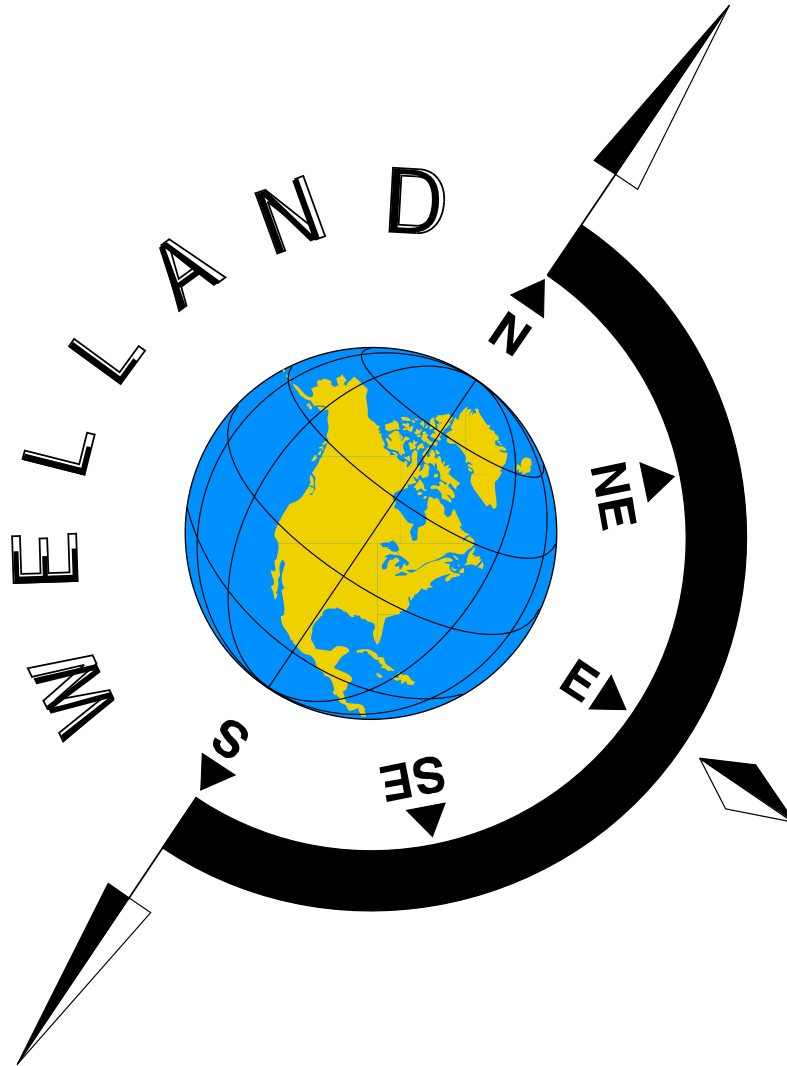


Review of Employment Trends



REVIEW OF EMPLOYMENT TRENDS
FOR
WELLAND, ONTARIO
CANADA
2010

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DISCLAIMER

The Welland Development Commission has attempted to present accurate information in this report based on data received through interviews and direct contact with local companies. Accordingly, there is no guarantee of the accuracy of the data, as the information was provided by responding organizations and is not independently verifiable.

The information presented in this report is not based upon residency of the work force; therefore, job losses or firm relocations should not necessarily be considered as losses to Welland. Due to the high mobility of the labour force in the Niagara Region, job losses or gains will also affect neighbouring municipalities. Data regarding gender of labour force participants was not collected.

CITY OF WELLAND - REVIEW OF EMPLOYMENT TRENDS 2010

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ANALYSIS AND SUMMARY

The information contained in this report is specifically for the period July 2009 to July 2010.

While the time frame of this report covers a relatively brief period, and as such cannot furnish a basis for conclusions about Welland's economic picture, it does provide some insight into possible trends.

During the period July 2009 to July 2010, Welland recorded a net loss of 10 businesses and a net loss of 421 employees.

This report includes information regarding the Non-Profit Organizations and Sports Clubs & Organizations in the City of Welland. The number of Non-Profit Organizations has decreased by 2. While there has been a decrease in firms, the overall number of employees has increased and volunteers for this sector have decreased. The number of Sports Clubs & Organizations has increased by 3 while experiencing a slight decrease in employees and no changes to the number of seasonal employees or volunteers.

The City of Welland, in 2004, completed a community economic development strategy aimed at strengthening the City's socio-economic well-being and quality of life. This strategy served as a guide for community initiatives aimed at building a more stable and diverse economic base in Welland.

The province has recently created a "Places to Grow" plan for the Golden Horseshoe and in this plan Welland is designated the "gateway economic centre". This plan describes the "gateway economic centre" as having unique economic importance to the region and Ontario due to its proximity to major international border crossings.

Welland's job forecast however does look bright as the City continues its move to a more diversified economy. The city anticipates that as these plans are implemented, employment and business in Welland will prosper.

INTRODUCTION

The purpose of this report is to provide an analysis of the employment trends in Welland. The data provided summarizes the findings gathered while updating the Welland Business Directory. This process involved the collection of employment data from individual companies in the City of Welland.

This report will examine changes in data for the 2009 and 2010 Business Directories. Changes within existing businesses, new business openings, and business closures/relocations were examined. The net change of firms and employees, comparisons of employee numbers for the largest employers in Welland, data for the largest manufacturing employers, and employment statistics for Non-Profit and Sports Clubs and Organizations are presented. This report concludes with a summary of employee totals and firm numbers for each sector in the City of Welland.

Over the course of one year, fluctuations occurred within some employment categories; however, these fluctuations are a regular occurrence and do not necessarily denote a trend.

The following chart presents the economic sectors for the 2010 Business Directory, along with their common abbreviations, which will be referred to throughout this report.

SECTORS AND ABBREVIATIONS

Sector Name	Abbreviation
Accommodation, Travel and Tourism	ACCM/TRAV
Accountants	ACCT
Amusement and Recreation	AMUS/REC
Automotive	AUTO
Call Centres	CALL CNTR
Catering and Food Services	CATER/FOOD
Commercial Printing	CMCL/PRINT
Communications	CMNC
Computer and Internet Service	CMPT/NET
Construction and Construction Equipment	CNSTR
Consultants	CNSLT
Convenience and Variety Stores	CONV/VRTY
Education Services	EDUC
Electrical	ELECT
Financial Institutions	FIN
Funeral Services	FUNRL
Government Services	GOV
Health and Social Services	HLTH
Insurance and Insurance Adjusters	INS
Interior and Exterior Design	INT/EXT DSN
Land Surveying	LND SURV
Landscaping and Gardening	LNDSCP/GARD
Legal Services	LEGAL
Manufacturing	MFG
Marketing Services	MRKT
Media	MEDIA
Non-Profit Organizations	NONPROF
Personal and Household Services	PERS/HHLD
Pharmacies	PHARM
Photography/Videography	PHOTO/VIDEO
Property Management	PROP MGMT
Real Estate	REAL EST
Retail	RTL
Security	SEC
Sports Clubs and Organizations	SPORTS
Transportation and Warehousing	TRANS/WAR
Utilities	UTL
Veterinarian Services	VET
Wholesale Trade	WHL

CHANGE IN NUMBER OF FIRMS

The economic sectors used in the 2009 and 2010 Business Directories are also used here to compare the change in number of businesses over the past year.

The City experienced 23 new business openings and 33 business closures/relocations, resulting in a net loss of 10 businesses between July 2009 and July 2010.

Table 1 illustrates the change in the number of businesses in Welland between July 2009 and July 2010. *Table 2* shows a breakdown, by sector, of the new and closed/relocated businesses.

Table 1

CHANGE IN NUMBER OF FIRMS	
Business Directory Listings – 2009	1,175
<i>New Firms:</i> July 2009 – July 2010	23
<i>Business Closures & Relocations:</i> July 2009 – July 2010	33
Business Directory Listings – 2010	1,165
Net Gain/Loss	(10)

Table 2

CHANGE IN NUMBER OF FIRMS BY SECTOR					
Sector	2009 Firms	2010 Firms	New 2010 Firms	2010 Firm Closures	Net Change Gain/(Loss)
ACCM/TRAV	17	17	0	0	0
ACCT	11	10	0	1	(1)
AMUS/REC	16	17	1	0	1
AUTO	97	98	2	1	1
CALL CNTR	5	4	0	1	(1)
CATER/FOOD	117	121	7	3	4
CMCL/PRINT	6	6	0	0	0
CMNC	8	8	0	0	0
CMPT/NET	28	28	0	0	0
CNSTR	71	70	0	1	(1)
CNSLT	22	21	1	2	(1)
CONV/VRTY	35	34	0	1	(1)
EDUC	27	28	2	1	1
ELECT	13	11	0	2	(2)
FIN	38	37	0	1	(1)
FUNRL	7	7	0	0	0
GOV	18	18	0	0	0
HLTH	101	99	0	2	(2)
INS	21	21	0	0	0
INT/EXT DSN	33	34	1	0	1
LND SURV	2	2	0	0	0
LNDSCP/GARD	17	16	0	1	(1)
LEGAL	22	22	0	0	0
MFG	54	55	1	0	1
MRKT	14	14	0	0	0
MEDIA	4	5	1	0	1
PERS/HHLD	110	110	5	5	0
PHARM	12	12	0	0	0
PHOTO/VIDEO	11	11	0	0	0
PROP MGMT	5	5	0	0	0
REAL EST	13	13	0	0	0
RTL	184	176	2	10	(8)
SEC	6	6	0	0	0
TRANS/WAR	16	15	0	1	(1)
UTL	2	2	0	0	0
VET	4	4	0	0	0
WHL	8	8	0	0	0
TOTAL	1,175	1,165	23	33	(10)

NEW BUSINESS OPENINGS

Between July 2009 and July 2010, 23 new businesses opened in the City of Welland. The Catering and Food Services sector had the greatest increase with 7 business openings while the Personal & Household Services sector also grew with a total of 5 openings.

Table 3 illustrates the sectors with new business openings.

Table 3

Sectors with New Business Openings	
Amusement & Recreation	1
Automotive	2
Catering & Food Services	7
Consultants	1
Education Services	2
Interior/Exterior Design	1
Manufacturing	1
Media	1
Personal & Household Services	5
Retail	2
TOTAL	23

BUSINESS CLOSURES/RELOCATIONS

Between July 2009 and July 2010, 33 businesses closed in the City of Welland or relocated. These closures can be attributed to bankruptcies, retirements, deaths, non-viability and other circumstances. The Retail sector was the most affected with a loss of 10 businesses since July 2009.

Table 4 illustrates sectors with business closures/relocations.

Table 4

Sectors with Business Closures	
Accountants	1
Automotive	1
Call Centres	1
Catering & Food Services	3
Construction and Construction Equipment	1
Consultants	2
Convenience & Variety Stores	1
Education	1
Electrical	2
Financial Institutions	1
Health & Social Services	2
Landscaping and Gardening	1
Personal & Household Services	5
Retail	10
Transportation and Warehousing	1
TOTAL	33

CHANGE IN EMPLOYMENT

The total number of employees in Welland businesses, as of July 2010, is 15,728 with 535 of these employees being seasonal. Within the City, some sectors experienced job gains, while others experienced job losses. In sectors with job gains, there was an overall increase of 134 jobs. In sectors with job losses, there was an overall decrease of 555 jobs. Therefore, there was a net loss of 421 jobs this year.

Table 5 of this report compares the number of employees for each sector in July 2009 and July 2010.

Table 6 and *Table 7* provide listings of the sectors that experienced net job gains and losses, respectively, during the year.

Fifteen sectors experienced net growth in their labour force, the largest increase experienced by Manufacturing with a gain of 35 employees.

Seventeen sectors experienced net losses in their labour force. The most severe loss was experienced by Call Centres with a loss of 356 jobs due to the relocation of Canadian Tire Financial Services employees as well as the closing of Marusa Marketing.

Table 5

CHANGE IN EMPLOYMENT				
Sector	Number of Employees 2009	Number of Employees 2010	Net Change 2009-2010	% Change 2009-2010
ACCM/TRAV	112	110	(2)	(1.79)
ACCT	73	71	(2)	(2.73)
AMUS/REC	109	104	(5)	(4.59)
AUTO	652	641	(11)	(1.69)
CALL CNTR	2055	1699	(356)	(17.32)
CATER/FOOD	1340	1335	(5)	(0.37)
CMCL/PRINT	29	27	(2)	(6.9)
CMNC	23	25	2	8.7
CMPT/NET	74	76	2	2.7
CNSTR	581	598	17	2.93
CNSLT	124	87	(37)	(29.84)
CONV/VRTY	120	118	(2)	(1.67)
EDUC	1621	1635	14	0.86
ELECT	56	49	(7)	(12.5)
FIN	357	353	(4)	(1.12)
FUNRL	28	28	0	0
GOV	720	729	9	1.25
HLTH	1393	1395	2	0.14
INS	140	143	3	2.14
INT/EXT DSN	132	144	12	9.1
LND SURV	15	12	(3)	(20)
LNDSCP/GARD	136	129	(7)	(5.15)
LEGAL	110	112	2	1.82
MFG	1951	1986	35	1.79
MRKT	97	99	2	2.06
MEDIA	144	96	(48)	(33.3)
PERS/HHLD	515	515	0	0
PHARM	250	274	24	9.6
PHOTO/VIDEO	24	24	0	0
PROP MGMT	87	87	0	0
REAL EST	161	168	7	4.35
RTL	2234	2231	(3)	(0.13)
SEC	182	138	(44)	(24.18)
TRANS/WAR	364	347	(17)	(4.67)
UTL	49	50	1	2.04
VET	31	33	2	6.45
WHL	60	60	0	0
TOTAL	16,149	15,728	(421)	(2.61)

Table 6

Job Gains By Sector	
Communications	2
Computer & Internet Service	2
Construction & Construction Equipment	17
Education Services	14
Government Services	9
Health & Social Services	2
Insurance & Insurance Adjusters	3
Interior & Exterior Design	12
Legal Services	2
Manufacturing	35
Marketing Services	2
Pharmacies	24
Real Estate	7
Utilities	1
Veterinarian Services	2
TOTAL	134

Table 7

Job Losses by Sector	
Accommodation, Travel and Tourism	2
Accountants	2
Amusement & Recreation	5
Automotive	11
Call Centres	356
Catering & Food Services	5
Commercial Printing	2
Consultants	37
Convenience & Variety Stores	2
Electrical	7
Financial Institutions	4
Land Surveying	3
Landscaping & Gardening	7
Media	48
Retail	3
Security	44
Transportation & Warehousing	17
TOTAL	555

WELLAND'S LARGEST EMPLOYERS

Welland's largest employers experienced a net loss of 261 employees over the past year. The major firms in Welland account for 6,110 jobs of the total employed labour force of 15,728.

Table 8 – Changes for Major Employers

Company Name	Employees 2009	Employees 2010	Change in 2009 - 2010 Employees Gain/Loss
Canadian Tire Financial Services	1,184	938	(246)
Niagara Health System – Welland Hospital Site	900	900	0
Convergys CMG Canada Ltd. Partnership	700	700	0
District School Board of Niagara	595	595	0
Niagara College of Applied Arts & Technology	526	526	0
Lakeside Steel Corporation	485	485	0
Corporation of the City of Welland	353	353	0
Wal-Mart Canada	290	290	0
Niagara Catholic District School Board	250	250	0
Henniges Automotive (Formerly GDX Automotive)	200	200	0
First Student Canada	200	200	0
Community Living – Welland/Pelham	189	174	(15)
Zehrs Food Plus	172	172	0
Bosch Rexroth Canada Corp.	167	167	0
A Child's World	160	160	0
TOTAL	6,371	6,110	(261)

WELLAND'S LARGEST MANUFACTURING EMPLOYERS

The manufacturing sector comprises a major part of Welland's economic base. This sector consists of 55 of the 1,165 total firms in the 2010 Business Directory and employs 1,986 individuals or 12.6% of the City's total workers.

During the past year there was a net gain of 35 jobs in the Manufacturing sector for Welland. Of the largest manufacturing employers, illustrated in *Table 9*, there were no major changes to report.

Table 9 – Largest Manufacturing Employers

Employer	2009	2010	% Change 2009-2010	% MFG Sector Employment	% of Total Employees
Lakeside Steel Corporation	485	485	0	24.42	3.08
Henniges Automotive (formerly GDX)	200	200	0	10.07	1.27
Bosch Rexroth Canada	167	167	0	8.41	1.06
Vesuvius Canada Inc.	110	110	0	5.54	0.7
Welland Forge Division	100	100	0	5.04	0.64
Canada Forgings Inc.	100	100	0	5.04	0.64
TOTAL	1,162	1,162	0	58.52	7.19

NON-PROFIT AND SPORTS CLUBS & ORGANIZATIONS

There are numerous Non-Profit Organizations offering their many services to the residents and visitors of the City of Welland and neighbouring communities. 81 such organizations are included in the 2010 Business Directory along with their number of employees and volunteers.

There are also a variety of Sports Clubs and Organizations located in Welland. The Business Directory includes these clubs and organizations in addition to the number of employees and volunteers involved with each listing. There are currently 38 sports clubs and organizations listed in the 2010 Business Directory.

The following table illustrates a comparison between the number of organizations, employees, seasonal employees and volunteers for the Non-Profit Organizations and Sports Clubs and Organizations sectors for 2009 and 2010.

Table 10

NON PROFIT ORGANIZATIONS AND SPORTS CLUBS & ORGANIZATIONS				
	Number of Organizations	Number of Employees (excl. Seasonal)	Number of Seasonal Employees	Number of Volunteers
NON PROFIT				
July 2009	83	684	106	3,624
July 2010	81	808	118	3,554
SPORTS				
July 2009	35	110	129	722
July 2010	38	108	129	722

SUMMARY OF FIRM AND EMPLOYEE TOTALS

As of July 2010, there are 1,165 firms open for business and a total of 15,728 employees in Welland.

Table 11

SUMMARY OF FIRM AND EMPLOYEE TOTALS				
Sector	Total Firms 2010	Full-Time Employees 2010	Part-Time Employees 2010	Seasonal Employees 2010
ACCM/TRAV	17	72	21	17
ACCT	10	47	10	14
AMUS/REC	17	53	48	3
AUTO	98	545	84	12
CALL CNTR	4	1697	2	0
CATER/FOOD	121	987	317	31
CMCL/PRINT	6	25	1	1
CMNC	8	21	4	0
CMPT/NET	28	50	16	10
CNSTR	70	499	35	64
CNSLT	21	41	15	31
CONV/VRTY	34	77	36	5
EDUC	28	1500	80	55
ELECT	11	42	6	1
FIN	37	246	105	2
FUNRL	7	14	14	0
GOV	18	647	65	17
HLTH	99	1230	163	2
INS	21	133	9	1
INT/EXT DSN	34	118	15	11
LND SURV	2	11	1	0
LNDSCP/GARD	16	53	9	67
LEGAL	22	96	13	3
MFG	55	1935	34	17
MRKT	14	88	11	0
MEDIA	5	72	22	2
PERS/HHLD	110	396	96	23
PHARM	12	186	87	1
PHOTO/VIDEO	11	14	9	1
PROP MGMT	5	56	30	1
REAL EST	13	160	7	1
RTL	176	1262	843	126
SEC	6	92	46	0
TRANS/WAR	15	129	208	10
UTL	2	45	1	4
VET	4	22	9	2
WHL	8	45	15	0
TOTAL	1,165	12,706	2,487	535