



Labour Force Survey Annual Report 2023

City of Guelph, Economic Development

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Introduction

Employment trends are one measure of the economic health of a community. Fluctuations in employment over time can indicate changes to economic growth or decline in all, or specific types of sectors. In an effort to understand employment trends in the Guelph Census Metropolitan Area (CMA), this report presents an analysis of the labour force trends, especially focusing on the characteristics of the workforce in 2023.

About the data

The data and insights are derived from the Labour Force Survey conducted monthly by Statistics Canada. The survey provides insight into the employment landscape (supply side), workforce participation, unemployment rates, and other indicators to understand the labour market shifts within the Guelph CMA.

Vicinity Jobs provides insights into the trend of job postings in the Guelph region throughout the year (demand side), shedding light on the skills that are in high demand locally.

Geography

Statistics Canada: The report looks at data at the Census Metropolitan Area (CMA) level. Guelph, CMA consists of

- Guelph, City [Census subdivision]
- Guelph/Eramosa, Township [Census subdivision]
- Puslinch, Township [Census subdivision]

Vicinity Jobs: Job postings with location as Guelph is tracked for 2023.

Key insights

1. In November and December 2023, Guelph CMA's participation and employment rates ranked highest in Canada. Entering 2024, a higher percentage of Guelph's abled population is willing to work compared to all other CMAs in the country. Additionally, a higher percentage of residents seeking employment are able to find work in the Guelph CMA compared to all other CMAs in the country.
2. Comparing December 2022 to December 2023, the participation rate and employment rate for Ontario and Canada remained stable, while Guelph CMA showed an increase of 3.7 per cent and 2.7 per cent, respectively.
3. Labour force participation in Guelph CMA was at the all-time highest in June 2023 topping out at 107,900 residents.

4. Total employment in Guelph CMA has increased by 2.9 per cent in 2023 when compared with last year.
5. In December 2023, the female unemployment rate in Guelph CMA was 5.4 per cent which is higher than the male unemployment rate of 3.3 per cent.
6. Top growing industries in Guelph CMA 2023:
 - a) Transportation and warehousing
 - b) professional, scientific and technical services
 - c) public administration
 - d) healthcare and social assistance
 - e) business, building and other support services
7. Top growing occupations in Guelph CMA 2023:
 - f) education, law and government services
 - g) natural and applied sciences
 - h) trades, transport and equipment operators
 - i) management
 - j) art, culture, recreation and sport
8. Top social skills mentioned in job postings for Guelph:
 - k) teamwork
 - l) communication skills
 - m) flexibility and
 - n) leadership skills
9. Top technical skills mentioned in job postings for Guelph:
 - o) Microsoft Office
 - p) records management
 - q) analytical skills
 - r) forklift operation

Key insights can be found in the Labour Force Snapshot.

Working age population

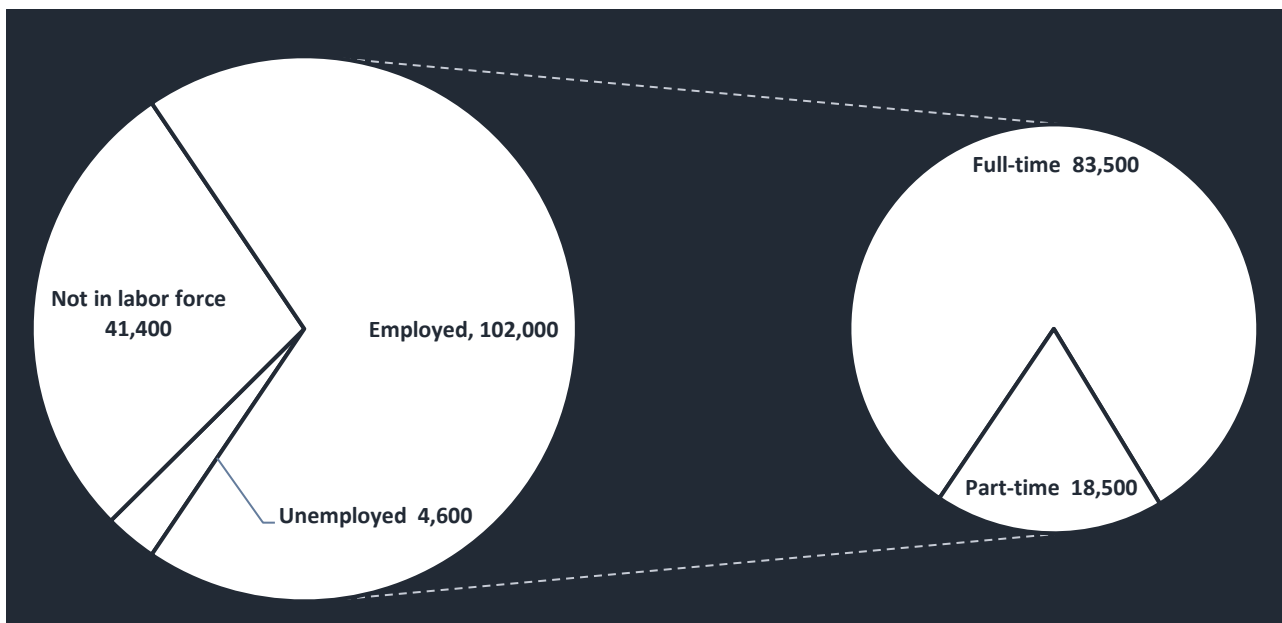
December 2023

As shown in Figure 1 the working-age population of Guelph CMA, comprising individuals aged 15 years and over, is estimated at 148,000 as of December 2023. Among them, 106,600 individuals actively participate in the labour force, encompassing both those employed and those in search of employment.

Of this labour force, 102,000 individuals are gainfully employed, with 83,500 having full-time jobs and 18,500 having part-time work opportunities. During the reference week, the number of individuals who had looked for work in the past four weeks but were without work was 4,600.

The remaining segment of the working-age population, comprising 41,400 individuals, is categorized as not part of the labour force. This classification commonly includes students, retirees, or individuals not actively seeking employment. Among those not seeking employment, some may be on unpaid leave, face permanent work incapacity, or have refrained from job seeking for a minimum of four weeks.

Figure 1: Working age population of Guelph, December 2023



Source: Statistics Canada. [Table 14-10-0378-01 Labour force characteristics, three-month moving average, unadjusted for seasonality](#)

Comparator labour market data

Guelph CMA in the provincial and national context

As shown in Table 2, in 2023, Guelph CMA has a significantly higher average participation rate and employment rate as compared to the national and provincial average rates for the year. The annual unemployment rate in Guelph CMA also remains lower than in Ontario and Canada.

Table 1: Labour force characteristics, annual average 2023

Geography	Unemployment rate	Participation rate	Employment rate
Guelph CMA	4.7%	71.9%	68.9%
Ontario	5.7%	65.5%	61.8%
Canada	5.4%	65.6%	62.1%

Source: Statistics Canada. [Table 14-10-0385-01 Labour force characteristics, annual](#) and [Table 14-10-0393-01 Labour force characteristics, annual](#)

Average annual five-year trend

As shown in figure 2, over the past five years, Guelph CMA has consistently held a lower annual average unemployment rate than Ontario and Canada, even during the challenges with the onset of the pandemic in 2020. Guelph CMA also had a noticeably higher average participation rate. In 2019, Ontario and Canada had participation rates of 65.3 per cent and 66.1 per cent, respectively, comparable to or lower than the 2023 levels. However, Guelph CMA recorded a 69.7 per cent participation rate in 2019, showing an increase of nearly 2 per cent by 2023.

Figure 2: Five-year average unemployment rate, Guelph CMA, Ontario, Canada

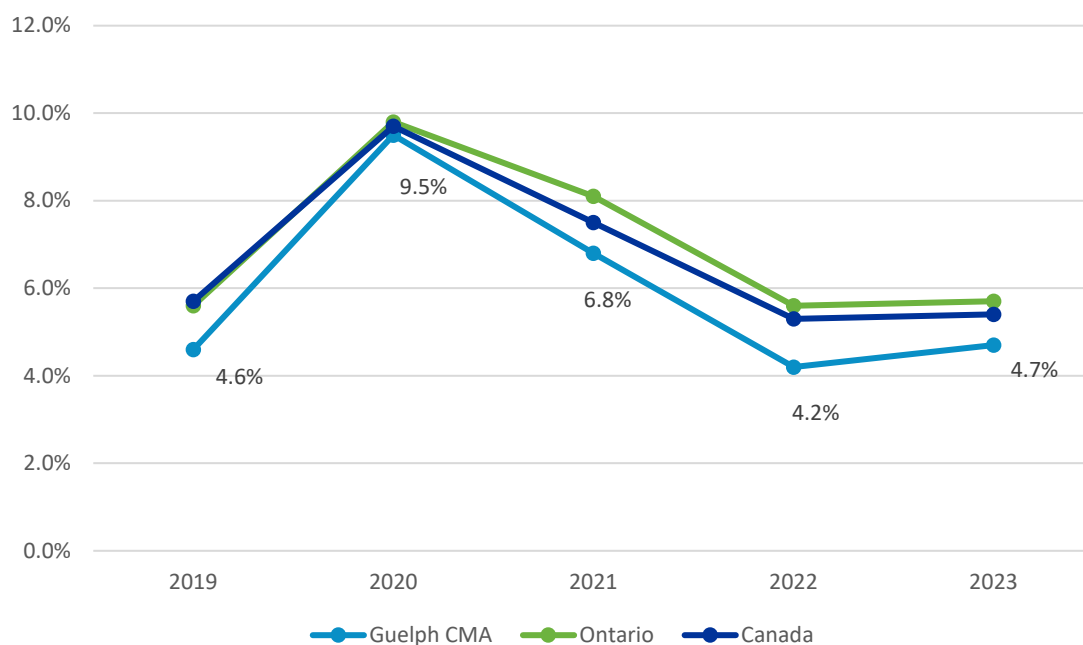
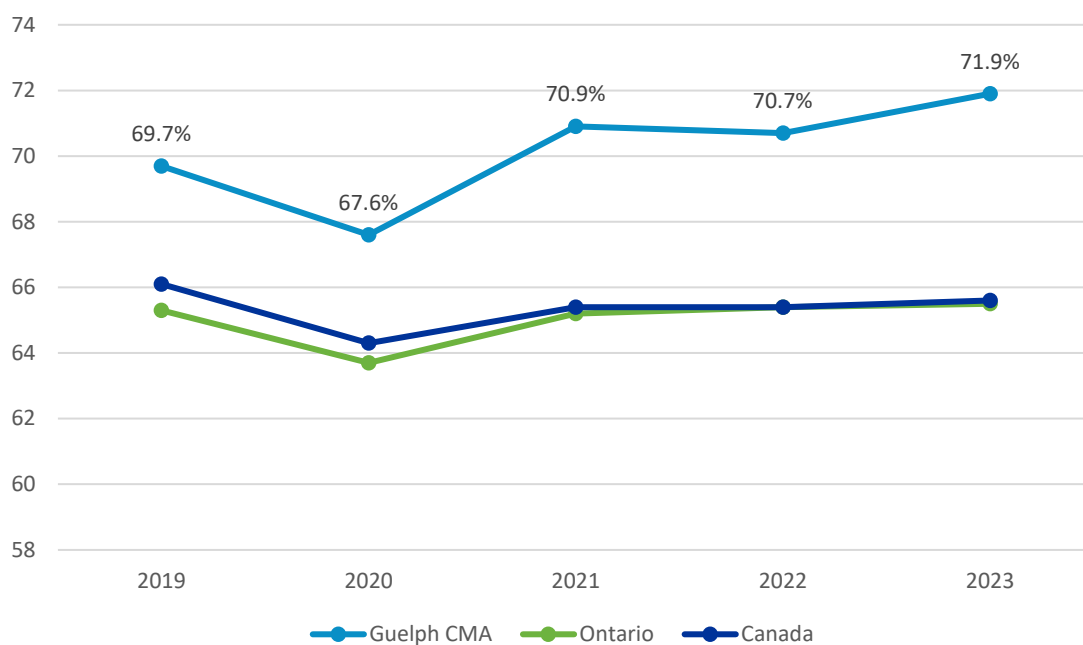


Figure 3: Five-year average participation rate, Guelph CMA, Ontario, Canada



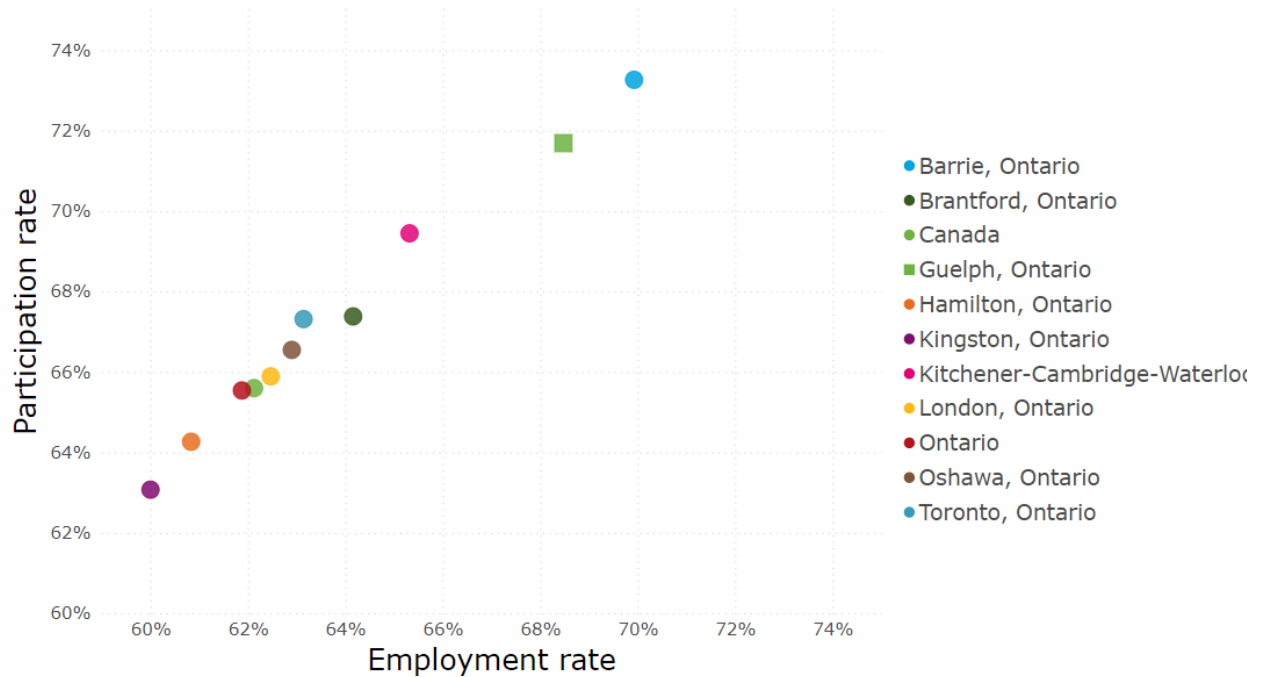
Source: Statistics Canada. [Table 14-10-0385-01 Labour force characteristics, annual](#)
[Table 14-10-0393-01 Labour force characteristics, annual](#)

Guelph CMA compared to other Ontario CMAs

As shown in Figure 4, Guelph CMA surpasses many comparator CMAs across Ontario.

A high participation rate and high employment rate indicate a well-performing labour force where a high percentage of abled residents (above 15 years of age) are looking for work and are able to find jobs.

Figure 4: Average labour force participation and employment rate for selected Ontario CMAs, 2023



Source: Statistics Canada. [Table14-10-0385-01 Labour force characteristics, annual](#)

Table 3 shows Guelph CMA’s labour force characteristics alongside comparator communities.

Table 2: Average labour force characteristics for Ontario CMAs, 2023

Geography	Participation rate	Employment rate	Unemployment rate
Kingston, Ontario	63.2%	60.2%	4.7%
Oshawa, Ontario	66.4%	62.6%	5.7%
Toronto, Ontario	67.3%	63.1%	6.3%
Hamilton, Ontario	64.1%	60.6%	5.5%
Kitchener-Cambridge-Waterloo, Ontario	69.6%	65.4%	6.0%
Brantford, Ontario	67.1%	64.0%	4.6%
Guelph, Ontario	71.9%	68.6%	4.7%
London, Ontario	66.1%	62.7%	5.3%
Barrie, Ontario	72.6%	69.1%	4.9%

Source: Statistics Canada. [Table14-10-0385-01 Labour force characteristics, annual](#)

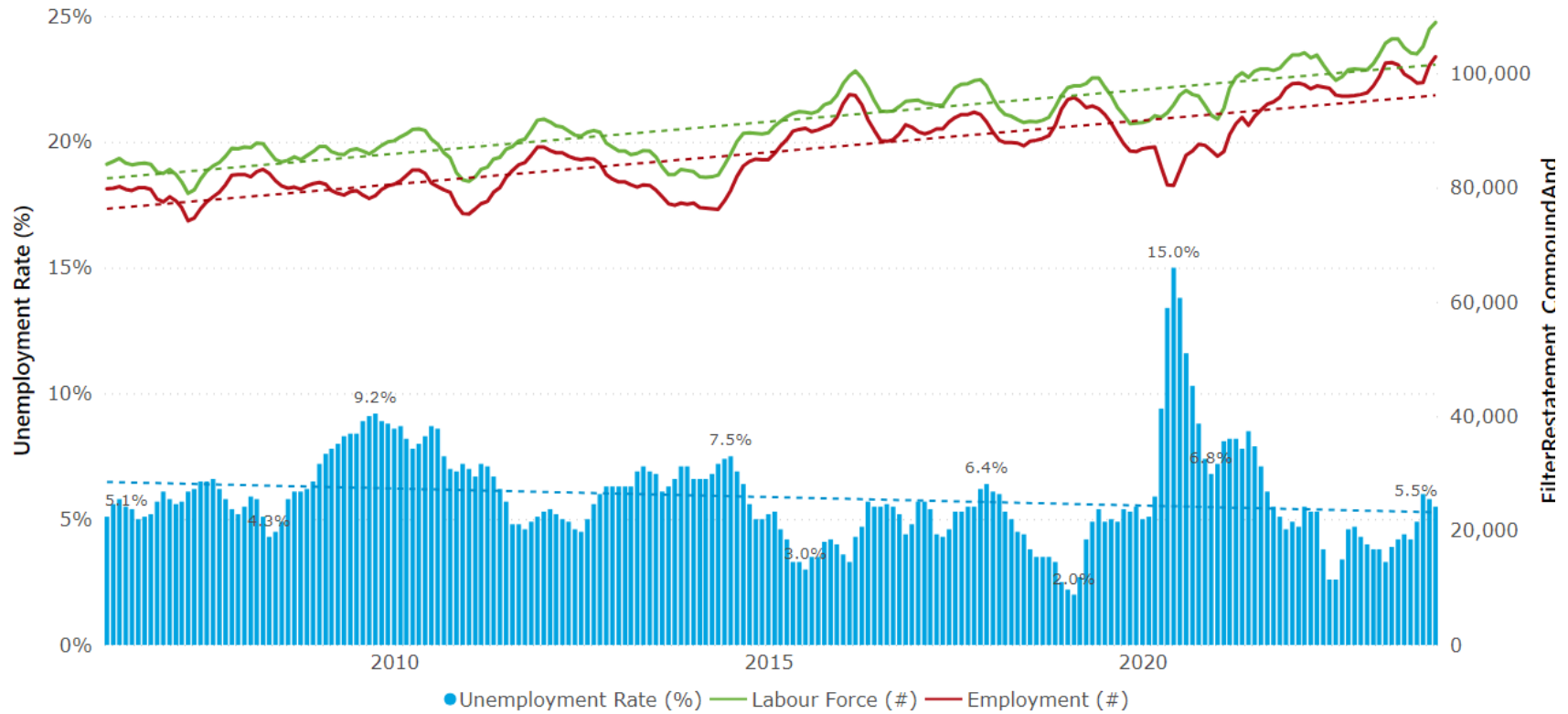
Long-run labour market trends (2006-2023)

Figure 5 displays the figures and trendlines of labour market indicators. Participation, employment, and unemployment rates can fluctuate due to positive or negative economic shocks, and various stages of economic cycles make it necessary to examine trends rather than a point in time.

The trend shows an increase in the labour force and employment in Guelph CMA since 2006; these figures will be at their highest historical levels in 2023. It also shows a decrease in the unemployment rates over the same time. High unemployment rates were observed during the onset of the pandemic in 2020, but the recovery is evident in the consecutive years, showing a downward trend for the unemployment rate over time.

Figure 5: Labour force, employment and unemployment rate, Guelph CMA, three-month moving average, seasonally adjusted, 2006-2023

Guelph CMA: Unemployment Rate, Labour Force, and Employment by Month



Source: Statistics Canada. [Table14-10-0380-01 Labour force characteristics, three-month moving average, seasonally adjusted](#)

Employment by occupation

In the Guelph CMA, sales and services occupations claimed the highest average annual employment, contributing to 18,440 jobs. However, this field has experienced a decline of 13 per cent, losing 2,860 jobs from 2022.

Trades, transport, and equipment operators, along with related positions, emerge as significant contributors, yielding 14,030 jobs. This category has seen a rise of 13 per cent, adding 1,630 jobs from 2022.

Another major contributor to employment is occupations in education, law and social, community and government services, with 13,820 jobs, which showed a substantial rise in average employment of 25 per cent, adding 2,760 jobs from 2022.

Roles in manufacturing and utilities have exhibited a decline of 14 per cent, losing 1,470 jobs, resulting in a total average employment figure in 2023 of 8,780.

In contrast, the average annual employment within art, culture, recreation, and sport is one of the lowest contributors, yet it has shown a growth of 9.7 per cent, adding 320 jobs compared to 2022.

Table 3: Average employment by occupation, 2023

Occupation	2023	Share	Year-over-year change
Business, finance and administration	13,030	13.1%	3.9%
Health occupations	6,330	6.3%	-6.5%
Management occupations	10,100	10.1%	12.1%
Natural and applied sciences and related occupations	10,860	10.9%	16.2%
Occupations in art, culture, recreation and sport	3,580	3.6%	9.7%
Occupations in education, law and social, community and government services	13,820	13.8%	24.9%
Occupations in manufacturing and utilities	8,780	8.8%	-14.3%
Sales and service occupations	18,440	18.5%	-13.4%
Trades, transport and equipment operators and related occupations	14,030	14.1%	13.1%
Total all occupations	99,800	100%	2.9%

Source: Statistics Canada. [Table 14-10-0430-01 Employment by occupation, census metropolitan areas, three-month moving average, unadjusted for seasonality](#)

Employment by industry

The goods-producing sector contributes to 24 per cent of employment, with 23,970 jobs within the Guelph CMA. Manufacturing is the principal driver of average annual employment within this goods-producing sector, accounting for an estimated 16,450 jobs. There has been a slight increase in the average annual employment in the construction sector but the decline in the goods-producing sector over a year is due to a 6 per cent fall in average annual employment in the manufacturing sector.

Table 4: Employment by Goods-producing sector, 2023

Industry	2023	Share	Year-over-year change
Construction	5,890	24.6%	1.6%
Manufacturing	16,450	68.6%	-8.6%
Other	1,630	6.8%	0.01%
Goods-producing sector	23,970	24%	-5.7%

Source: Statistics Canada. [Table 14-10-0379-01 Employment by industry, three-month moving average, unadjusted for seasonality \(x 1,000\)](#)

Table 5: Employment by Services-producing sector, 2023

Industry	2023	Share	Year-over-year change
Accommodation and food services	4,460	5.9%	3.1%
Business, building and other support services	2,850	3.8%	13.3%
Educational services	9,490	12.5%	-14.9%
Finance, insurance, real estate, rental and leasing	5,160	6.8%	1.3%
Health care and social assistance	11,150	14.7%	17.3%
Information, culture and recreation	3,750	4.9%	8.2%
Other services (except public administration)	3,170	4.2%	-17.9%
Professional, scientific and technical services	13,170	17.4%	22.2%
Public administration	4,470	5.9%	18.0%
Transportation and warehousing	5,480	7.2%	61.3%
Wholesale and retail trade	12,680	16.7%	-7.4%
Service-producing sector	75,830	76.0%	5.9%

Source: Statistics Canada. [Table 14-10-0379-01 Employment by industry, three-month moving average, unadjusted for seasonality \(x 1,000\)](#)

The service-producing sector accounts for the majority of Guelph CMA's average annual employment with 75,830 jobs. This sector saw an increase of 5.9 per cent, 4,240 jobs from 2022.

The professional, scientific, and technical services sector is the largest contributor to the service-producing sector at 13,170 jobs and has demonstrated substantial growth in employment of 22 per cent, adding 2,400 jobs since 2022.

Transportation and warehousing sector employment has shown the highest growth rate since 2022 of 61 per cent, equalling 2,080 jobs.

The healthcare and social assistance sector emerges as the fourth-largest generator of employment, contributing to 11,150 jobs. This sector has also exhibited growth in employment by 17 per cent adding 1,640 jobs from 2022.

Alternatively, those sectors that saw a decline included wholesale and retail trade, which experienced a decline of 7.4 per cent, losing 1,020 jobs compared to 2022. Despite the decline, wholesale and retail trade continues to be one of the major contributors to employment in the service-producing sector.

Educational services, with an average employment of 12.5 per cent, also show a drop of 14.9 per cent, losing 1,660 jobs since 2022.

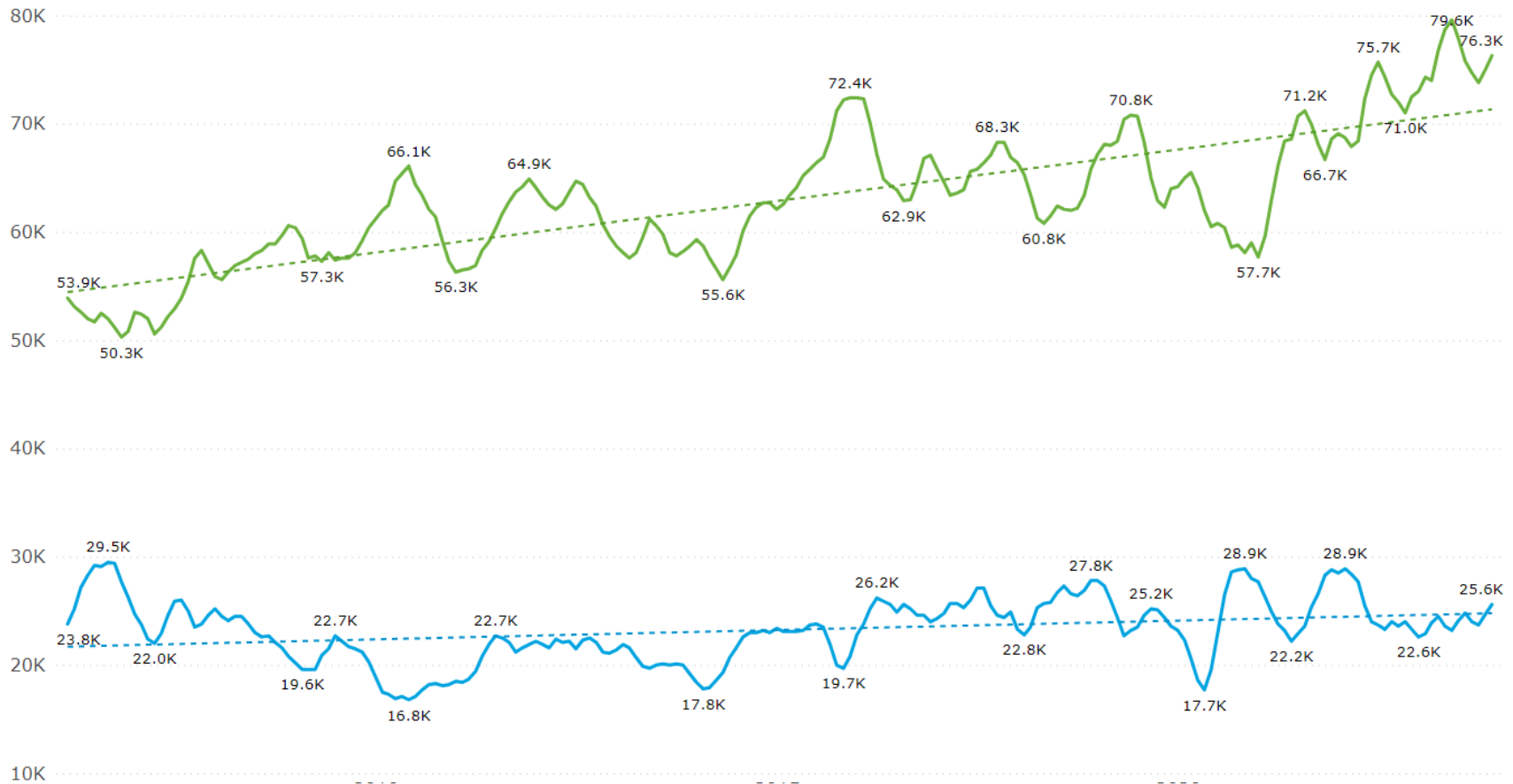
Cumulatively, total employment across both goods-producing and service-producing sectors has improved by 2.6 per cent compared to last year.

Long-term employment trends

Figure 6 shows the long-term trends of the goods-producing sector and service-producing sectors.

From March 2006 to December 2023, the service-producing sector has shown an upward trend, reaching an all-time high employment of 79,600 in June 2023. In contrast, the goods-producing sector has displayed fluctuations, returning to a pre-pandemic state, with limited growth over time.

Figure 6: Average employment in goods and service-producing sectors over time, Guelph CMA, 2006-2023



Source: Statistics Canada. [Table 14-10-0379-01 Employment by industry, three-month moving average, unadjusted for seasonality \(x 1,000\)](#)

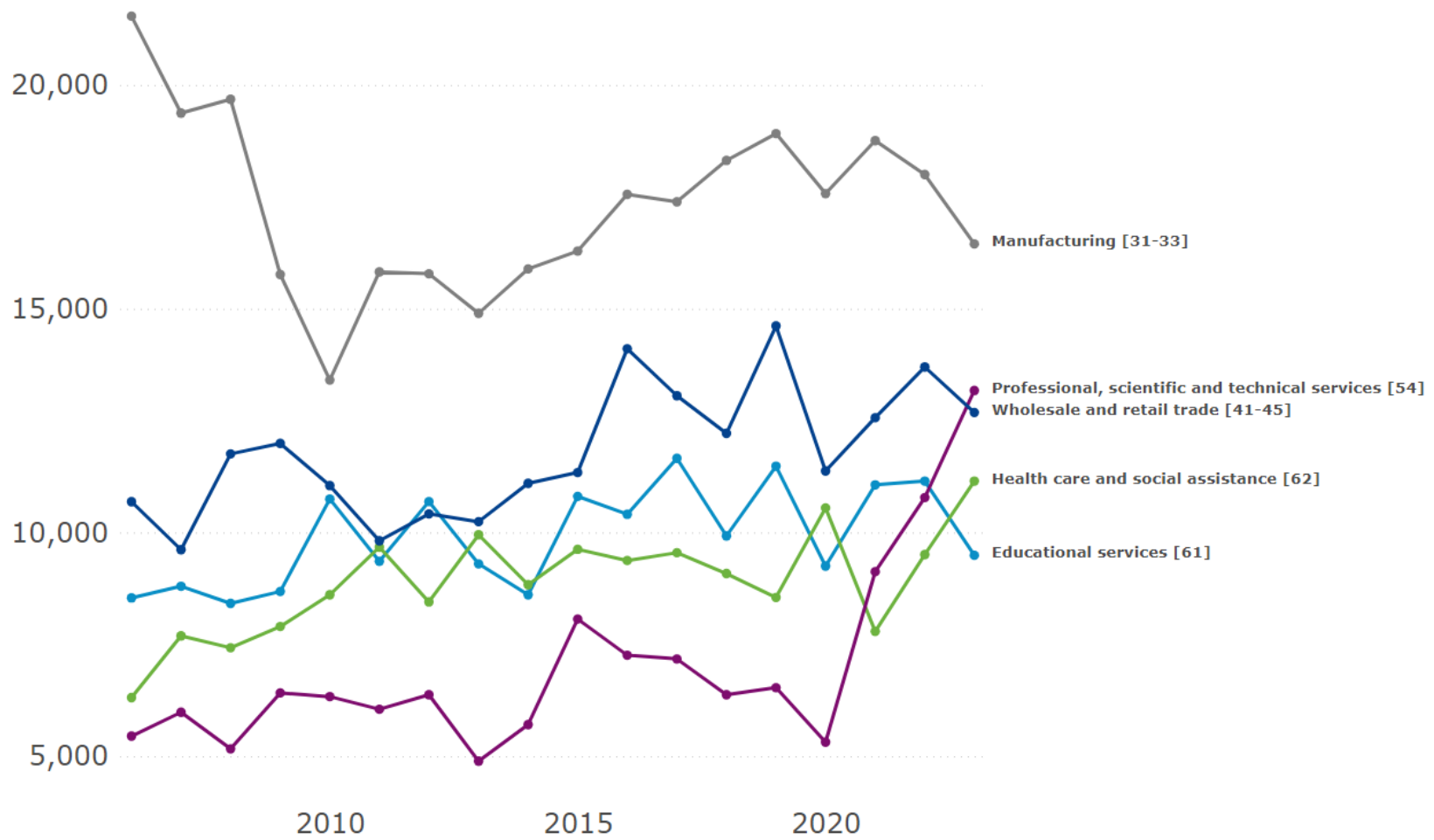
Growth of major industries in Guelph over time

For an extended period, the manufacturing sector has been the primary source of employment in the Guelph CMA. Beginning with a workforce of over 21,000 individuals in 2006, this sector has undergone a decline over time sitting at 16,450 positions in 2023. This being a decrease of 21.6 per cent since 2006. Concurrently, employment in other sectors has witnessed an upward trend, propelled by the shift from the goods-producing sector to the service-producing domains.

One standout in terms of rapid employment growth is the professional, scientific, and technical services industry. Starting with 5,450 jobs in 2006, this sector has expanded to average employment of 13,175 positions in 2023, marking a 141 per cent increase. Although a significant dip was noted in this sector's employment during the onset of COVID-19 in 2020, it has demonstrated exceptional growth over the past three years.

Amidst this sectoral evolution, wholesale and retail trade have increased their employment by 1,990 since 2006. Likewise, educational services and health care and social assistance have endured periods of fluctuation, yet both industries have exhibited growth since 2006, collectively contributing 950 and 4,840 more jobs.

Figure 7: Average employment by major industries, Guelph CMA, 2006-2023



Source: Statistics Canada. [Table 14-10-0379-01 Employment by industry, three-month moving average, unadjusted for seasonality \(x 1,000\)](#)

Job postings data for 2023

This section analyzes job market data through vicinity jobs, a platform that provides real-time labour market information through job postings big data. Looking at job posting trends provides us an indication of the types and volume of jobs that employers are looking to fill locally. This data is also helpful to understand the top skills in demand by employers.

Wages and postings by occupation

As shown in Table 6, the average wage listed on job postings in 2023 was \$26.26 per hour for the Guelph CMA. Based on the National Occupation Classification system, 58 management level jobs are posted with an average salary of \$64.38 per hour and sales and service occupations with the lowest average wages of \$21.07 per hour.

While sales and service occupations have the lowest wages, it is also received the most postings in 2023 at just over 3,750. Business, finance and administration related jobs had the second highest with 2,049 postings, followed by trades, transport and equipment operator related occupations with 1,845 postings.

Table 6: Total job postings by occupation, average wages (per hour), Guelph, 2023

Occupation	Postings	Average wage
Sales and service occupations	3,756	\$21.07
Business, finance and administration occupations	2,049	\$27.34
Trades, transport and equipment operators and related occupations	1,845	\$25.03
Health occupations	775	\$27.49
Occupations in education, law and social, community and government	663	\$25.32
Natural and applied sciences and related occupations	383	\$34.53
Occupations in manufacturing and utilities	383	\$23.32
Occupation in art, culture, recreation and sport	148	\$25.30
Legislative and senior management occupations	58	\$64.38
Natural resources, agriculture and related production occupations	57	\$25.62
Other/Unidentified	2,367	n/a
Total	12,484	\$26.26

Source: Vicinity Jobs, Guelph, Ontario, 2023

Educational requirements

About 16 per cent or 1,961 of the job postings require at least high school completion. Almost half of the job postings require an undergraduate degree (bachelor's) or less in educational requirements.

Only 0.5 per cent of postings (66) are posted for a post graduate degree or doctoral degree and 111 jobs are posted with a Masters degree requirement.

Many job postings have not mentioned or do not require any educational requirements. This could be due to the methods used to detect educational requirements, mostly keywords are used to analyze the level of education required for a position. In certification-based jobs, only certificates are mentioned instead of a degree requirement or in some cases education is implied and not mentioned in the job posting.

Table 7: Total job postings by educational requirements, Guelph, 2023

Requirements	Postings	Share
High School Completion	1,961	15.7%
College Diploma or Certification	2,943	23.6%
Undergraduate Degree (Bachelors)	954	7.6%
Graduate Degree - Masters	111	0.9%
Post-Graduate Degree - Doctorate	66	0.5%
No Education required	246	2.0%
Not Identified	6,203	49.7%
Total	12,484	100%

Source: Vicinity Jobs, Guelph, Ontario, 2023

Wages and postings by industry

As shown in Table 9, based on the North American Industry Classification System (Canada), the highest paying job postings are through the public administration industry, with an average wage of \$36.83 per hour.

The lowest-paying job postings are in the accommodation and food services industry, with an average wage of \$18.64 per hour. Another sector to note is manufacturing, with 495 job postings in the middle and an average wage of \$27.19 per hour.

The highest number of postings was in the retail industry, with 1,151 in 2023. Healthcare and social assistance has more than one thousand job postings in line with the Labour Force Survey stating the growth in the sector's employment.

Table 8: Total job postings by industry with average wages per hour, Guelph, 2023

Industry	Postings	Average wage
Agriculture, forestry, fishing and hunting	23	\$25.00
Mining and oil and gas extraction	3	\$21.00
Utilities	17	n/a
Construction	68	\$28.59
Manufacturing	495	\$27.19
Wholesale trade	478	\$23.60
Retail trade	1,151	\$19.91
Transportation and warehousing	241	\$26.82
Information and cultural industries	100	\$26.64
Finance and insurance	270	\$28.96
Real estate and rental and leasing	95	\$22.72
Professional, scientific and technical services	297	\$27.81
Administrative support, waste management services	128	\$20.53
Educational services	709	\$29.90
Health care and social assistance	1,007	\$26.86
Arts, entertainment and recreation	76	\$30.01
Accommodation and food services	511	\$18.64
Other services (except Public Administration)	66	\$20.47
Public administration	351	\$36.83
Unidentified	6,369	n/a
Total	12,369	\$26.26

Source: Vicinity Jobs, Guelph, Ontario, 2023

Terms and definitions

Employed: Out of the population of 15 years of age and over, abled individuals who are looking for work and can find jobs.

Employment rate:(employment/population ratio) Number of employed persons expressed as a percentage of the population 15 years of age and over. The employment rate for a particular group (age, sex, marital status, province, etc.) is the number employed in that group expressed as a percentage of the population for that group.

Labour force: Civilian non-institutional population 15 years of age and over who were employed or unemployed during the survey reference week.

Participation rate: Total labour force expressed as a percentage of the population aged 15 years and over. The participation rate for a particular group (for example, women aged 25 years and over) is the labour force expressed as a percentage of the population for that group.

Seasonal adjustment: Seasonal movements are defined as those caused by regular annual events such as climate, holidays, vacation periods, and cycles related to crops, production, and retail sales associated with Christmas and Easter. Any predictable fluctuation or pattern that recurs or repeats over a one-year period is removed through a statistical method of seasonal adjustment to analyze the net trends in data.

Three-month moving average: In time series data, a three-month moving average is the average value of the three months leading up to and including a certain month. As labour force data fluctuates over months to smoothen these fluctuations, the three-month average method is used for analysis.

Unemployed: Out of the population of 15 years of age and over, abled individuals looking for work and are not able to find jobs for a minimum of four weeks.

Unemployment rate: Number of unemployed persons expressed as a percentage of the labour force.