketing Considerations
 Increasing the labour force participation of older individuals[55].	• For the first time in Canada's history, there are more individuals over the age of 65 than there are children under the age of 15. • Population of over 55 is now 11 million (30% 0f population) • Women 65 and older exceed men by more than 20%
Reasons for increased labour force participation	• Improved health and life expectancy • Fewer physically demanding jobs • Later entry into workforce due to more years in school • Higher levels of education • Valuing working over retirement • Need for social interaction • Financial reasons
Challenges[56]:	• Ageism in existing workplace • Lack of education and access to training • Finding and applying for jobs • Finding a work-life balance • Health issues (theirs or as a caregiver) • Lack of workplace accommodations • Lack of incentives to work in the retirement income system
Promising Initiatives[57]:	• Multifaceted awareness campaign to address ageism while promoting the benefits of hiring older individuals • Targeted training for older individuals • Supporting initiatives for more flexible work
Value Proposition	**WOWC is selling or promoting** Gateway to the member municipalities. Connections/information regarding individual appropriate products or services WOWC Member Municipalities can offer to target sector **WOWC Member Municipality is selling/promoting: to target sector:**

[55] Government of Canada: https://www.canada.ca/en/employment-social-dev Government of Canada: https://www.canada.ca/en/employment-social-development/corporate/seniors/forum/labour-force-participation.html#h2.1

[56] Government of Canada: https://www.canada.ca/en/employment-social-dev Government of Canada: https://www.canada.ca/en/employment-social-development/corporate/seniors/forum/labour-force-participation.html#h2.1

[57] Government of Canada: https://www.canada.ca/en/employment-social-dev Government of Canada: https://www.canada.ca/en/employment-social-development/corporate/seniors/forum/labour-force-participation.html#h2.1

55+ Workers	Marketing Considerations
	• Assistance/Products/Services/Features/Benefits to target sector **The target is really looking for** • **They are really buying:** **Information/Help/Assistance** – Knowing that the Individual WOWC member Municipality understands the specific challenges, needs and desires the 55+ worker is facing. • **Because they believe in**: **Contributing -**Continuing to be a part of the workforce, to stay engaged, relevant and employed • **They have a fundamental need for**: **Remaining in, or re-entering the workforce** – to make money, be part of a community or group, to stay relevant or update work skills

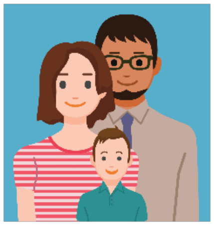
Entry Level	
 Entry level positions are typically designed for recent graduates (high school, or post-secondary).	• Typically, new entrants and young professionals with minimum work experience • Many jobs are part-time • Most do not include employee benefits
Challenges	• Growing skill requirements for entry-level positions • The pandemic has accelerated the reduction of entry level jobs[58] • The gig economy has disrupted full-time entry level jobs • Disconnect between employer expectations of academic knowledge and employee real life experience • Technically, "entry-level" does not require prior experience in the field or profession but may require on-site training BUT today's employers are requiring/expecting experience [59] • Automation and outsourcing have stripped some of the mundane entry-level tasks[60] • Disconnect between job description requirements and how applicants respond • Lack of clarity of purpose for entry-level applicant (due to fear of failure) • Employers claim they cannot find people who are dependable, trainable
Value Proposition	**WOWC product or service – You are selling/promoting to target sector:** • Gateway to the member municipalities • Connections/information regarding individual appropriate products or services WOWC Member Municipality can offer to target sector **WOWC Member Municipality product or service you are selling/promoting to target sector:** • Assistance/Products/Services to entry-level workers

[58] PCMA:https://www.pcma.org/entry-level-jobs-disappearing/

[59] Why entry level jobs aren't entry level: https://m.youtube.com/watch?v=bR2qUXmqgv4

[60] Wall Street Journal: https://www.wsj.com/articles/a-wake-up-call-for-grads-entry-level-jobs-arent-so-entry-level-any-more-11557480602?reflink=desktopwebshare_permalink

Entry Level	
	What the individual target sector **is really looking for** from WOWC Member Municipality: • **They are really buying: Possibility/opportunity** – Knowing that the individual WOWC member Municipality knows its business community and can assist with matching the right applicant to the right job, creating awareness of career paths for entry level roles • **Because they believe in**: **Themselves -**They have much to contribute if only they get a chance to prove it. • **They have a fundamental need for**: **Getting into the workforce –** To gain experience, make money, start a career

Families	
 With the increasing diversity of Canada's population, there are a variety of definitions of what constitutes a family beyond the nuclear family.	• **Family**[61] is defined as a married couple and the children, if any, of either and/or both spouses; a couple living common law and the children, if any, of either and/or both partners; or a lone parent of any marital status with at least one child living in the same dwelling and that child or those children. • All members of a particular census family live in the same dwelling. • A couple of opposite or same sex. Children by birth, marriage, common-law union, or adoption regardless of their age or marital status as long as they live in the dwelling and do not have their own married spouse, common-law partner or child living in the dwelling. • Grandchildren living with their grandparent(s) but with no parents present also constitute a census family[62]. • A growing number of Canadian families have three generations under one roof, a trend substantially linked to contemporary immigration patterns. [63]
Reasons families relocate	• To be close to family members – to support grandparents, be closer to grandchildren etc. • Job markets / Job opportunities with the right type of job • New job • Lower cost of living / lower taxes • Lower real estate prices (with more living space) • Quality of life / work balance • Available and cheaper day care options • Low crime • Good schools • Parks and recreation facilities
Challenges	• Awareness of rural communities • Expectations of comparable services to those offered in urban areas • Job mobility • Spousal employment • Housing supply and affordability • Access to childcare
Recent changes that could impact the move to a rural setting	• Pandemic has shown that that many types of work is possible remotely • Increased value given to access to nature

[61] Statistics Canada: https://www23.statcan.gc.ca/imdb/p3Var.pl?Function=Unit&Id=32746
[62] Statistics Canada: https://www23.statcan.gc.ca/imdb/p3Var.pl?Function=Unit&Id=32746
[63] Ontario Human Rights Commission: http://www.ohrc.on.ca/en/human-rights-and-family-ontario/changing-face-canadian-families

Families	
Value Proposition	**WOWC product or service – You are selling/promoting to target sector:** • Gateway to the member municipalities • Connections/information regarding individual appropriate products or services WOWC Member Municipality can offer to target sector **WOWC Member Municipality product or service you are selling/promoting to families:** Assistance/Products/Services/Features and Benefits to target sector What the individual target sector **is really looking for** from WOWC Member Municipality: • **They are really buying: Trusted help/assistance** – Knowing that the Individual WOWC member Municipality will have answers to all the questions they would have. • **Because they believe in**: **Being correctly informed** so they can make educated decisions, which will impact on each family member. • **They have a fundamental need for**: **Everyone in the family to be happy** – Every family member will have specific requirements, wants, needs.

Newcomers	Considerations
 Newcomers and immigrants[64] play a key role in making Ontario strong and prosperous through their participation in the workforce and contribution to Ontario's rich cultural diversity.	• Newcomers are needed to fill the growing number of vacant jobs across industry sectors • Newcomers are enriching Ontario's social and economic lives, enhancing Ontario's creativity, innovation, and connection to global networks [65]
Existing Ontario support programs[66]	• Newcomer settlement program • Ontario Bridge Training • Learn English or French • Global Experience Ontario • Language interpreter services • Opportunities Ontario • Ontario Skills Passport • Ontario immigration
Challenges	• Language barriers[67] (the most fundamental challenge) • Understanding how access services such as: how to obtain health care, legal advice, mental health and social services) • Unrealistic expectations[68] of immigrating/transition to Canada • Securing housing (lack of local knowledge) • Pressure to succeed • Transportation requirements (drivers license may not be valid in Canada) or understanding how public transit works • Culture shock – many nuances / expectations verses realities. (Social customs and values etc. Can contribute to social isolation and mental health issues) • Differences in communication styles

[64] Government of Ontario: https://www.ontario.ca/page/newcomers
[65] Government of Ontario: https://www.ontario.ca/page/newcomers
[66] Government of Ontario: https://www.ontario.ca/page/newcomers
[67] The top 10 Problems faced by immigrants: https://m.youtube.com/watch?v=XdxtSLn7qkQ
[68] Problems and Challenges for Newcomers to Canada, not as easy as you think : https://m.youtube.com/watch?v=kz8vkurXvBg

Newcomers	Considerations
	• Children can be assimilated into the new culture much quicker than their parents/grandparents which can cause a disconnect and cultural difference. If language is a barrier then this will also cause issues with interacting with teachers and helping with homework. • Prejudice and racism. • Finding first job (without local experience / getting recognition for existing credentials) • Mental health issue due to leaving their culture/families behind/ comfort zone.
Value Proposition	**WOWC product or service – You are selling/promoting to target sector:** • Gateway to the member municipalities • Connections/information regarding individual appropriate products or services WOWC Member Municipality can offer to newcomers **WOWC Member Municipality product or service you are selling/promoting to target sector:** • Assistance/Products/Services/Features and Benefits to newcomers What the individual target sector **is really looking for** from WOWC Member Municipality: • **They are really buying: Understanding** – Knowing that the Individual WOWC member Municipality really understand newcomer's particular challenges, • **Because they believe in**: **Wanting to succeed –** Immigration is a very big step, people do it as they believe the new opportunity is better than their present situation. • **They have a fundamental need for**: **Support** - Assimilation of the entire family into their new life is critical for success. They need help across all aspects of their lives; professional networking to help find work, connections to community social groups or networks for emotional support, understanding of how all systems work etc.

Temp and Seasonal	Considerations
 The seasonal Agricultural Workers Program (SAWP) allows employers to hire temporary foreign workers (TFW) when Canadians and permanent residents are not available.[69] Temporary workers can also be local residents employed for a season of work	• Agricultural employers can hire TFWs from participating countries for a maximum period of 8 months, between January 1 and December 15, provided they are able to offer the workers a minimum of 240 hours of work within a period of 6 weeks or less. • The TFWs hired must be citizens from participating countries • Production must be in specific commodity sectors • The activity must be related to on farm / agriculture • COVID-19 has caused disruption and changes to the existing regulations
A farm employer's perspective	• COVID -19 made decisions that were hard for employers (in 2020 more than 1.300 tested positive and three people died from COVID-19[70]) • Some see it as their way to offer humanitarian aid[71] as it is a win for the farm and the worker. • Many employers hire the same workers year over year (some for 18 consecutive years[72]), they become and are treated like family
A seasonal workers perspective	• Some recent issues around COVID-19 quarantines, and cramped living quarters • COVID-19 rules and regulations based on employer information (some felt that their civil rights had been compromised) • The income derived by working as a seasonal worker puts food on their families table, pays for school fees, and clothing. In some cases, the income has allowed for their spouse to further their post-secondary education. In another, a worker built the first ever high school in his village allowing his daughter to be the first child of his to graduate from high school. • On the whole they see that the opportunity of working in Canada is a very good thing for them

[69] Government of Canada: https://www.canada.ca/en/employment-social-development/services/foreign-workers/agricultural/seasonal-agricultural.html
[70] Coronavirus: The migrant worker crisis on Canadian farms: Global News: https://m.youtube.com/watch?v=mYBk_OCU4Ys
[71] Canadian Fruit and Vegetable growers website: hortcouncil.ca : Emotional statement about temporary foreign workers: https://m.youtube.com/watch?v=v-h8CcBru2Y
[72] Seasonal Agricultural Workers in Canada- An employee perspective: https://m.youtube.com/watch?v=oOS4A4IFCLE

Value proposition	**WOWC product or service – You are selling/promoting to temporary and seasonal workers:** • Gateway to the member municipalities • Connections/information regarding individual appropriate products or services WOWC Member Municipality can offer to temporary and seasonal workers **WOWC Member Municipality product or service you are selling/promoting to target sector:** • Assistance/Products/Services/Features and Benefits to target sector What the individual temporary/foreign worker **is really looking for** from WOWC Member Municipality: • **They are really buying: An advocate they trust –** Seasonal workers want to be sure that all the rules and regulations are correct (from their prospective and from their employers) • **Because they believe in**: **Working hard –** They know this is a very valued opportunity and do not want to be penalized or lose their spot once they are in Canada • **They have a fundamental need for**: **Money** – They have a short time to make as much money as is possible for their families back home.

KEY FINDINGS

Highlights of Findings & Issues Report

11 Summary of Key Findings

The following table provides a summary of the key themes outlined in detail in this report.

	Community Workshops
Communities across the region are reporting a mismatch between employer requirements and resident skills. Employers' expectations and workers' needs are not aligned (Low wages and high housing costs, seasonal and temporary work, full vs. part-time and working conditions) Transportation and connecting where people live and where they work is a barrier to employment Employers and communities are competing for workers Rural communities face challenges providing childcare, transportation, broadband, local training, and other services required by residents There are opportunities to promote the quality of life and relative affordability of rural communities Closer ties are needed between education providers and employers Immigration and international students are recognized as a key opportunity for expanding local workforces Private sector engagement is needed in upskilling, worker recruitment Housing demand for rental and purchase exceeds supply which has driven up prices and eroding a key benefit of rural living. High prices are excluding new entrants, immigrants and lower wage workers from living and working in some rural communities NIMBYism is a common theme for municipalities seeking to increase residential densification Workforce development priorities include: • Targeted workforce and newcomer attraction for specific skills • Awareness of employment and career opportunities • Expanding the existing workforce • Embracing equity, diversity and inclusion • Increased supply and range of housing and support for builders • Infrastructure and streamlined approvals processes • Collaboration • More nimble employers • Succession planning	

	Business Survey
Housing has the highest dissatisfaction rate of all factors (78% either somewhat or very dissatisfied) followed by availability of appropriately skilled labour (67% either somewhat or very dissatisfied). Businesses would like support raising awareness of jobs/careers among local youth and with targeted recruitment drives. Increasing rental housing was also key. Most businesses in the survey will need to broaden their recruitment efforts. Firms have already raised wages to recruit staff – nearly 60% in the survey. Not as many have changed benefits and relatively few are doing effective career planning with staff (although a larger share are considering it). Childcare is a huge issue but very few firms offer or even considering offering it	
	Strategic Sectors
Manufacturing: No other region in Canada is more reliant on manufacturing. It is the largest sector by employment by a wide margin with over 97,000 workers in 2020 (15% of the total). The sector is also facing substantial workforce demand by 2030 with nearly 30,000 required from both growth and replacement demand. **Agriculture:** A major driver of the region's rural economy it is the top employer in Elgin, Huron and Perth counties. Workforce demand will exceed 10,500 through 2030. **Health care:** The fastest growing sector in the WOWC region, it is expected to add 11,000 jobs through 2030. With replacement demand the sector will need an estimated 28,000+ workers. In the first six months of 2021, there were 5,400 unique job postings online for jobs in the home support sector and nearly 3,600 for nurses across the 15-county region.	
	People Attraction
Clear resources must be established on-line to promote and align resident attraction and employment opportunities. Targeted attraction strategies are recommended Collaboration with employers and employees on skills and career pathing Value proposition of local communities and lifestyle attributes promotion.	

Post-secondary Talent Pipeline

There are 39 public college and university campuses in the 15-county region. Overall, there were 146,600 enrolled by these campuses in 2019-2020. Total college enrolment is up 23% over the past seven years but university enrollment is up only 9%. This is below the provincial growth rates of 27% and 14% respectively.

Overall, there are 29% fewer college students and 21% fewer university students enrolled in the region compared to the province overall, relative to population size.

The region's PSE institutions are attracting more international students (up more than double) and more mature students. However, relatively few of the mature students are over the age of 50.

The WOWC region (excluding the separated cities) is highly reliant on college education. Across the region there are 176 college graduates for every 100 university graduates in the workforce. In seven counties there are more than twice as many college graduates as university graduates. Across Ontario, there are only 78 college graduates for every 100 university graduates. The differential is the same among young workers.

This even as college enrollment in the 15- county region is below average compared to the rest of Ontario.

SMEs and workforce recruitment/ development

96% of firms/businesses in the WOWC region have fewer than 50 employees.

These smaller organizations tend to have less capacity to make these changes. Most do not have dedicated human resources/recruitment managers. Many will find it hard to recruit outside the local area.

Recent survey finds nearly half struggling to recruit workers (even before the pandemic).

Government and industry groups such Chambers of Commerce are boosting their support for SME recruitment and workforce development.

Help SMEs in the WOWC region adapt and thrive in this new environment including:

- Hiring from more diverse groups. According to the report SMEs are less likely to hire persons with disabilities or immigrants.
- Integrate training and career development into employees' personal development plans.
- Adopt new approaches to training including online skills development.
- Engage new tools for recruitment. There are new technology-based tools that make it easier for SMEs including MAGNET, developed by Ryerson University and the Ontario Chamber of Commerce.

Housing Development

Lack of housing in general is a barrier to a workforce strategy

Lack of housing options and variety across the region

Strong examples of partnerships and delivery of housing options but no scale up plan or potential to translate this across communities, these are considered as one off options

Some policy innovation but no scale up or strategy for implementation

Lack of engagement in communities to support acceptance of alternative and innovative housing formats to address need

Housing industry lacks capacity in some of the fastest growing areas of the region, including access to workers

Expedited approvals models and implementation is needed

Population Growth

Ontario needs a strong and growing WOWC region. It cannot rely on growth in the GTA only to ensure the province has enough tax revenue to sustainably fund public services and infrastructure. The number of residents over the age of 75 is expected to nearly triple by 2046.

Over the past decade, the WOWC region population has grown by 10%, nearly as fast as the separated cities (12%).

The top source of population growth, by far, is net intraprovincial migration (people moving in from elsewhere in Ontario). The region still attracts relatively few immigrants. Certain areas in the region are heavily reliant on temporary foreign workers

Workforce Growth and Demand

Over the next decade, total employment across the WOWC region is expected to rise by over 51,000, a growth rate of 8%. The sectors with the fastest expected growth over this period are: Health care, construction, manufacturing, retail trade and administrative and support services.

Based on the age profile of the workforce, there could be 162,700 potentially exiting the workforce over the next decade. The sectors expecting to lose the most to retirement include retail trade, manufacturing, health care, construction, and agriculture.

Combined, workforce demand will be an estimated 213,900 (162,700 from replacement and 51,200 from growth).

Workforce Supply

There are not nearly enough young people expected to join the workforce in the next 10 years to address demand (an 84,000 'gap' that will need to be address by inward migration).

If the provincial government population growth forecasts through 2030 come to fruition, Dufferin, Wellington, Simcoe, Huron, Norfolk and Oxford will all have enough population in 2030 to have met workforce demand throughout the period. The others, based on the Ministry of Finance population projections, will not. Elgin, Chatham-Kent and Lambton are facing significant gaps of more than 10 percentage points.

Most jurisdictions in the WOWC region are attracting relatively few immigrants – 80-90% below the provincial immigration rate. This will need to change in the years ahead.

By contrast the region is home to 58% of the provincial total of temporary foreign workers. Adjusted for population size there are 11 times as many in the WOWC region than the rest of Ontario. Adjusted for population size, Southwold had the most in 2020 with 125 per 1,000 population.

The WOWC region has a higher share of older people remaining in the workforce. Across the region, 22% of everyone 65 and older works at some point during the year.

There are other segments of the labour market that could hold potential for more workforce participation including LGBTQ2+, Indigenous peoples and persons with physical or mental health disabilities.

Workforce Planning Boards

The Workforce Planning Boards all provide workforce planning services that are specific to the unique needs and goals of the districts they represent. Beyond the common activity of compiling, analyzing and disseminating labour market information, many of the boards are active in youth programming, workforce attraction and retention, encouraging greater number of trades workers, aligning local education and training and employers' needs and facilitating digital recruitment or jobs hubs. Workforce planning boards are needed partners on workforce issues and provide services far beyond those for clients with 159. The Workforce Planning Boards are already working on many of the items identified as priorities through the strategic planning process.

Marketing and Communications

The five identified personas (55+, entry level, families, newcomers and temporary/seasonal workers) have distinctly different requirements from a marketing perspective. All will need messaging to reflect their needs

In this pandemic and post-pandemic era primary marketing efforts should be digitally based. Even the 55+ persona have accelerated their knowledge and use of technology.

WOWC member municipalities have a diverse and desirable combination of assets to attract and retain people, and businesses. They require a strong marketing campaign to tell their individual stories in a consistent manner

SWOT ANALYSIS

Strengths, Weaknesses, Opportunities and Threats

12 SWOT Analysis

The SWOT analysis considers the WOWC internal strengths and weaknesses and the external opportunities and threats. The SWOT analysis on the following pages provides a review of those elements that will contribute or potentially hamper WOWC's ability to attract and retain sufficient workforce for existing and prospective businesses.

Strengths	Weaknesses
Major internal strengths that will help the region achieve its mandate	Major internal weaknesses that will challenge the region's ability to accomplish its mandate
• Track record of people staying in the workforce beyond traditional retirement age • Demonstrated ability to attract migrants from elsewhere in Ontario • Strong track record of using temporary foreign workers to meet targeted workforce demand • Significant increase in both international and mature student enrolment in post-secondary education • Increasing PSE enrolment in some health care programs and business-related programs • Housing affordability range • Quality of Life • Exodus from GTHA – Captive Market • Organization leadership - WOWC • Organizational interconnectedness and collaboration – WOWC members • The "liveability" uniqueness offered across region • An established regional effort • Strong network of stakeholders engaged in workforce development at the local level	• Relatively large number of people expected to retire in the next decade • Decrease in the relative share of the population under the age of 20 • Some mis-alignment between workforce demand and PSE supply (e.g. declining enrolment in childcare, youth services and hospitality-related programs) • Relatively limited immigration settlement and retention support capacity • Housing stock/availability • Diversity of the types of housing stock • Access to amenities and transportation • No strategic marketing plan • No Core Brand Campaign • No marketing sub brand for individual members to build up over time • Uneven approach to talent attraction and workforce development across the region

Opportunities	Threats
Major external factors that will affect the region in a positive way	Major external factors that will affect the region in a negative way
• Provincial and federal governments investing more to support workforce development • Ontario's plan to attract more immigrants • PSE eager to help address workforce supply gaps • Companies focused on fostering a more flexible workforce • Innovation opportunity for solutions – flexibility i.e. Innisfil Uber • Partnership/Private sector solutions are emerging • Housing policy/programs expedited • Demand for greater diversity in housing types will help address affordability issues • Workforce Planning Boards and CFDCs are meeting regionally and are prepared to work with WOWC • Broad social media use can help to contain regional marketing expenses • COVID-19 has driven the acceptance and adoption of digital media use and accelerated the advancement of digital technologies to enhance communications and digital experiences • The storytelling trend is easily applicable to member municipalities' individual marketing efforts and will encourage wide distribution via social media	• Increasing competition from other areas in Ontario and across Canada for intra- and interprovincial migrants as well as immigrants • Longer term immigrant retention • Changing population expectations regarding work (remote, shiftwork, entry-level, etc.) • Lack of transportation between centres for employment • Access to employment areas • Scale - Planning complete communities with small centres- access to amenities i.e. daycare, service needs • Competitive Communities, Regions, Municipalities also marketing their unique and clearly defined. livability • Adequate budget for professional marketing

STRATEGIC PRIORITIES AND NEXT STEPS

Setting the course for the Workforce Strategy

13 Strategic Priorities for Consideration

Strategic priorities are those factors that will have the most significant impact on the success of WOWC's workforce strategy. This long list of potential strategic priorities must be refined and narrowed down to a small number of core priorities that will provide a solid foundation for the development of the core goals and objectives.

Figure 39: Determining WOWC's Strategic Priorities

The following section provides a review of issues and opportunities that will inform the discussion and establishment of strategic priorities:

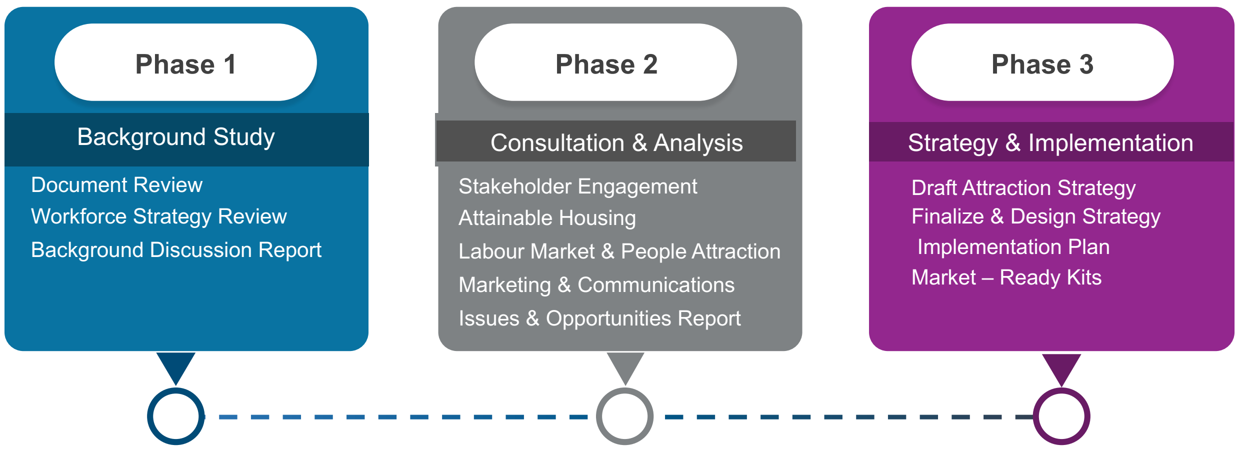
- The regional workforce is highly reliant on **college educated workers**, but the college system has relatively fewer college students compared to the rest of the province. There needs to be more external marketing/promotion of career and job opportunities in the region. Most firms/organizations have historically relied on local recruitment, particularly word-of-mouth.
- There will need to be more **promotion of job opportunities** outside the region – in Ontario, across Canada and beyond. Some of this can be done collectively to reduce the cost and administrative effort for individual smaller firms.
- Young people in the region need greater **exposure to local careers and career paths.** Even if they leave for education or a first job, they should be targets.
- Companies/organizations need to be open to **fostering a more flexible workforce.** This includes remote/hybrid working where possible, modifying shiftwork to accommodate young families, adjusting shifts/work week to accommodate older workers, and offering a broader range of non-salary benefits.

- Many companies/organizations need to do a better job of laying out the **career path for new hires.** Many of the jobs going unfilled are entry level and more work should be done to show new hires what the options are if they perform well in the jobs. In many sectors this could include owning their own business one day.
- There needs to be more **childcare support across** the region to foster more workforce participation.
- **Immigrant settlement and retention support** needs to be ramped up across the region. Urban centres/smaller communities should share resources. There may be opportunities to better leverage newcomers and provide additional support in matching and upgrading their skills to local workforce needs.
- There should be **better coordination between the post-secondary education (PSE) sector and workforce demand.** This is particularly true for strategically important sectors including agriculture, manufacturing and health care but applies to all industries. **Industry collaboration** with guidance offices would help students make informed career planning decisions.
- **PSE student housing** must be part of any overall housing strategy.
- Alignment is needed between the local workforce need and **identifying the most relevant housing format t**hat is best suitable. This can be done as part of County level strategy and supports the development industry understanding building models.
- **Model policy development for** local municipalities is an important tool that County government can promote. This can encourage community acceptance of housing alternatives and provide local communities direction for policy development and implementation.
- **Engagement with the housing industry** is important to support growth, access to resources and other tools needed to scale up and meet demand across the region.
- Housing strategy at a County level needs to include partners, incentives and community engagement as key components. **Consultation and collaboration** on opportunity and education will support uptake and is necessary to expedite an increase in housing supply.
- **Managing data** to track housing need and uptake is essential as an action to support a housing strategy. Progress must be monitored to ensure performance is being met and to identify where resources are needed and where emphasis needs to shift over time.
- The WOWC Region has many assets; geographic and nature based, existing communities and amenities, varied employment options, and entrepreneurial opportunities already in place to allow for a world class **attraction and retention marketing campaign** to be developed and marketed locally, regionally, and nationally.
- The development of the Workforce Strategy at this time provides an opportunity to look at all that the WOWC Region has to offer with fresh eyes and to **appreciate the assets.** Each WOWC member Municipality will need to showcase why they are proud to promote their individual community and the WOWC Region" to the target audiences to be successful

- WOWC will need to develop a Core Brand Campaign to **facilitate the individual member's efforts** in establishing and clearly defining their unique assets so they can customize, maintain and continue to expand from the Core Brand Campaign. WOWC should incorporate key messages and design elements into customizable materials to ensure continuity and usage.

14 Next Steps

The consulting team will review the key findings of this report with the Workforce Strategy Steering Committee on September 17, 2021. At that meeting the steering committee and consulting team will work together to establish the key priorities that will form the basis of the Workforce Strategy.



15 Table of Figures & Tables

15.1 Figures

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