# LOCAL LABOUR MARKET PLAN

2017 - 2018

Sudbury & Manitoulin
Workforce Planning
Planification en main-d'oeuvre

LABOUR

RESEARCH

LOOKING AHEAD TO THE FUTURE

EQUITY

BUSINESS

PARTNERSHIP

EDUCATION
TRAINING • JOBS

# Local Labour Market Plan

## 2017 - 2018

## MISSION STATEMENT

To coordinate identified education and training needs in order to generate opportunities for economic growth in the communities we serve.

## MANDATE

The Board is active in the following labour market-related areas: labour market information and research; analysis and advice; planning; access and equity; and lifelong learning.

***Workforce Planning for Sudbury & Manitoulin (WPSM)*** is one of twenty-six (26) local planning boards in Ontario, 8 of whom are pilot-test sites for Local Employment Planning Councils (LEPCs). Our mandate is to engage key partners across the Sudbury and Manitoulin Districts to address local labour market issues. Given our unique and neutral role, we bridge various labour market partners such as: business; labour; Employment Ontario (EO) service providers; educators/trainers; economic development organizations; and others to identify and address current and projected workforce issues. This report, the Local Labour Market Plan (LLMP) 2017-18, provides a foundation on which to build. It provides evidence-based research, corroborated by information from key stakeholders...all of which contributes to informed planning, decision-making, partnerships, and action.

For more information please go to: www.planningourworkforce.ca
or contact info@planningourworkforce.ca

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# Shifts in the Labour Market

Time and time again, we are asked by parents, educators, job-seekers, economic development organizations, employment services and others, where are the jobs? In reality, the question implies now and into the future.

No one has a crystal ball to accurately predict what jobs are projected to grow, and it has been said that many of the jobs that exist today, will likely not exist 10 years from now.

What we can say with a greater degree of certainty is where we are at right now, where we have been and what trends are emerging. This is where labour market information, better known as LMI, comes in. LMI provides the foundation for making more informed decisions when it comes to understanding and training our workforce. LMI includes information on the size/growth of local businesses, number of businesses by industry, employment by industry, occupations people work in and how these indicators change over time.

For this report, in addition to Statistics Canada data, we have also included the latest Census data which examines demographic trends such as population, gender, location people work and educational attainment over a five-year period. This is supplemented by some of our own research using online job vacancy postings, employer surveys, consultations, and reports on current and emerging issues in various industries such as the skilled trades, construction, health, IT (Information Technology), agriculture, and others.

It's also important for us to read other signals; for example, the direction government is pursuing and where funding is available. Last year funding was directed at:

- the Ontario Centre for Workforce Innovation (OCWI) and their call for research proposals to help identify tools and promising practices to support Employment Ontario's (EO) Employment Services;
- provincial consultations on modernizing the apprenticeship system hosted by MAESD (Ministry of Advanced Education and Skills Development);
- new employer incentives for hiring apprentices, hiring youth and upskilling the workforce;
- proposals (from MAESD) to connect training with industry need: i.e. the Sector Partnership Planning Grant; the Low Carbon Building Skills Grant; and the Skills Catalyst Fund;
- promoting experiential learning (Career Ready Fund and funds to hire Experiential Learning Coordinators for each School Board);
- the extension of the Local Employment Planning Councils (LEPCs) pilot project in 8 Ontario communities to support locally-driven workforce initiatives; and
- support for innovation, technology, research and entrepreneurship (from both the provincial and federal levels).

What do all of these activities signal? To Workforce Planning for Sudbury & Manitoulin, it signals that there is increased interest by government at all levels and others, such as industry, employers, labour, education, training, and employment to better understand what is happening in the labour market.

Although we are still out of step with aligning education and skills development with industry demand and needs, we are moving closer, but it is difficult to keep up with the changes happening across all industries. We witness it everyday with automation and technologies that disrupt and change the world around us, including the world of work. Smart phones, touch screen computers, 3-D printers, online shopping, self-driving cars, self checkouts at grocery stores - all of these changes impact on our workforce; from fewer entry-level jobs to an increase in jobs requiring highly specialized IT skills.

All of these shifts and changes are sending a strong message; that we need to keep training, education and skills development in step with where jobs are now and what jobs will exist in the future. This needs to be done without a crystal ball. What we can do is keep abreast of emerging trends through LMI, continue consultations with key stakeholders, and forge ahead with commitments to work together to build a strong, resilient and skilled workforce; one that can take us into the future.

# About this Report

## OVERVIEW

Workforce planning boards across Ontario (including Workforce Planning for Sudbury & Manitoulin - WPSM) help identify labour market changes, trends and issues that impact on their local economies. In order to do this, various Labour Market Indicators (LMI) from Statistics Canada are used. This year, data from the 2016 Census is also available and will provide an added perspective on changes since 2011.

In this report, LMI data for the three WPSM Board census areas has been separated into distinct sections as the issues affecting each census area are unique. Where possible, data has been supplemented by key stakeholder meetings and local consultations.

## DEMAND SIDE

As part of this overview, to provide a context for the ***demand side*** of the labour market, notable industry changes and employment trends are highlighted, along with emerging workforce themes that continue to require our individual and collective attention. Some of this is supplemented by information from the *2017 employerone survey* which continues to provide valuable insights into workforce challenges that employers are experiencing. Other data is gleaned from our quarterly Online Job Vacancy reports. Data and ongoing research in industry-specific sectors is also highlighted.

## SUPPLY SIDE

Employment Ontario (EO) which is funded by the Ministry of Advanced Education and Skills Development (MAESD) collects data to understand the ***supply side*** of the labour market; in other words, who is looking for work, training, and/or employment assistance. This data helps provide insights into those who are available for work and some of the challenges being experienced trying to match job-seekers with industry needs.

EO data includes information on clients who use: Employment Services; Literacy and Basic Skills; Second Career; and/or Apprenticeships. EO Service Providers were consulted on: needs, gaps, training and education, opportunities to improve service, emerging trends, geographic challenges and other barriers.

## ACTIONS

Last, this report provides a brief update on some of the actions being undertaken by WPSM to support various labour market initiatives across our Board area. While WPSM may not have a lead role on some of these initiatives (like ministry approved partnerships), WPSM continues to provide local support, guidance, and expertise where appropriate.

**WPSM BOARD AREA**
Greater Sudbury
District of Manitoulin
District of Sudbury

New information on changes in various industries and labour market indicators for each census area is provided where available.

Last year, labour market data from the 2016 Census and changes since 2011 was released and is included in this report.

***Employment Ontario (EO)*** data is presented in aggregate form for the WPSM Board area to ensure privacy.

Insights into local data are supplemented by other research and consultations with key stakeholders.

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For more information on WPSM and other reports and resources go to:
www.planningourworkforce.ca

# Labour Market Information - Indicators

## CANADIAN BUSINESS COUNTS

Statistics Canada maintains an on-going count of business establishments across the country, relying on administrative data (corporate income tax and GST files) and surveys of businesses. This registry of businesses was called Canadian Business Patterns but has been re-branded as ***Canadian Business Counts*** to reflect changes in how the data is analyzed. Since this change is still relatively new, only the data as of June 2017 will be profiled.

**City of Greater Sudbury**

## CENSUS DATA

Every 5 years Canada carries out a national survey, the most recent being 2016. The Census assembles a wide range of information regarding demographic characteristics such as population, age, gender, type of dwelling, language, marital status, income, immigration, and other labour market data.

This report will focus on labour market data that was released in November 2017 relevant to the WPSM catchment area and includes: employment by industry, employment by occupation, place of work status, and level of educational attainment. Comparisons will be made to census data from 2011.

It is important to note that all census data is based on where residents live, not where their jobs are. For Ontario data, this is not such a major issue, as only a fraction of the population leaves the province to work. However, in small geographies, there can be more commuting that crosses census division boundaries.

**District of Sudbury**

**District of Manitoulin**

# Greater Sudbury

## NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 1a GREATER SUDBURY
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
JUNE 2017

| INDUSTRY SECTOR 2-DIGIT NAICS | NUMBER OF BUSINESSES BY EMPLOYEE SIZE | | | | | | | | % | RANK |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0 | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100+ | TOTAL | | |
| 11 Agriculture, Forestry, Fishing | 62 | 12 | 4 | 5 | 1 | 1 | 0 | **85** | 1 | 18 |
| 21 Mining | 55 | 10 | 5 | 5 | 2 | 6 | 12 | **95** | 1 | 17 |
| 22 Utilities | 10 | 2 | 2 | 0 | 0 | 1 | 0 | **15** | 0 | 19 |
| 23 Construction | 628 | 238 | 113 | 65 | 49 | 17 | 13 | **1123** | 10 | **2** |
| 31-33 Manufacturing | 93 | 51 | 28 | 31 | 33 | 13 | 6 | **255** | 2 | 12 |
| 41 Wholesale Trade | 131 | 70 | 71 | 54 | 38 | 14 | 2 | **380** | 3 | **9** |
| 44-45 Retail Trade | 376 | 181 | 211 | 171 | 81 | 30 | 14 | **1064** | 10 | **4** |
| 48-49 Transportation/Warehousing | 212 | 46 | 19 | 24 | 15 | 6 | 3 | **325** | 3 | 11 |
| 51 Information & Cultural | 66 | 12 | 6 | 9 | 6 | 3 | 2 | **104** | 1 | 16 |
| 52 Finance & Insurance | 654 | 84 | 54 | 27 | 22 | 5 | 1 | **847** | 8 | **6** |
| 53 Real Estate, Rental, Leasing | 2344 | 134 | 32 | 31 | 20 | 0 | 0 | **2562** | 23 | **1** |
| 54 Professional Scientific Tech | 677 | 221 | 55 | 46 | 22 | 12 | 2 | **1035** | 9 | **5** |
| 55 Management of Companies | 103 | 8 | 5 | 5 | 2 | 1 | 0 | **124** | 1 | 14 |
| 56 Administrative Support | 164 | 73 | 36 | 37 | 16 | 12 | 14 | **352** | 3 | **10** |
| 61 Educational Services | 70 | 18 | 10 | 5 | 9 | 4 | 8 | **124** | 1 | 14 |
| 62 Health Care & Social Assist | 490 | 324 | 110 | 88 | 46 | 12 | 18 | **1088** | 10 | **3** |
| 71 Arts, Entertainment & Rec | 83 | 30 | 19 | 13 | 13 | 1 | 1 | **168** | 1 | 13 |
| 72 Accommodation & Food | 113 | 76 | 58 | 93 | 90 | 30 | 4 | **464** | 4 | **8** |
| 81 Other Services | 417 | 228 | 115 | 40 | 30 | 9 | 5 | **844** | 8 | **7** |
| 91 Public Administration | 2 | 0 | 0 | 1 | 3 | 1 | 1 | **8** | 0 | 20 |
| **TOTAL BUSINESSES** | 6750 | 1818 | 953 | 751 | 498 | 178 | 106 | **11054** | | |
| **% of all classified and unclassified businesses** | **63%** | **16%** | **8%** | **6%** | **4%** | **1%** | **1%** | **100%** | | |
| **Cumulative %** | **63%** | **79%** | **87%** | **93%** | **97%** | **98%** | **100%** | | | |
| **ONTARIO % of classified and unclassified businesses** | **70%** | **17%** | **5%** | **4%** | **2%** | **1%** | **1%** | | | |

***SOURCE: Statistics Canada, Canadian Business Counts***
***Highlighted cells: identify the three industries with the largest number of firms per employee size category***
***Classified businesses are businesses for which the industry classification is known***

## INSIGHTS: Number of businesses by employee size range

Table 1a illustrates that Greater Sudbury has a slightly different profile of establishments from the Manitoulin and Sudbury Districts. It's Real Estate & Rental & Leasing industry is made up of a large number of landlords of residential buildings and dwellings, but also of non-residential structures. Additionally, a portion of establishments in this sector represent a considerable number of real estate agents, brokers and property managers. The Construction sector is made up of a large number of residential building construction firms and specialty trades contractors, but also firms engaged in commercial and institutional building construction and infrastructure construction. In Retail Trade, the standard mix of stores (grocery stores, gas stations, pharmacies) are complemented by automotive and auto parts dealers; electronics, appliance and home furnishing stores; clothing stores; and sporting goods stores. Health Care & Social Assistance is represented by a large number of physicians' and dentists' offices, and child day-care services. Among mid-size establishments, a fair number are nursing homes and the largest facilities are hospitals. In the Professional, Scientific & Technical Services industry, the three largest categories are law, accounting and engineering firms and the next largest categories are other scientific and technical consulting services and computer systems design and related services.

## CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 1b GREATER SUDBURY
CHANGE IN THE NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE
(JUNE 2016 – JUNE 2017)

| NAICS | INDUSTRY SECTOR | FIRM SIZE (# OF EMPLOYEES) | | | | | TOTAL # OF FIRMS |
|---|---|---|---|---|---|---|---|
| | | 0 | 1-19 | 20-29 | 100+ | TOTAL | |
| 11 | Agriculture, forestry, fishing & hunting | -1 | -5 | -1 | 0 | -7 | 85 |
| 21 | Mining, quarrying, & oil & gas extraction | -8 | -2 | -2 | 1 | -11 | 95 |
| 22 | Utilities | -2 | 0 | 0 | 0 | -2 | 15 |
| 23 | Construction | 26 | 1 | -7 | 3 | 23 | 1123 |
| 31-33 | Manufacturing | 3 | 2 | -4 | 0 | 1 | 255 |
| 41 | Wholesale trade | -9 | -5 | -2 | -2 | -18 | 380 |
| 44-45 | Retail trade | -10 | 0 | -7 | -2 | -19 | 1064 |
| 48-49 | Transportation & warehousing | 0 | -4 | 2 | 0 | -2 | 325 |
| 51 | Information & cultural industries | 8 | 1 | 2 | 0 | 11 | 104 |
| 52 | Finance & insurance | 144 | 20 | -21 | -2 | 141 | 847 |
| 53 | Real estate & rental & leasing | 78 | 7 | -3 | 0 | 82 | 2562 |
| 54 | Professional, scientific & technical services | 0 | -4 | -6 | 0 | -1 | 1035 |
| 55 | Management of companies & enterprises | -144 | -4 | -1 | 0 | -149 | 124 |
| 56 | Administrative & support | 0 | -2 | -3 | 0 | -5 | 352 |
| 61 | Educational services | 8 | 6 | -1 | -1 | 12 | 124 |
| 62 | Health care & social assistance | 47 | -11 | 1 | 0 | 37 | 1088 |
| 71 | Arts, entertainment & recreation | -12 | -2 | -1 | 0 | -15 | 160 |
| 72 | Accommodation & food services | -2 | 6 | -6 | 3 | 1 | 464 |
| 81 | Other services | 40 | -9 | 6 | -1 | 36 | 844 |
| 91 | Public administration | 1 | -1 | 0 | 0 | 0 | 8 |
| | TOTALS | 176 | -6 | -54 | -1 | 115 | 11054 |

*SOURCE: Statistics Canada, Canadian Business Counts, June 2016 – June 2017*
*Green indicates an increase and red indicates a decrease in number of firms*

## INSIGHTS: Change in the number of employers by industry and by firm size

As illustrated in the above table (Table 1b), in Greater Sudbury, the increase in firms with zero employees offsets decreases in every other firm size category. There have been increases in nine industries, led mostly by increases in Construction; Information & Cultural Industries; Real Estate & Rental & Leasing; Health Care & Social Assistance; and Other Services. These increases have been led by increases in firms with zero employees, however there are a few exceptions, including Construction; and Information & Cultural Industries. There have been decreases in ten industries, led by larger decreases in Agriculture, Forestry, Fishing & Hunting; Mining, Quarrying & Oil & Gas Extraction; Wholesale Trade; Retail Trade; and Arts, Entertainment & Recreation. The reason why the gains in Finance & Insurance and decreases in Management of Companies & Enterprises have not been discussed more is because it is likely that a reclassification of firms led to a number of firms with zero employees to be reclassified from Management of Companies & Enterprises into Finance & Insurance. Of particular note, there has been a large decrease in firms with 20-99 (minus 54). This is mostly driven by losses in mid-sized Finance & Insurance firms.

## EMPLOYMENT BY INDUSTRY (changes between 2011-2016)

**TABLE 1c GREATER SUDBURY**
**EMPLOYMENT BY INDUSTRY – COMPARISONS BETWEEN 2011 AND 2016**

| NAICS | INDUSTRY SECTOR | 2016 | Changes between 2011 and 2016 | | % distribution by industry | |
|---|---|---|---|---|---|---|
| | | # | # | % | 2011 | 2016 |
| | ALL INDUSTRIES | 76750 | -385 | -0.5% | 100.0% | 100.0% |
| 11 | Agriculture, forestry, fishing & hunting | 390 | 180 | 85.7% | 0.3% | 0.5% |
| 21 | Mining, quarrying, & oil & gas extraction | 6365 | -535 | -7.8% | 8.9% | 8.3% |
| 22 | Utilities | 455 | -20 | -4.2% | 0.6% | 0.6% |
| 23 | Construction | 5100 | 80 | 1.6% | 6.5% | 6.6% |
| 31-33 | Manufacturing | 3395 | 260 | 8.3% | 4.1% | 4.4% |
| 41 | Wholesale trade | 2520 | -370 | -12.8% | 3.7% | 3.3% |
| 44-45 | Retail trade | 9600 | -140 | -1.4% | 12.6% | 12.5% |
| 48-49 | Transportation & warehousing | 3085 | -290 | -8.6% | 4.4% | 4.0% |
| 51 | Information & cultural industries | 1100 | -150 | -12.9% | 1.6% | 1.4% |
| 52 | Finance & insurance | 2180 | 5 | 0.2% | 2.8% | 2.8% |
| 53 | Real estate & rental & leasing | 1320 | -50 | -3.6% | 1.8% | 1.7% |
| 54 | Professional, scientific & technical services | 3675 | -155 | -4.0% | 5.0% | 4.8% |
| 55 | Management of companies & enterprises | 75 | 50 | 200.0% | 0.0% | 0.1% |
| 56 | Administration & support | 3100 | 820 | 36.0% | 3.0% | 4.0% |
| 61 | Educational services | 6750 | -445 | -6.2% | 9.3% | 8.8% |
| 62 | Health care & social assistance | 11780 | 870 | 8.0% | 14.1% | 15.3% |
| 71 | Arts, entertainment & recreation | 1175 | -140 | -10.6% | 1.7% | 1.5% |
| 72 | Accommodation & food services | 5315 | 440 | 9.0% | 6.3% | 6.9% |
| 81 | Other services (except public administration) | 3230 | -235 | -6.8% | 4.5% | 4.2% |
| 91 | Public administration | 6145 | -560 | -8.4% | 8.7% | 8.0% |

*SOURCE: Statistics Canada 2016 Census*
*Green indicates an increase in employment by that industry and red indicates a decrease in employment by that industry*

## INSIGHTS: Employment by industry changes

Although not shown here, the distribution of employment by industry in Greater Sudbury (Table 1c) is quite different than the Ontario average. Greater Sudbury has a much higher share of employment in Mining & Quarrying & Oil & Gas Extraction, as well as larger proportions of residents working in Retail Trade; Health Care & Social Assistance; and Public Administration. Greater Sudbury also has significantly lower proportions of residents employed in: Manufacturing; Finance & Insurance; and Professional, Scientific & Technical Services.

As illustrated in Table 1c, Greater Sudbury experienced a small drop in the number of employed residents between 2011 and 2016, a difference of 385 employed residents, representing a decrease of 0.5%. The largest decreases took place in Public Administration (-560, or 8.4%); Mining, Quarrying & Oil & Gas Extraction (-535, or 7.8%); and Educational Services (-445 or 6.2%). These were balanced out by several increases in: Health Care & Social Assistance (+870, or 8.0%); Administrative & Support (+820, or 36.0%); and Accommodation & Food Services (+440, or 9.0%). The major changes in the share of employment by industry were as follows: Health Care & Social Assistance (+1.2%); Public Administration (-0.7%); Mining, Quarrying & Oil & Gas Extraction (-0.6%); and Educational Services (-0.5%).

## EMPLOYMENT BY OCCUPATION (2011-2016)

**TABLE 1d GREATER SUDBURY**
**EMPLOYMENT BY OCCUPATION - COMPARISONS BETWEEN 2011 AND 2016**

| INDUSTRY SECTOR | 2016 | Changes between 2011 and 2016 | | % distribution by industry | |
|---|---|---|---|---|---|
| | # | # | % | 2011 | 2016 |
| ALL OCCUPATIONS | 76750 | -385 | -0.5% | 100.0% | 100.0% |
| Management occupations | 7170 | 460 | 6.9% | 8.7% | 9.3% |
| Business, finance, administration | 12355 | -855 | -6.5% | 17.1% | 16.1% |
| Natural & applied science | 4430 | -170 | -3.7% | 6.0% | 5.8% |
| Health occupations | 7060 | 1175 | 20.0% | 7.6% | 9.2% |
| Education, law, social, government | 9335 | -540 | -5.5% | 12.8% | 12.2% |
| Art, culture, recreation, sport | 1410 | -20 | -1.4% | 1.9% | 1.8% |
| Sales & service occupations | 18050 | 325 | 1.8% | 23.0% | 23.5% |
| Trades, transport & equipment operators | 12015 | -550 | -4.4% | 16.3% | 15.7% |
| Primary occupations (natural resources) | 3580 | -50 | -1.4% | 4.7% | 4.7% |
| Manufacturing & utilities occupations | 1350 | -155 | -10.3% | 2.0% | 1.8% |

*SOURCE: Statistics Canada, 2016 Census*

## INSIGHTS: Employment by occupation changes

There are small variations in the occupation data for Greater Sudbury such as slight increases in the share of employment in Health Occupations; Management Occupations and Sales and Service Occupations. The difference is accounted for in a lower share of residents employed in Business, Finance, Administration Occupations; Trades, Transport & Equipment Operators; Education, Law, Social, Government Occupations; Natural & Applied Sciences; and Manufacturing & Utilities Occupations.

# District of Manitoulin

## NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

**TABLE 2a MANITOULIN DISTRICT**
**NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE**
**JUNE 2017**

| INDUSTRY SECTOR 2-DIGIT NAICS | NUMBER OF BUSINESSES BY EMPLOYEE SIZE | | | | | | | | % | RANK |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0 | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100+ | TOTAL | | |
| 11 Agriculture, Forestry, Fishing | 126 | 14 | 0 | 1 | 1 | 1 | 0 | **143** | 14 | **1** |
| 21 Mining | 4 | 0 | 0 | 0 | 0 | 0 | 0 | **4** | 0 | 20 |
| 22 Utilities | 13 | 0 | 0 | 0 | 0 | 0 | 0 | **13** | 1 | 16 |
| 23 Construction | 62 | 36 | 15 | 6 | 0 | 0 | 0 | **119** | 11 | **3** |
| 31-33 Manufacturing | 12 | 8 | 3 | 1 | 1 | 0 | 0 | **25** | 2 | 12 |
| 41 Wholesale Trade | 12 | 5 | 0 | 1 | 0 | 0 | 0 | **18** | 2 | 14 |
| 44-45 Retail Trade | 49 | 28 | 26 | 17 | 3 | 3 | 0 | **126** | 12 | **2** |
| 48-49 Transportation/Warehousing | 25 | 12 | 2 | 3 | 3 | 2 | 2 | **49** | 5 | **9** |
| 51 Information & Cultural | 6 | 4 | 1 | 1 | 0 | 0 | 0 | **12** | 1 | 17 |
| 52 Finance & Insurance | 29 | 5 | 4 | 0 | 0 | 0 | 0 | **38** | 4 | **10** |
| 53 Real Estate, Rental, Leasing | 85 | 7 | 1 | 0 | 0 | 0 | 1 | **94** | 9 | **5** |
| 54 Professional Scientific Tech | 54 | 18 | 3 | 0 | 0 | 1 | 0 | **76** | 7 | **7** |
| 55 Management of Companies | 5 | 0 | 1 | 0 | 0 | 0 | 0 | **6** | 1 | 19 |
| 56 Administrative Support | 11 | 9 | 3 | 1 | 1 | 1 | 0 | **26** | 2 | 11 |
| 61 Educational Services | 3 | 4 | 1 | 0 | 0 | 0 | 1 | **9** | 1 | 18 |
| 62 Health Care & Social Assist | 26 | 17 | 13 | 5 | 5 | 5 | 1 | **72** | 7 | **8** |
| 71 Arts, Entertainment & Rec | 14 | 4 | 3 | 1 | 1 | 0 | 0 | **23** | 2 | 13 |
| 72 Accommodation & Food | 47 | 19 | 18 | 11 | 3 | 0 | 0 | **98** | 9 | **4** |
| 81 Other Services | 43 | 27 | 8 | 2 | 1 | 2 | 0 | **83** | 8 | **6** |
| 91 Public Administration | 2 | 0 | 2 | 3 | 6 | 3 | 2 | **18** | 2 | 15 |
| **TOTAL BUSINESSES** | 628 | 217 | 104 | 53 | 25 | 18 | 7 | **1052** | | |
| **% of all classified and unclassified businesses** | **61%** | **20%** | **10%** | **5%** | **2%** | **2%** | **1%** | **101%** | | |
| **Cumulative %** | **61%** | **81%** | **91%** | **96%** | **98%** | **100%** | **101%** | | | |
| **ONTARIO % of classified and unclassified businesses** | **70%** | **17%** | **5%** | **4%** | **2%** | **1%** | **1%** | | | |

***SOURCE: Statistics Canada, Canadian Business Counts***
***Highlighted cells: identify the three industries with the largest number of firms per employee size category***
***Classified businesses are businesses for which the industry classification is known***

## INSIGHTS: Number of businesses by employee size range

As illustrated in Table 2a, the most predominant industry by number of businesses in the Manitoulin District continues to be Agriculture, and a subsector in this industry is beef cattle ranching. Retail Trade is made up of a very diverse mix of stores, from grocery stores and pharmacies, to gas stations, and building material suppliers. The Construction sector is largely made up of residential building construction and specialty trade contractors. Accommodation & Food Services is primarily represented by full-service restaurants, housekeeping cottages, and bed and breakfast establishments. The large number of solo operators in the Real Estate & Rental & Leasing industry are landlords of residential buildings and dwellings.

## CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 2b MANITOULIN DISTRICT
CHANGE IN THE NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE
(JUNE 2016 – JUNE 2017)

| NAICS | INDUSTRY SECTOR | FIRM SIZE (# OF EMPLOYEES) | | | | | TOTAL # OF FIRMS |
|---|---|---|---|---|---|---|---|
| | | 0 | 1-19 | 20-29 | 100+ | TOTAL | |
| 11 | Agriculture, forestry, fishing & hunting | 18 | -2 | -1 | 0 | 15 | 143 |
| 21 | Mining, quarrying, & oil & gas extraction | 1 | 0 | 0 | 0 | 1 | 4 |
| 22 | Utilities | 2 | 0 | 0 | 0 | 2 | 13 |
| 23 | Construction | 14 | 2 | 0 | 0 | 16 | 119 |
| 31-33 | Manufacturing | -3 | 2 | 0 | 0 | -1 | 25 |
| 41 | Wholesale trade | -2 | -1 | 0 | 0 | -3 | 18 |
| 44-45 | Retail trade | 11 | 2 | -1 | 0 | 12 | 126 |
| 48-49 | Transportation & warehousing | 1 | -3 | 2 | 0 | 0 | 49 |
| 51 | Information & cultural industries | 0 | 0 | 0 | 0 | 0 | 12 |
| 52 | Finance & insurance | 5 | 3 | -4 | 0 | 4 | 38 |
| 53 | Real estate & rental & leasing | -5 | 1 | 0 | 0 | -4 | 94 |
| 54 | Professional, scientific & technical services | 2 | 3 | 0 | 0 | 5 | 76 |
| 55 | Management of companies & enterprises | -7 | -2 | 0 | 0 | -9 | 6 |
| 56 | Administrative & support | 1 | -1 | 0 | -1 | -1 | 26 |
| 61 | Educational services | 0 | 0 | 0 | 0 | 0 | 9 |
| 62 | Health care & social assistance | 2 | -1 | 0 | 0 | 1 | 72 |
| 71 | Arts, entertainment & recreation | -2 | 2 | 0 | 0 | 0 | 23 |
| 72 | Accommodation & food services | -6 | 1 | -1 | 0 | -6 | 98 |
| 81 | Other services | -1 | 1 | -1 | 0 | -1 | 83 |
| 91 | Public administration | 0 | -1 | 1 | 0 | 0 | 18 |
| | TOTALS | 33 | 6 | -5 | -1 | 31 | 1052 |

*SOURCE: Statistics Canada, Canadian Business Counts, June 2016 – June 2017*
*Green indicates an increase and red indicates a decrease in number of firms*

## INSIGHTS: Change in the number of employers by industry and by firm size

Overall, for the Manitoulin District, as illustrated in Table 2b above, there have been net gains in smaller firms (between 0 and 19 employees) and an overall increase of 31 firms. Only four industries registered total increases in categories other than zero employees. Seven industries registered a decrease, also mostly due to changes in zero employee firms, and five industries had no change whatsoever. The one decrease among 100+ employee firms was in Administrative & Support. There were also decreases in the number of establishments in the 20-99 employee category over five industries: Agriculture, Forestry, Fishing & Hunting; Retail Trade; Finance & Insurance; Accommodation & Food Services; and Other Services.

## EMPLOYMENT BY INDUSTRY (changes between 2011-2016)

TABLE 2c MANITOULIN DISTRICT
EMPLOYMENT BY INDUSTRY – COMPARISONS BETWEEN 2011 AND 2016

| NAICS | INDUSTRY SECTOR | 2016 | Changes between 2011 and 2016 | | % distribution by industry | |
|---|---|---|---|---|---|---|
| | | # | # | % | 2011 | 2016 |
| | ALL INDUSTRIES | 4930 | -320 | -6.1% | 100.0% | 100.0% |
| 11 | Agriculture, forestry, fishing & hunting | 295 | -30 | -9.2% | 6.2% | 6.0% |
| 21 | Mining, quarrying, & oil & gas extraction | 65 | 0 | 0.05% | 1.2% | 1.3% |
| 22 | Utilities | 55 | 30 | 120.0% | 0.5% | 1>1% |
| 23 | Construction | 375 | -70 | -15.7% | 8.5% | 7.6% |
| 31-33 | Manufacturing | 165 | 15 | 10.0% | 2.9% | 3.3% |
| 41 | Wholesale trade | 80 | 40 | 100.0% | 0.8% | 1.6% |
| 44-45 | Retail trade | 560 | -70 | -11.1% | 12.0% | 11.4% |
| 48-49 | Transportation & warehousing | 355 | -40 | -10.1% | 7.5% | 7.2% |
| 51 | Information & cultural industries | 55 | -40 | -42.1% | 1.8% | 1.1% |
| 52 | Finance & insurance | 95 | 10 | 11.8% | 1.6% | 1.95 |
| 53 | Real estate & rental & leasing | 60 | -35 | -36.8% | 1.8% | 1.2% |
| 54 | Professional, scientific & technical services | 210 | 85 | 68.0% | 2.4% | 4.3% |
| 55 | Management of companies & enterprises | 0 | 0 | - | 0.0% | 0.0% |
| 56 | Administration & support | 130 | -10 | -7.1% | 2.7% | 2.6% |
| 61 | Educational services | 400 | 10 | 2.6% | 7.4% | 8.1% |
| 62 | Health care & social assistance | 985 | -90 | -8.4% | 20.5% | 20.0% |
| 71 | Arts, entertainment & recreation | 120 | 30 | 33.3% | 1.7% | 2.4% |
| 72 | Accommodation & food services | 310 | 70 | 29.2% | 4.6% | 6.3% |
| 81 | Other services (except public administration) | 235 | -5 | -2.1% | 4.6% | 4.8% |
| 91 | Public administration | 390 | -200 | -33.9% | 11.2% | 7.9% |

*SOURCE: Statistics Canada, 2016 Census*

## INSIGHTS: Employment by industry (changes between 2011-2016)

The distribution of employment by industry in Manitoulin (Table 2c) reveals slight variations from the distribution in Ontario (not illustrated), as well as differences with the District of Sudbury and Greater Sudbury. Manitoulin has a much higher share of employment in Health Care & Social Assistance, significantly higher than Ontario or the Sudbury District and Greater Sudbury. Like the District of Sudbury, Manitoulin also has a slightly higher share of Transportation & Warehousing; and Construction. Conversely, Manitoulin has a smaller share of Manufacturing; and Wholesale Trade. As was the case in the previous tables, Manitoulin has a lower share of Finance & Insurance; Real Estate & Rental & Leasing; and Professional, Scientific & Technical Services compared to provincial shares.

Between 2011 and 2016 Manitoulin experienced a drop of 320 employed residents, which represents a decrease of 6.1%. The most significant decreases took place in Public Administration (-200, or 33.9%); and Health Care & Social Assistance (-90, or 8.4%). The largest increases occurred in Professional, Scientific & Technical Services (+85, or 68.0%); Accommodation & Food Services (+70, or 29.2%); and Wholesale Trade (+40, or 100%).

The most significant changes to the percentage share by industry occurred in Professional, Scientific, & Technical Services (+1.9%); Accommodation & Food Services (+1.7%); Public Administration (-3.3%); and Health Care & Social Assistance (-0.5%).

## EMPLOYMENT BY OCCUPATION (2011-2016)

| TABLE 2d MANITOULIN DISTRICT<br>EMPLOYMENT BY OCCUPATION - COMPARISONS BETWEEN 2011 AND 2016 | | | | | |
|---|---|---|---|---|---|
| INDUSTRY SECTOR | 2016 | Changes between 2011 and 2016 | | % distribution by industry | |
| | # | # | % | 2011 | 2016 |
| ALL OCCUPATIONS | 4930 | -320 | -6.1% | 100.0% | 100.0% |
| Management occupations | 700 | 50 | 7.7% | 12.4% | 14.2% |
| Business, finance, administration | 770 | -50 | -6.1% | 15.6% | 15.6% |
| Natural & applied science | 145 | 20 | 16.0% | 2.4% | 2.9% |
| Health occupations | 455 | -10 | -2.2% | 8.9% | 9.2% |
| Education, law, social, government | 725 | -105 | -12.7% | 15.8% | 14.7% |
| Art, culture, recreation, sport | 125 | 5 | 4.2% | 2.3% | 2.5% |
| Sales & service occupations | 1035 | 25 | 2.5% | 19.2% | 21.0% |
| Trades, transport, & equipment operators | 725 | -245 | -25.3% | 18.5% | 14.7% |
| Primary occupations (natural resources) | 155 | 5 | 3.3% | 2.9% | 3.2% |
| Manufacturing & utilities occupations | 105 | 0 | 0.0% | 2.9% | 2.1% |

*SOURCE: Statistics Canada, 2016 Census*

## INSIGHTS: Employment by occupation (changes between 2011-2016):

One feature that stands out in the occupation data for the Manitoulin District (Table 2d), is the very high proportion of residents employed in Management Occupations; Health Occupations; and Education, Law, Social, Government Occupations; when compared to the District of Sudbury, Greater Sudbury, as well as Ontario. There are, however, fewer residents employed in Natural & Applied Sciences; and in Manufacturing & Utilities Occupations.

# District of Sudbury

## NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 3a SUDBURY DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
JUNE 2017

| INDUSTRY SECTOR 2-DIGIT NAICS | NUMBER OF BUSINESSES BY EMPLOYEE SIZE | | | | | | | | % | RANK |
|---|---|---|---|---|---|---|---|---|---|---|
| | 0 | 1-4 | 5-9 | 10-19 | 20-49 | 50-99 | 100+ | TOTAL | | |
| 11 Agriculture, Forestry, Fishing | 93 | 29 | 9 | 3 | 2 | 1 | 0 | **137** | 9 | **5** |
| 21 Mining | 2 | 0 | 0 | 0 | 1 | 0 | 3 | **6** | 0 | 20 |
| 22 Utilities | 7 | 2 | 1 | 1 | 0 | 0 | 0 | **11** | 1 | 18 |
| 23 Construction | 115 | 56 | 26 | 6 | 2 | 0 | 1 | **206** | 14 | **1** |
| 31-33 Manufacturing | 20 | 11 | 2 | 6 | 3 | 1 | 3 | **46** | 3 | 11 |
| 41 Wholesale Trade | 19 | 7 | 1 | 1 | 1 | 1 | 0 | **30** | 2 | 13 |
| 44-45 Retail Trade | 66 | 39 | 31 | 26 | 6 | 2 | 1 | **171** | 12 | **3** |
| 48-49 Transportation/Warehousing | 62 | 31 | 4 | 3 | 3 | 1 | 1 | **105** | 7 | **7** |
| 51 Information & Cultural | 4 | 6 | 2 | 0 | 0 | 0 | 0 | **12** | 1 | 17 |
| 52 Finance & Insurance | 37 | 4 | 5 | 4 | 0 | 0 | 0 | **50** | 3 | **10** |
| 53 Real Estate, Rental, Leasing | 165 | 13 | 3 | 0 | 1 | 1 | 1 | **184** | 12 | **2** |
| 54 Professional Scientific Tech | 45 | 9 | 6 | 3 | 0 | 0 | 0 | **63** | 4 | **9** |
| 55 Management of Companies | 8 | 1 | 0 | 0 | 0 | 0 | 0 | **9** | 1 | 19 |
| 56 Administrative Support | 23 | 5 | 2 | 1 | 1 | 0 | 0 | **32** | 2 | 12 |
| 61 Educational Services | 8 | 3 | 2 | 0 | 0 | 0 | 0 | **13** | 1 | 16 |
| 62 Health Care & Social Assist | 26 | 20 | 5 | 8 | 6 | 2 | 1 | **68** | 5 | **8** |
| 71 Arts, Entertainment & Rec | 10 | 9 | 5 | 2 | 1 | 0 | 0 | **27** | 2 | 14 |
| 72 Accommodation & Food | 92 | 34 | 19 | 11 | 6 | 4 | 0 | **166** | 11 | **4** |
| 81 Other Services | 76 | 34 | 11 | 3 | 0 | 0 | 0 | **124** | 8 | **6** |
| 91 Public Administration | 1 | 3 | 4 | 2 | 8 | 2 | 2 | **22** | 1 | 15 |
| **TOTAL BUSINESSES** | 879 | 316 | 138 | 80 | 41 | 15 | 13 | **1482** | | |
| **& of all classified and unclassified businesses** | **61%** | **21%** | **9%** | **5%** | **3%** | **1%** | **1%** | **100%** | | |
| **Cumulative %** | **61%** | **82%** | **91%** | **96%** | **99%** | **100%** | **100%** | | | |
| **ONTARIO % of classified and unclassified businesses** | **69%** | **18%** | **6%** | **4%** | **2%** | **1%** | **1%** | | | |

***SOURCE: Statistics Canada, Canadian Business Counts***
***Highlighted cells: identify the three industries with the largest number of firms per employee size category***
***Classified businesses are businesses for which the industry classification is known***

## INSIGHTS: Number of businesses by employee size range

As illustrated in Table 3a, the profile of establishments in the Sudbury District is very similar to that of the Manitoulin District in Construction (residential housing and specialty trades); Real Estate & Rental & Leasing (landlords of residential buildings and dwellings); and Retail Trade (wide mix of different categories of stores). The Sudbury District is however different from the Manitoulin District with respect to Agriculture, Forestry, Fishing & Hunting (in addition to beef cattle, also dairy cattle and other types of farming, as well as a larger number of logging firms) and in Accommodation & Food Services (with hotels, motels, resorts, more fast-food restaurants and a large number of hunting and fishing camps).

## CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 3b SUDBURY DISTRICT
CHANGE IN THE NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE
(JUNE 2016 – JUNE 2017)

| NAICS | INDUSTRY SECTOR | FIRM SIZE (# OF EMPLOYEES) | | | | | TOTAL # OF FIRMS |
|---|---|---|---|---|---|---|---|
| | | 0 | 1-19 | 20-29 | 100+ | TOTAL | |
| 11 | Agriculture, forestry, fishing & hunting | 8 | 0 | 1 | 0 | 9 | 137 |
| 21 | Mining, quarrying, & oil & gas extraction | -1 | -1 | 1 | 0 | -1 | 6 |
| 22 | Utilities | -3 | 1 | 0 | 0 | -2 | 11 |
| 23 | Construction | 10 | 1 | 0 | 1 | 12 | 206 |
| 31-33 | Manufacturing | 2 | 0 | -2 | 1 | 1 | 46 |
| 41 | Wholesale trade | 1 | -2 | 0 | 0 | -1 | 30 |
| 44-45 | Retail trade | 4 | -8 | 0 | 0 | -4 | 171 |
| 48-49 | Transportation & warehousing | -8 | 9 | -1 | 0 | 0 | 105 |
| 51 | Information & cultural industries | 1 | -1 | 0 | 0 | 0 | 12 |
| 52 | Finance & insurance | 8 | 5 | -5 | 0 | 8 | 50 |
| 53 | Real estate & rental & leasing | 9 | -1 | 0 | 1 | 9 | 184 |
| 54 | Professional, scientific & technical services | -1 | 4 | 0 | 0 | 3 | 63 |
| 55 | Management of companies & enterprises | -10 | 1 | 0 | 0 | -9 | 9 |
| 56 | Administrative & support | -2 | -3 | 1 | -1 | -5 | 32 |
| 61 | Educational services | -1 | 1 | 0 | 0 | 0 | 13 |
| 62 | Health care & social assistance | 1 | -2 | 0 | 0 | -1 | 68 |
| 71 | Arts, entertainment & recreation | 3 | -5 | 1 | 0 | -1 | 27 |
| 72 | Accommodation & food services | 4 | -3 | 1 | 0 | 2 | 166 |
| 81 | Other services | 0 | 2 | -1 | 0 | 1 | 124 |
| 91 | Public administration | 0 | 0 | 0 | 0 | 0 | 22 |
| | TOTALS | 25 | -2 | -4 | 2 | 21 | 1482 |

*SOURCE: Statistics Canada, Canadian Business Counts, June 2016 – June 2017*
*Green indicates an increase and red indicates a decrease in number of firms*

## INSIGHTS: Change in the number of employers by industry and by firm size

For the Sudbury District, there has been an equal number of industries that have seen overall increases as there have been industries that have seen decreases. This has resulted in a net increase in the number of firms in the Sudbury District, mostly driven by increases in the zero-employee category, and a modest increase in firms with 100+ employees. The most significant change is increases to Construction firms in almost every category (except for firms with 20-99 employees). Other than that, the significant changes appear to be increases in Professional, Scientific & Technical Services; and Agriculture, Forestry, Fishing, & Hunting; as well as decreases in Retail Trade; and Administrative & Support.

## EMPLOYMENT BY INDUSTRY (changes between 2011-2016)

**TABLE 3c SUDBURY DISTRICT**
**EMPLOYMENT BY INDUSTRY – COMPARISONS BETWEEN 2011 AND 2016**

| NAICS | INDUSTRY SECTOR | 2016 | Changes between 2011 and 2016 | | % distribution by industry | |
|---|---|---|---|---|---|---|
| | | # | # | % | 2011 | 2016 |
| | ALL INDUSTRIES | 9115 | 0 | 0.0% | 100.0% | 100.0% |
| 11 | Agriculture, forestry, fishing & hunting | 400 | -120 | -23.1% | 5.7% | 4.4% |
| 21 | Mining, quarrying, & oil & gas extraction | 450 | 45 | 11.1% | 4.4% | 4.9% |
| 22 | Utilities | 100 | 70 | 233.3% | 0.3% | 1.1% |
| 23 | Construction | 735 | 170 | 30.1% | 6.2% | 8.1% |
| 31-33 | Manufacturing | 1040 | 50 | 5.1% | 10.9% | 11.4% |
| 41 | Wholesale trade | 195 | 0 | 0.0% | 2.1% | 2.1% |
| 44-45 | Retail trade | 1050 | -180 | -14.6% | 13.5% | 11.5% |
| 48-49 | Transportation & warehousing | 650 | -5 | -0.8% | 7.2% | 7.1% |
| 51 | Information & cultural industries | 95 | 0 | 0.0% | 1.0% | 1.0% |
| 52 | Finance & insurance | 165 | -55 | -25.0% | 2.4% | 1.8% |
| 53 | Real estate & rental & leasing | 90 | -45 | -33.3% | 1.5% | 1.9% |
| 54 | Professional, scientific & technical services | 310 | 45 | 17.0% | 2.9% | 3.4% |
| 55 | Management of companies & enterprises | 0 | 0 | - | 0.0% | 0.0% |
| 56 | Administration & support | 210 | -80 | -27.6% | 3.2% | 2.3% |
| 61 | Educational services | 606 | -65 | -9.7% | 7.4% | 6.6% |
| 62 | Health care & social assistance | 1175 | 300 | 34.4% | 9.6% | 12.9% |
| 71 | Arts, entertainment & recreation | 90 | -30 | -25.0% | 1.3% | 1.0% |
| 72 | Accommodation & food services | 785 | 205 | 35.3% | 6.4% | 8.6% |
| 81 | Other services (except public administration) | 295 | -60 | -16.9% | 3.9% | 3.2% |
| 91 | Public administration | 690 | -220 | -24.2% | 10.0% | 7.6% |

*SOURCE: Statistics Canada, 2016 Census*

## INSIGHTS: Employment by industry (changes between 2011-2016)

As illustrated in Table 3c, the District of Sudbury has a much higher proportion of residents employed in goods-producing industries such as: Agriculture, Forestry, Fishing & Hunting; Mining, Quarrying & Oil & Gas Extraction; Construction; and Manufacturing. It has proportional shares of workers in service sectors like Retail Trade; and Accommodation & Food Services; and in public sector categories such as Educational Services; Health Care & Social Assistance; and Public Administration. Compared to Ontario (not illustrated here), the Sudbury District has significantly lower proportions of residents employed in Finance & Insurance; and Professional, Scientific & Technical Services.

Between 2011 and 2016, the number of employed residents in the Sudbury District did not change at all, despite considerable shifts within industries. Large declines occurred in Public Administration; Retail Trade; Agriculture, Forestry, Fishing, & Hunting; and Administrative & Support. Of 20 industries, seven registered increases in employment, with the largest gains in Health Care & Social Assistance; Accommodation & Food Services; and Construction.

The biggest changes in share by industry of employment are as follows: Health Care & Social Assistance (+3.3%); Accommodation & Food Services (+2.2%); Public Administration (-2.4%); and Retail Trade (-2.0%).

## EMPLOYMENT BY OCCUPATION (2011-2016)

| TABLE 3d SUDBURY DISTRICT<br>EMPLOYMENT BY OCCUPATION - COMPARISONS BETWEEN 2011 AND 2016 | | | | | |
|---|---|---|---|---|---|
| INDUSTRY SECTOR | 2016 | Changes between 2011 and 2016 | | % distribution by industry | |
| | # | # | % | 2011 | 2016 |
| ALL OCCUPATIONS | 9115 | 0 | 0.0% | 100.0% | 100.0% |
| Management occupations | 960 | -115 | -10.7% | 11.8% | 10.5% |
| Business, finance, administration | 1150 | 185 | 19.2% | 10.6% | 12.6% |
| Natural & applied science | 415 | 120 | 40.7% | 3.2% | 4.6% |
| Health occupations | 700 | 250 | 55.6% | 4.9% | 7.7% |
| Education, law, social, government | 950 | -80 | -7.8% | 11.3% | 10.4% |
| Art, culture, recreation, sport | 115 | -35 | -23.3% | 1.6% | 1.3% |
| Sales & service occupations | 1990 | -250 | -11.2% | 24.6% | 21.8% |
| Trades, transport, & equipment operators | 1860 | -140 | -7.0% | 21.9% | 20.4% |
| Primary occupations (natural resources) | 470 | 80 | 20.5% | 4.3% | 5.2% |
| Manufacturing & utilities occupations | 520 | -5 | -1.0% | 5.8% | 5.7% |

*SOURCE: Statistics Canada, 2016 Census*

## INSIGHTS: Employment by occupation (changes between 2011-2016)

Even with the drop in employed residents working in Sales & Service Occupations; and Trades, Transport & Equipment Operators; the share of all employment represented by these two categories still form a higher percentage of all employment compared to all other categories, and in the case of Trades, Transport & Equipment Operators, it still forms a higher percentage than the province. Primary Occupations grew between 2011 and 2016, and they hold a larger percentage share compared to the provincial average. The notably smaller shares, compared to the Ontario averages, are found among Business, Finance, Administration; Natural & Applied Science; and Education, Law, Social, Government.

# Other LMI Data

## TOP FIVE INDUSTRIES

As illustrated below in Table 4a, Greater Sudbury has the same top five industries (by number of employers) as Ontario, although in a different ranking. Both the Manitoulin District and the Sudbury District count Agriculture, Forestry, Fishing & Hunting; as well as Accommodation & Food Services; in their top five, as opposed to Professional, Scientific & Technical Services; and Health Care & Social Assistance, which are on the provincial list.

| TABLE 4a TOP FIVE INDUSTRIES 2017 | | | |
|---|---|---|---|
| **Manitoulin District** | **Sudbury District** | **Greater Sudbury** | **Ontario** |
| Agriculture, Forestry, Fishing, Hunting | Construction | Real Estate, Rental, Leasing | Real Estate, Rental, Leasing |
| Retail Trade | Real Estate, Rental, Leasing | Construction | Construction |
| Construction | Retail Trade | Retail Trade | Health Care, Social Assistance |
| Accommodation, Food Services | Accommodation, Food Services | Health Care, Social Assistance | Retail Trade |
| Real Estate, Rental, Leasing | Agriculture, Forestry, Fishing, Hunting | Professional, Scientific, Technical Services | Professional, Scientific, Technical Services |

## PLACE OF WORK

Table 4b provides place-of-work data for the Manitoulin and Sudbury Districts, and Greater Sudbury, presenting the numbers and percentage distribution by various categories. Overall, all areas have a similar proportion of employees with no fixed workplace (11-13%) or working outside of Canada (0-1%). The main difference is in the proportion of employees working at home. The provincial average for place-of-work is 7%; in comparison, the Manitoulin District has a high proportion at 12%; and Greater Sudbury has a low figure at 4%. Greater Sudbury has a considerably higher percentage of employees working in a usual place of work.

| TABLE 4b PLACE OF WORK (2016) | | | | | | |
|---|---|---|---|---|---|---|
| **WORK STATUS** | **Greater Sudbury** | | **Manitoulin District** | | **Sudbury District** | |
| | # | % | # | % | # | % |
| total workers | 76750 | 100% | 4930 | 100% | 9115 | 100% |
| worked at home (farms included) | 3170 | 4% | 610 | 12% | 580 | 6% |
| worked outside of Canada | 110 | 0% | 15 | 0% | 30 | 0% |
| no fixed workplace address | 8280 | 11% | 550 | 11% | 1230 | 13% |
| usual place of work | 65190 | 85% | 3750 | 76% | 7275 | 80% |

*Statistics Canada, 2016 Census*

*Figures for "Worked outside Canada" are small - when rounded off to the nearest percentage, they appear as zero*

## EDUCATIONAL ATTAINMENT

Five years ago, when the comparison was made of educational attainment levels between 2006 and 2011 across the Manitoulin and Sudbury Districts, Greater Sudbury and Ontario, there was an obvious pattern of improving levels of education. Among youth aged 15 to 24 years of age, there were generally higher levels of high school and post-secondary completion (except for the Manitoulin District), while among adults aged 25 to 44 years old as well as 45 to 64 years old, there were significant increases in the proportion of college and university certificate holders.

Five years later, that trend seems to have plateaued somewhat in Ontario, with only minor changes among various categories, with the cumulative effect being virtually no change across Ontario. Among youth there has been a slight, further increase in the percentage of high school finishers. Among the adult age groups, the proportion holding a post-secondary certificate has essentially not changed, although there have been changes in the mix between apprenticeship, college, and university completers. This is not cause for alarm: among those 25 to 44 years of age, 70% hold a post-secondary certificate. As well, Canada's cumulative levels of educational attainment for adults are the highest in the world.

Table 4c presents the data for 2016 and compares it to the 2011 numbers for Ontario, the Manitoulin and Sudbury Districts and Greater Sudbury.

| 2011 (%) | | | | TABLE 4c EDUCATIONAL ATTAINMENT | 2016 (%) | | | |
|---|---|---|---|---|---|---|---|---|
| Ontario | Manitoulin District | Sudbury District | Greater Sudbury | AGE CATEGORY<br>EDUCATIONAL ATTAINMENT | Ontario | Manitoulin District | Sudbury District | Greater Sudbury |
| | | | | **15 to 24-year olds** | | | | |
| 35% | 57% | 44% | 38% | No certificate, diploma or degree | 33% | 54% | 44% | 35% |
| 41% | 32% | 36% | 33% | High school certificate or equivalent | 42% | 31% | 35% | 39% |
| 2% | 1% | 4% | 4% | Apprenticeship certificate or equivalent | 2% | 4% | 4% | 3% |
| 10% | 6% | 12% | 16% | College certificate or diploma | 10% | 8% | 11% | 15% |
| 12% | 2% | 5% | 9% | University certificate, diploma or degree | 12% | 4% | 6% | 8% |
| | | | | **25 to 44-year olds** | | | | |
| 8% | 13% | 13% | 7% | No certificate, diploma or degree | 8% | 16% | 13% | 8% |
| 22% | 25% | 24% | 21% | High school certificate or equivalent | 22% | 25% | 24% | 20% |
| 6% | 12% | 13% | 9% | Apprenticeship certificate or equivalent | 5% | 9% | 10% | 8% |
| 25% | 31% | 34% | 37% | College certificate or diploma | 25% | 30% | 36% | 38% |
| 39% | 19% | 15% | 26% | University certificate, diploma or degree | 40% | 19% | 17% | 27% |
| | | | | **45 to 64-year olds** | | | | |
| 14% | 17% | 23% | 15% | No certificate, diploma or degree | 13% | 15% | 20% | 13% |
| 27% | 24% | 27% | 27% | High school certificate or equivalent | 27% | 25% | 31% | 28% |
| 9% | 16% | 17% | 12% | Apprenticeship certificate or equivalent | 7% | 12% | 12% | 9% |
| 22% | 27% | 22% | 27% | College certificate or diploma | 24% | 32% | 27% | 31% |
| 28% | 17% | 10% | 19% | University certificate, diploma or degree | 29% | 17% | 9% | 18% |

*Source: Statistics Canada, 2011 National Household Survey and 2016 Census*

# Employment Ontario (EO) Programs

## BACKGROUND

Since the data only tells part of the story, for this labour report, we have taken a slightly different approach. While we continue to report on MAESD data provided by EO Services Providers, consultations for this labour report focussed on the perspective of Service Providers re: employment trends, strategies used to find out who is hiring, resources used to help clients, services provided to employers, challenges that are faced, greatest barriers for clients, and what they feel leads to the most successful outcomes.

Aggregated EO data includes clients who use:

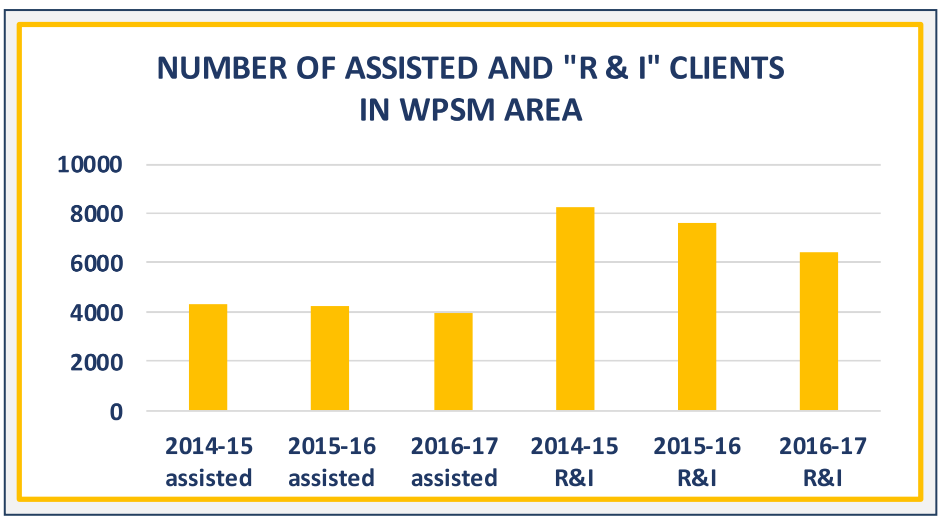
- Employment Services (ES);
- Literacy and Basic Skills (LBS);
- Second Career (SC) and
- Apprenticeships.

## EMPLOYMENT SERVICES DATA

Employment Services provide a range of services to assist clients with finding a job. They also have a resource centre where job-seekers can drop in and receive assistance with resumes, online job applications and various government forms, access job boards, computers, and job search sites, and other resources. EO data includes the number of clients who register and a count of R&I (resource and information) "unassisted" clients who come in to use their services but are not registered as clients.

Employment Services also provide Human Resources (HR) assistance to employers (i.e. screen/review applicant resumes; conduct interviews; etc.) however MAESD does not track this information.

### ES CLIENTS




## EO DATA (2016-17)

### DATA LIMITATIONS

In most cases, EO data is aggregated for the WPSM catchment area to protect client confidentiality and is suppressed when the number of clients is too small for one specific category

Age-specific categories are considered too broad

Educational attainment data does not include date of completion and/or relevance to current labour market requirements

Difficult to calculate true R & I client numbers as someone may come in multiple times to use services

*****

### GEOGRAPHIC AREAS REPORTED

Greater Sudbury
Manitoulin District
Sudbury District

### NORTHERN REGION

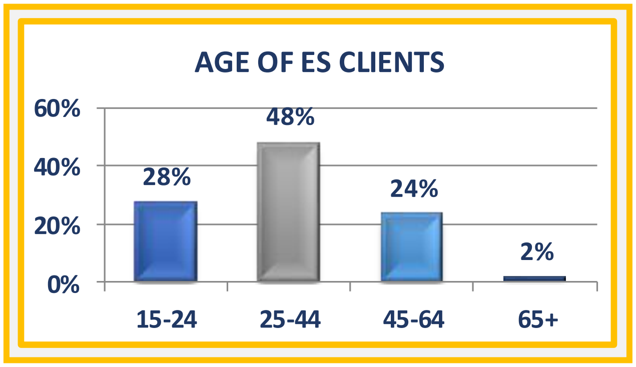
all of northern Ontario (includes WPSM data)

### PROVINCE

all of Ontario

ES clients (both those who register and those who don't) have declined once again this year. Local EO Service Providers feel this decrease may reflect changing demographics, job-seekers self-serving (surfing job boards and online job postings at home), lack of promotion of EO services, and use of other job assistance services such as those offered through post-secondary institutions.

## ES CLIENTS BY AGE GROUP



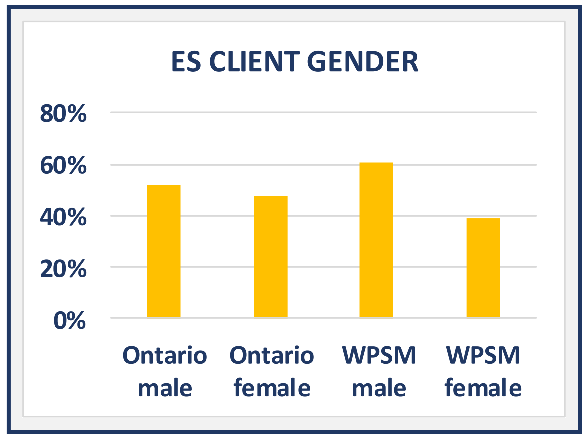

There are no significant changes to report regarding the age of ES clients between 2015-2016 and 2016-2017, although there has been a very small increase in number of clients 65 and older.

As previously noted in the limitations section, Service Providers continue to highlight that MAESD age categories are far too broad and do not match the age criteria for many of their programs to draw any conclusions. This continues to be a challenge.

## ES CLIENTS BY GENDER

Across Ontario, the gender of ES clients continues to be evenly split across men and women. However, for the WPSM area, more men use employment services. Local Service Providers feel that a higher number of men use their services because they:

- have lost/left their job (restructuring, lay-offs, quit or retired) and need/want to work;
- want to retrain to improve future prospects;
- want to supplement their retirement income; and
- are bored with retirement and want to continue working (however they may face an age bias by employers).

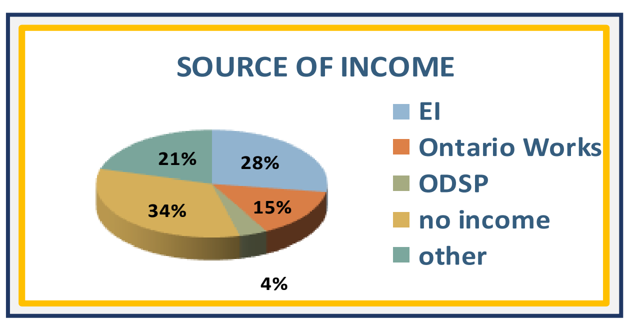



## ES CLIENTS BY DESIGNATED GROUPS

The number of ES clients who self-identified as a member of a designated group (newcomer, visible minority, person with disabilities and Indigenous) continues to be low and only saw a slight increase over the previous year. For 2016-17 client numbers are as follows: 149 Newcomers; 97 Visible Minorities; 266 Persons with Disabilities; and 500 Indigenous people. It is important to note however, that designated groups make up roughly 25% of all job-seekers registered as a client. MAESD data also showed an increase in internationally trained professionals from 129 (in 2015-16) to 162 (in 2016-17) who used Employment Services.

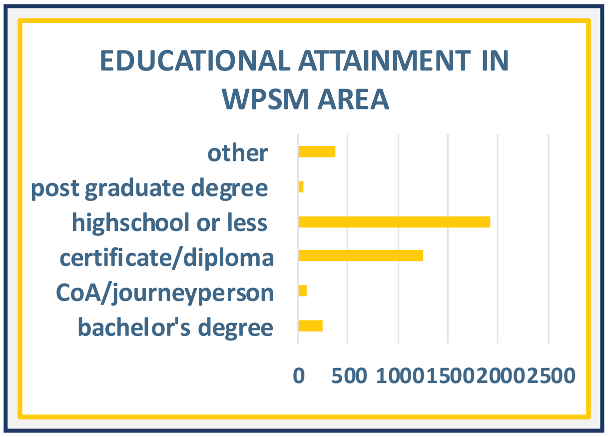
## ES CLIENTS SOURCE OF INCOME

Information on the client's source of income is recorded at intake. Since last year, there has been a slight increase in ES clients receiving EI (Employment Insurance) and a slight decrease in those reporting no income.



## ES CLIENTS BY EDUCATIONAL ATTAINMENT

It is well known that lower levels of educational attainment result in higher levels of unemployment and underemployment. The educational attainment of ES clients across the WPSM Board area follows a similar pattern to Northern Ontario and the rest of the province, with the exception of those with a university degree. There are fewer university degree holders amongst ES clients in the WPSM area and Northern region compared to Ontario, but a slightly higher proportion of individuals with high school (or less) and college diplomas.




With college diplomas, EO Service Providers noted that they also assess what skills are transferrable and what skills may be outdated and require upgrading. In other words, a degree or diploma from 20+ years ago may no longer be relevant in today's job market.

## LAY-OFF OCCUPATIONS

Similar to last year, just over 50% of ES Clients provided information on which occupations they were laid off from. Interestingly, the highest number of lay-offs occurred in the same occupations in a slightly different order as follows:

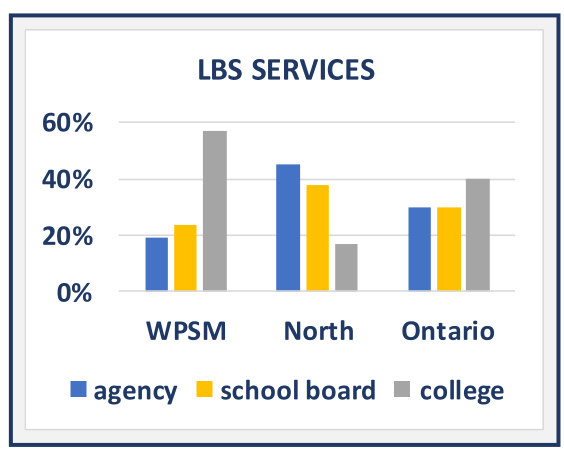
- Trades helpers, construction labourers (274);
- Service support occupations (220);
- Transport/heavy equipment operators (164);
- Sales support occupations (140);
- Service representatives (130);
- Industrial, electrical and construction trades (130); and
- Service supervisors (126).

## OUTCOMES AT EXIT

Employment Services are expected to meet a quota regarding the number of clients who exited their services to employment. The current target is set at 69%. Local data shows that the number of people who exited to employment meets the quota at 68%, however the number of clients who go on to training/education is at 15% which is slightly higher than the provincial quota of 10%.

# LITERACY AND BASIC SKILLS (LBS) DATA

Literacy and Basic Skills[1] programs offer free training in reading, writing, math, and basic work skills to help clients reach their goals (upgrade education or training, get a job, or be more independent). LBS services are offered in various ways (tutors, one-on-one, small groups, e-learning) and in various locations across Ontario. As noted in the chart, colleges have the largest share of LBS clients in the WPSM area.




The total number of in-person learners for 2016-17 (both new and carried over) for the WPSM area was 1,347, which is lower than 2015-16 at 1,452. The total number of LBS clients who use distance education or programs that are online (*e-channel learners*) across the

[1] *taken from MEASD website at: http://www.tcu.gov.on.ca/eng/apprentices/lbs.html*

province has increased from 4,432 in 2015-16 to 5,972 in 2016-17.

Similar to previous years, slightly more women (54%) use LBS services. In terms of age, 39% (n=395) of LBS clients in the WPSM area were between 15-24 years of age; 40% (n=533) were between 25-44 years of age; 19% (n=258) were between 45-65 years of age; and only 3% (n=37) were 65 and older. The number of clients between ages 45-64 who require computer upgrading or training has also increased.

LBS clients are also asked at intake what their *Learner Goal Path* is. In other words, why are they using LBS services? In the WPSM area, clients report a variety of reasons for using LBS services as follows: 552 for postsecondary; 297 for employment; 92 for independence; 73 for apprenticeship; and 33 to obtain a secondary school credit.

## SECOND CAREER (SC) DATA

Second Career[2] provides laid-off workers with skills training and/or education to help them find jobs in high-demand occupations. A grant is provided to eligible clients, based on need, to assist with tuition, books, transportation and basic living. The onus is on the client to provide proof of job opportunities that exist and go wherever the program is offered. Recent graduates are not eligible.

In 2016-17, the number of SC clients in the WPSM area declined from 330 in 2015-16 to 312. This follows a similar decline across the province from 8,626 clients in 2015-16 to 7,158 in 2016-17. As in the past, most clients are under the age of 45 (n=225), and in the WPSM area, there has been a drop in the number of female clients (n=110) representing only 35% of all SC clients. As in previous years, most clients have been out of employment/training for less than 3 months.

Second Career is focussed on high-demand jobs. Transport truck driver continues to be the career most in demand with 71 clients being approved for skills training programs. Only 88 SC clients went onto employment when they exited the program, however 151 found employment within 12 months.

## APPRENTICESHIP DATA

As noted in the chart, the number of new and active apprentices continues to decline across all areas of the province, including the WPSM area. Various reasons have been cited for this decline.

Some of the reasons cited include: stigma surrounding the trades; lack of parental and educational supports to promote this career pathway; lack of knowledge about the trades; unrealistic expectations by students; difficulty finding employers who will hire an apprentice; journeyperson-apprentice trade ratios which vary across all trades (and that some consider prohibitive and inequitable especially in Northern Ontario); and lack of educational awareness programs promoting the trades.

Recently, MAESD underwent a consultation process across Ontario to modernize the apprenticeship system. While the results and recommendations of this process are not yet

**TOP 10 NEW APPRENTICESHIP REGISTRATIONS AND NUMBER OF REGISTRATIONS**

**Electrician/construction & maintenance (78)**
**Automotive service technician (67)**
**Heavy duty equipment technician (59)**
**Powerline technician (52)**
**Hairstylist (52)**
**General carpenter (50)**
**Truck & coach technician (49)**
**Construction craft worker (42)**
**Industrial mechanic millwright (30)**
**Industrial electrician (30)**
**Child development practitioner (26)**

**NEW & ACTIVE APPRENTICES**

| | WPSM | Northern | Ontario |
|---|---|---|---|
| New 2014 - 15 | 842 | 2,361 | 26,018 |
| New 2015 - 16 | 818 | 2,192 | 25,793 |
| New 2016 - 17 | 726 | 1,968 | 24,890 |
| Active 2014 - 15 | 2,827 | 7,376 | 78,492 |
| Active 2015 - 16 | 2,312 | 6,638 | 78,959 |
| Active 2016 - 17 | 1,893 | 5,477 | 69,945 |

[2] *taken from MAESD website at: http://www.tcu.gov.on.ca/eng/secondcareer/whatitis.html*

public (or available to be reported here), the Government of Ontario is now offering a new incentive to employers who hire an apprentice after November 14, 2107. This new incentive called the Graduated Apprenticeship Grant for Employers (GAGE)[3] is automatically applied to an employer when they hire an apprentice.

One other important fact to glean from the EO data; in the WPSM area, and in fact across Ontario, the average age of an apprentice at registration is 27 which may indicate that students have already entered the workforce but are returning for trade-specific training.

## WORKPLACE GRANTS AND INCENTIVES

Various funding opportunities, incentives and wage subsidies are available through Employment Ontario. Data is provided on the following:

### CANADA ONTARIO JOB GRANT (COJG)

On March 28, 2014, Ontario signed the Canada-Ontario Job Fund Agreement with the federal government. The agreement is a key source of funding for new initiatives to help Ontario's employers develop their workforce through employer-led training (taken from the MAESD website).

EO data from 2016-17 provides a quick snapshot of employers who applied for and took advantage of the Canada Ontario Job Grant[4] (COJG). In the WPSM area, in 2016-17, 171 employers received the COJG which resulted in workplace training for 937 workers. In Ontario, 6,316 employers received the COJG resulting in 35,680 workers receiving training.

### YOUTH JOB CONNECTION (YJC)

The Youth Job Connection[5] program serves youth aged 15 to 29 who experience multiple and/or complex barriers to employment by providing more intensive supports beyond traditional job search and placement opportunities (taken from MAESD website).

EO data from 2016-17 shows that 310 youth utilized this fund. Of those who did, 123 were female and 184 were male. For all participants, the highest level of education at intake was high school or less.

# Observations and Recommendations

Since the EO data tells only part of the story, as with previous labour reports, WPSM held consultations with EO Managers and Service Providers. This year, consultations focused on key questions as follows:

**1. What labour market trends are you seeing?**

- ongoing misalignment between education and employment
- short term precarious contract work, need two jobs to survive, less fulltime work
- more post-retirement clients who: are bored, need money, still have children at home, and/or want to work but can't find an employer who will train older workers; these clients are often hired at fast food restaurants as they are reliable workers
- more turnover with younger workers – "job hopping"
- increased use of online shopping and changes in minimum wage will impact on jobs in retail
- high wage expectations (especially those coming back from Alberta)
- continued impact of restrictive trade ratios on apprenticeship opportunities

*3 https://www.ontario.ca/page/graduated-apprenticeship-grant-employers*
*4 For more information on the Canada Ontario Job Grant, go to: http://www.tcu.gov.on.ca/eng/eopg/cojg/*
*5 For more information on the Youth Job Connection funding go to: http://www.tcu.gov.on.ca/eng/eopg/programs/yjc.html*

- employer expectations keep going up, but wages are going down
- impact of the "underground" economy

**2. What industries are hiring? And for what kinds of jobs?**
- retirement homes (for personal support workers); call centres; AZ/DZ truck drivers; cashiers; heavy duty equipment technicians; janitors; construction labourers

**3. How do you find out who is hiring?**
- job developers will drop in or call employers
- use of social media; Canada job bank; job posting sites and job boards; employer websites; and newspaper ads
- other clients, other agencies, and employers that have been assisted in past with their HR needs
- new businesses opening up
- job fairs

**4. What resources do you use to help your clients find a job?**
- **life supports:** credit counselling; legal aid; housing; childcare; mental health; March of Dimes
- **courses with other partners:** i.e. food handling with the public health unit
- **employment supports:** resumes; assessments; how to market to employers; interview strategies; workshops; Educational Workplace Training (EWT); Second career; employment counselling; opportunities to network with peers; e-learning; Career Cruising (career exploration); job search; employer referrals; direct placement support with employers

**5. What services and resources do you use to help employers?**
- **FREE human resources:** office space to conduct interviews; interview preparation/questions; pre-screening/filter resumes; job matching and coaching; references; free job postings/advertising; assistance to new business starts re: type of employees needed
- **incentives/money:** funding for training (Canada Ontario Job Grant); other incentives, wage subsidies and stipends
- **workplace training:** soft skills; practical skills (use of cash register, computers, literacy, math, etc.)
- **employment supports:** relationship building; client placements (but if the placement does not work out, often difficult to rebuild the relationship with the employer); WSIB registration

**6. What are the greatest barriers for your clients?**
- some require lots of supports, but some supports are not funded
- barriers are increasing and some of the client's life issues are very complex and difficult to address
- cannot afford a driver's licence or are too anxious to get a licence or drive
- number who are diagnosed with mental health and/or addictions issues
- limited financial resources for support
- managing employer expectations
- may have the skills but employers not willing to pay

**7. What have you found to be most successful?**
- empowering clients
- when they don't come back because they have been successful, and/or they now have the tools to succeed (realize their own value, skills, good resume)
- tools and training supports, job trials and wage subsidies
- human element of EO – to deliver highly quality, professional and knowledgeable services; inclusive of all ages, cultures and gender
- EO's strong relationship with employers (networking, outreach, job fairs, social media)

**8. What are the greatest challenges for EO services?**
- **reduced client numbers:** due to changing demographics; job-seekers who self-serve or think they can (surf the internet for jobs); job-seekers who give up looking for a job; many post secondary

institutions now offer employment services; suggestion for EO services to return to a model where each agency is demographic-specific i.e. one service for youth and another one for older adults

- **lack of money/no budget to promote EO services**: to both job-seekers and employers; need for branding/rebranding
- **ministry quotas and targets:** no credit or target for number of employers assisted or HR services provided; too short of a timeframe to assist some clients; use of social media responses not counted in quota; challenge to classify clients (i.e. age categories are too broad);
- **employment support funds too limited:** currently only available for marginalized/barriered clients, but can't be used to help/support a college graduate who can't find a job/employer
- **perception of EO:** viewed by some employers and job-seekers as a social service, not an employment service
- **challenges with the way EO services are provided:** need to shift the way services are provided; handwritten signatures still required; online registrations do not show up in the quota data; too many forms for clients, including need to sign various forms; should do more remotely; unsure if employers use EO self-service
- **competition between EO services:** still driven by quotas (some feel numbers are meaningless); duplication of services; not sharing information (i.e. job postings, employers, etc.);
- **resource centres:** most feel they have fairly stable client numbers; well used resource

# Action Plan Update

## PRIORITY #1: support local labour market-related initiatives

| ACTION | PARTNERS | OUTCOME(S) | TIMELINE |
|---|---|---|---|
| **Chamber of Commerce - workforce-related taskforces/roundtables** | Sudbury Chamber of Commerce and business-related members | **Ring of Fire Taskforce:** Continue to advocate for northern workforce and business development strategy.<br>**Roundtable/luncheons 2017**: local MPs (Marc Serre and Paul Lefebvre); MNDM Dr. Christine Kaszcki; Mayor Bigger; Greater Sudbury Airport Manager; Economic Outlook; Workplace Reform.<br>**Roundtable events/luncheons 2018:** as relevant. | ongoing<br><br>as relevant |
| | Sudbury East Chamber of Commerce | Provide ongoing support and sharing of information on LMI issues, initiatives and resources. | as requested |
| **Indigenous workforce development** | Mnidoo Mnising Training Alliance | Provide support to training alliance; provide resources and information as relevant. | ongoing as requested |
| | Northshore Tribal Council - ASETS | Assist where requested re: skills inventory, LMI, industry profiles and workforce succession planning. | ongoing as requested |
| | Kenjgewin Teg (KTEI) | Assist with connections to local industry and LMI in support of the new trades innovation and training centre. | ongoing as requested |
| | Gezhootjig Employment and Training | LMI and support for application to the Skills Catalyst fund. | ongoing as requested |
| | Atikameksheng Anishnawbek (Whitefish) | Career fair and resources as requested. | Sept 2017 ongoing |
| | Wii-ni n'guch-tood Employment & Training (Wikwemikong) | LMI, support for employer survey and various workforce-related initiatives | Ongoing as requested |
| **Women of The Future** | Women of The Future committee | This event has been cancelled due to changing priorities. | complete |
| **LaCloche and Manitoulin business showcase** | LaCloche Manitoulin Business Assistance Corporation (LAMBAC) | Continue to support business resource showcase events to highlight local resources and services and LMI relevant to the area. | spring 2018 ongoing |
| **Employer information sessions** | LAMBAC, Weaver Simmons law firm, Collins Barrow, | Partnership, co-host an employer summit and/or the development of employer awareness sessions on labour | November 2018 |

| | | | |
|---|---|---|---|
| | Employment Services, etc. | laws, resources, etc. | |
| **Ontario Centre for Workforce Innovation (OCWI)** | College Boreal (Steering committee lead) | Assist College Boreal as the Francophone hub. Participate as a provincial steering committee member bringing the views of workforce planning to the table. | as requested ongoing monthly mtgs. |
| **Local Employment Planning Councils (LEPC)** | Workforce planning boards that are piloting LEPCs | Participate in any activities/requests related to the LEPC pilot including surveys, consultations, data, resources, etc. | pilot ends Sept 2018 |
| **Immigration Advisory Panel** | City of Greater Sudbury Council and topic-specific agencies | Participate as member of the advisory panel to City Council re: immigrants, newcomers and workforce issues. Resigned from panel due to lack of clarity, direction and expectations by advisory panel leads. | complete |
| **Government outreach** | WPSM initiated | Presentations to local MPs, MPPs, Mayors, economic development leads, etc. | ongoing |
| **Low carbon building skills (LCBS)** | reThink Green, local unions, construction sector | Partner on this labour market initiative to research local capacity, demand and need for training. | if funded December 2018 |
| **Youth roundtable** | RBC | Participated in roundtable and will assist with additional information as requested in future. | December 2018 |

## PRIORITY #2: promote current/forecasted in-demand skilled trades and professions

| ACTION | PARTNERS | OUTCOME(S) | TIMELINE |
|---|---|---|---|
| **Career resource sheets on in-demand trades** | Employment Support Services, Greater Sudbury | Continue to develop relevant career resource sheets identifying wages, projected growth, career pathways, etc. Will be disseminated to educators and posted on website. | March 2019 |
| **Women in skilled trades** | Tradeswomen, educators, industry, OYAP, etc. | Continue to support skilled trades summer camp for girls, skills competition, and other related activities. | Nov 2018 |
| **Apprenticeships** | Area school boards (OYAP); local colleges; EO services | Brochure dissemination strategy; develop "Becoming a Tradesperson in Ontario" brochure for apprentices.<br>Develop a career pathway poster for apprenticeships based on the above and any new/relevant information.<br>Host roundtable sessions between industry and student success leads to discuss realities of working in the trades. | complete<br>Nov 2018<br>December 2018 |
| **Top occupations** | WPSM lead | Use of new EMSI Analyst data to identify top projected growth occupations for census areas where possible. | annual |
| **Modern Mining and Technology Sudbury (MMTS)** | MMTS and various local partners | Continue to support event which provides experiential learning opportunities for students. | ongoing annual support |
| **Greenest workforce** | Forestry and wood manufacturing industry | Promote career information and job matching website to local educators and employment service providers. | complete |
| **Tourism Matters** | Tourism Northern Ontario | Participate with Northern Ontario Workforce Planning to support development of a tourism toolkit/resource and dissemination to educators. | complete |
| **Construction industry** | Northeastern Ontario Construction Association, Carpenters Union and other stakeholders | Review results of the Sector Planning Partnership grant report and opportunities to champion and/or implement recommendations. Explore opportunities to further develop the construction labour estimation model developed. Presentation to the Priorities Committee, Greater Sudbury Chamber of Commerce | ongoing |
| **FONOM (Federation of Northern Ontario Municipalities) conference** | The Labour Market Group, Northern Ontario Workforce Planning (NOWP) | Presentation to municipal leads (mayors, council members, economic development, CEOs) on labour market realities.<br>Explore opportunities to further assist municipalities with LMI. Contribute to development of northern LMI profile. | presentation June 2017<br>ongoing |

## PRIORITY #3: support labour market research, information, profiles, forecasts

| ACTION | PARTNERS | OUTCOME(S) | TIMELINE |
|---|---|---|---|
| **LMI consortium** | Laurentian University, Social Planning Council, Greater Sudbury Development | Revisit LMI data consortium and benefits of sharing LMI and maintaining a web-based portal for current reports and data. | lead retired project complete |

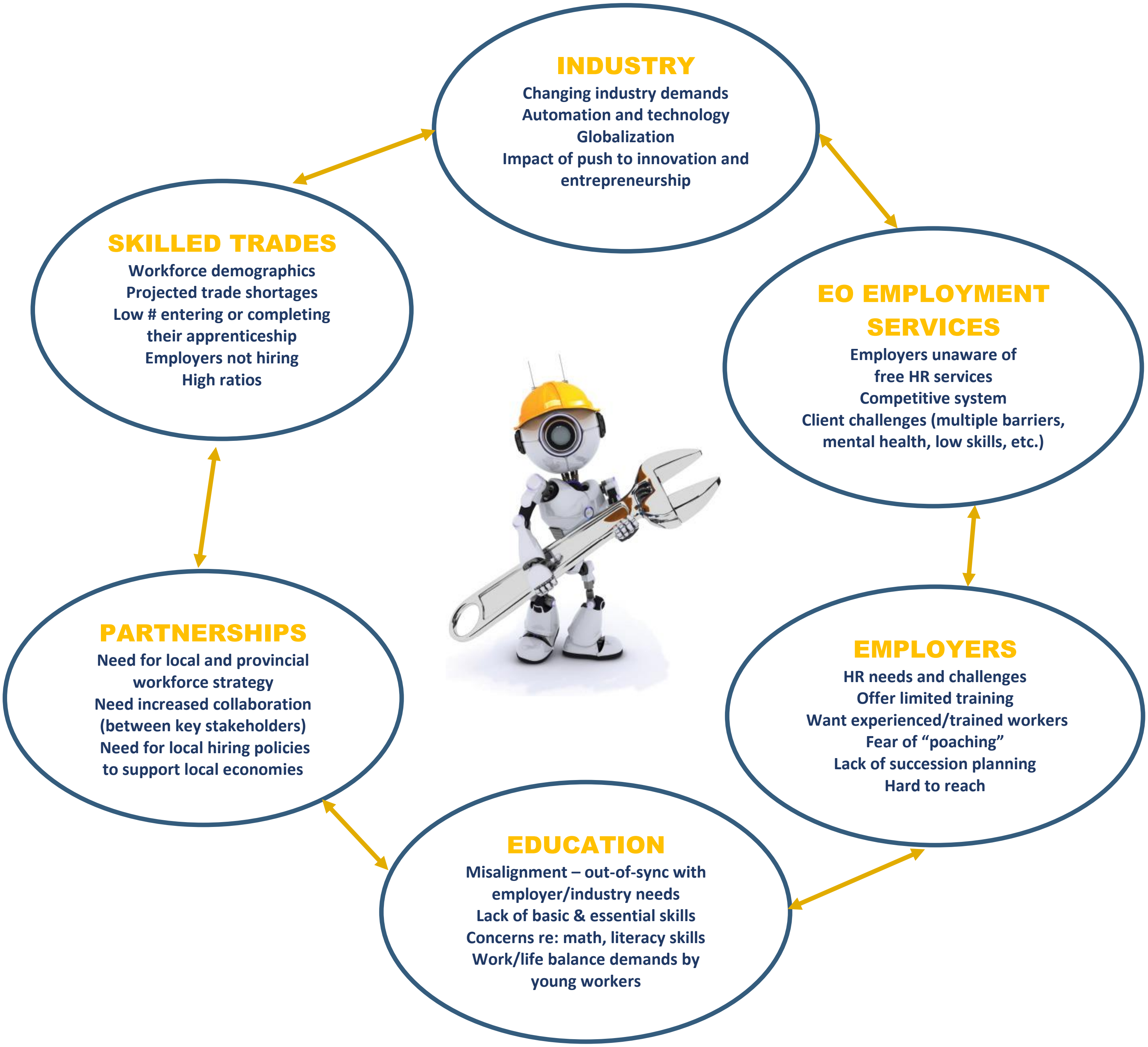
| | | | |
|---|---|---|---|
| | Corporation, colleges, etc. | | |
| **Workforce Planning Ontario (WPO)** | All local boards and LEPCs in Ontario | Participate in discussions re: provincial issues, challenges, and policies that support workforce planning in Ontario. Bring a northern perspective to the table. Development and dissemination of WPO video. | ongoing<br><br>video complete |
| **Agriculture** | WPSM lead | Use EMSI Analyst to identify agriculture industry and explore funding opportunities to develop local agriculture database. Participated in two food conferences and an agriculture roundtable consultation. Will continue support as relevant. | unable to complete full database ongoing |
| **Cultural design cluster** | CION; City of Greater Sudbury (potential) | Facilitate discussions to assess the cultural design network and identify workforce development needs. | unable to get uptake |
| **Job vacancy study** | Vicinityjobs.com, EO employment services, school boards, colleges | Develop quarterly reports using online job vacancy data to identify types of occupations being posted and by which industries. This will include a year-in-review report to be developed. Contact employers (posting jobs) where available. Continue with wide dissemination. | quarterly<br><br>June 2018<br><br>ongoing |
| **Automation and technology – impact on workforce** | Brookfield Institute | Continue to assist Brookfield Institute with their consultation process and connect them with local industry leads. | ongoing to completion |
| **Arts and culture** | Provincial "work in culture" committee (Ministry of Tourism, Culture and Sport) | Continue to participate in meetings and roundtables. Contribute to research and information re: labour market challenges in this sector. | 3-year project ending 2019 |
| **Industry support – trade ratios** | Airco, Jem Air and other industries | Assist local industries impacted by trade ratios. Help them with avenues to champion the need for northern exemptions re: ratios. | ongoing support |

## PRIORITY #4: support alignment between training/education and industry need

| ACTION | PARTNERS | OUTCOME(S) | TIMELINE |
|---|---|---|---|
| **Employerone survey** | Northern Ontario Workforce Planning | Complete an analysis and summary report of all previous employerone survey results since 2014 re: HR challenges, hiring practices, training, etc. | June 2018 |
| **Promoting the trades** | WPSM lead and various supporting organizations | Activities include supporting and promoting: ICE Challenge, Skills competition and trades-related resources and events. | annual activities |
| **Education Coordinating Team (ECT)** | Area school boards, post secondary institutions, training and employment services | Increased understanding by ECT re: needs of employers in key sectors, training opportunities, recruitment strategies, etc., to better align education with industry need. Current topics: math skills, use of cell phones, recruitment, etc. | monthly meetings |
| **Employment Ontario (EO) network** | WPSM labour market and EO consultations | Consultations on Employment Ontario data, LMI, issues to assist network, and gain insights into job-seeker needs. Promote EO services. | various consultations each year |
| **PEP (Procurement, Employment, and Partnership) conference** | Sudbury Chamber of Commerce and SNC Lavalin | Support and participate in regional event (targeting supply chain in resource-based industries) being held in Sudbury. Present on issues related to employment and training. | March 2018 |
| **Modernization of the Apprenticeship system** | MAESD | Participated in local consultations and contribute to future events/consultations. | July 2017<br>as requested |
| **Addressing PSW challenges** | Staff Plan A, long term care facilities, colleges, paramedics and possibly the NELHIN | As part of a partnership, bring key stakeholders together to discuss their perspectives on the PSW crisis and to develop a strategy to mitigate the crisis. | ongoing until completion |

# Moving Forward - Labour Market Themes

Little has changed regarding themes that continue to emerge in our local labour market, however, some are more pressing. For example, the projected labour shortages in some skilled trades and occupations, the erosion of entry-level jobs, the lack of basic and essential skills, and changing demographics (particularly in northern Ontario) are reaching a tipping point and need to be addressed with more vigour. Others, such as the future impact of automation and technology on the workforce are also critical to keep abreast of. All of these labour market challenges require greater research, increased partnerships and a strategic approach to ensure that a highly skilled and trained workforce is ready and available to meet future demand.



# Key Stakeholders & Resources

**GOVERNMENT:**
Employment Ontario (MAESD)
City of Greater Sudbury
Ministry of Agriculture, Food & Rural Affairs
Ministry of Labour
Ministry of Northern Development & Mines

**LABOUR:**
Various unions/locals

**ASSOCIATIONS:**
Infrastructure Health and Safety Association
Northeastern Ontario Construction Association
Ontario Construction Secretariat
SAMSSA

**INDIGENOUS ORGANIZATIONS:**
Atikameksheng Anishnawbek
First Nations - Economic development leads
Gezhtoojig Employment & Training
Kenjgewin Teg Educational Institute
Mnidoo Mnising Training Alliance
N'Swakamok Native Friendship Centre
North Shore Tribal Council
Wii-ni n'guch-tood Employment & Training

**INDUSTRY/BUSINESS SECTORS:**
Architecture
Arts and Culture
Construction
Employers (*2017 employerone* survey and employer summit)
Finance
Health
Information Technology
Manufacturing
Mining and mining supply services

**TRAINING, EDUCATION AND EMPLOYMENT:**
Cambrian College
Collège Boréal
Conseil scolaire catholique du Nouvel-Ontario
Conseil scolaire public du Grand Nord de l'Ontario
Employment Options Emploi
Employment Support Services, Greater Sudbury
Laurentian University
March of Dimes
Manitoulin – Sudbury District Services Board
Ontario College of Trades
Rainbow District School Board
Sudbury Catholic District School Board
Sudbury Vocational Resource Centre
YMCA Northeast Employment Services

**ECONOMIC DEVELOPMENT/BUSINESS:**
Greater Sudbury Development Corporation
LAMBAC
Regional Business Centre - Greater Sudbury
Sudbury Chamber of Commerce
Sudbury East Chamber of Commerce
Town of Espanola

**HEALTH & SOCIAL SERVICES:**
Health Sciences North
Northeast Local Health Integration Network

**IMMIGRATION/INTERNATIONALLY TRAINED:**
Local Immigration Partnership
Professions North/Nord
YMCA Northeast Newcomer Services

**DISABILITIES:**
Independent Living Sudbury Manitoulin

**RESEARCH AND INNOVATION:**
Brookfield Institute
CEMI (Centre for Excellence in Mining Innovation)
Deltion
Hardline
MIRARCO (Mining Innovation Rehabilitation and Applied Research Corporation)
NPI (Northern Policy Institute)
OCWI (Ontario Centre for Workforce Innovation)
SNOLAB

**MEDIA:**
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# Notes