Local Labour Market Plan 2018-2019

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

Workforce Development and Growth

Local Labour Market Plan

2018 - 2019

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 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) 2018-19, 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

This project is funded in part by the Government of Canada and the Government of Ontario

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Labour Market Observations

Local labour market information is the "buzz" word these days. Everyone wants to know what is happening in the local labour market – in other words: what jobs are growing, what jobs are declining, what industries are hiring and what jobs will look like in the future. The answer to all of these questions is not easy.

While economic forecasts provided by economists across the country are helpful, they fall short on looking at the human factor, local geographies, specific industries and the types of jobs that might be available. Additionally, no one is able to fully predict various global factors that might impact on our local economies – such as trade tariffs that have been imposed, nickel prices that have not rebounded as quickly as expected, and a new provincial government that is rapidly changing the landscape of Ontario to name a few.

Change can be both good and bad, depending on your perspective, but it often brings a time of uncertainty. In Ontario, over the last 10 years, we have heard (and largely ignored) that there will be a skilled trades shortage in the future. In reviewing data provided to us by the soon to be dissolved Ontario College of Trades (OCoT) on journeypersons and apprentices, we have reason to be concerned.

Our journeypersons are getting older, many of whom are eligible to retire, and the number of apprentices continues to decline. Various industry leaders in construction, mining and other trades-dependent industries are concerned about finding skilled trades labour. Is it because we have a cumbersome and complex apprenticeship system? high journeyperson to apprentice ratios? fewer employers willing to train? or an education system that does not promote the trades? It is all of these and more.

It will be important to keep an eye on how things transpire over the next few years and whether efforts to dissolve OCoT and reduce ratios (1:1 for all trades) will make a difference.

This also leads us to other factors that need to be taken into consideration. Automation and new technologies such as artificial intelligence is changing the work we do, how it is done and how many trained and skilled people are needed. This is the unpredictable aspect of trying to predict the future. Some have ventured to say that we don't even know what those jobs will be in the future as innovation and technology is changing at such a rapid pace – well beyond our imagination.

While we don't know where this will lead, there are some other things we do know. Persons with disabilities, Indigenous people, immigrants and women are still underutilized in the workforce. As a society, how do we better engage everyone who wants to work? have we made every effort to do this? and can we improve on education/training and workplace opportunities to create a more equitable playing field?

Recent Statistics Canada data also shows that wage disparity continues to be prevalent as noted on page 17 and 18 of this report. Clearly, we have a long way to go in terms of wage equity based on gender. Why is this still the case?

Not only is the wage gap of concern, but so are the types of jobs that are available. Our research into online job postings for our area indicates that around 30% of all jobs posted online are for sales and service occupations – everything from retails salespersons to cooks to janitors. This is confirmed by employers who say it is more and more difficult to find reliable people to fill these jobs. Why is this the case?

Employers have also repeatedly told us that while there are many excellent graduates who are solid employees, others are lacking basic and essential skills – like showing up to work on time or even showing up to work. It is another question of why is this the case? What has changed in our society? in our education systems? and in our efforts to prepare young people for work?

Each year, workforce planning boards across Ontario try to answer these and many of the questions that are specific to their local labour market area. Our mandate is to make sure that decisions being made in our community and our province are well informed and based on the best evidence and information that is available.

DATA OVERVIEW

WPSM BOARD AREA
Greater Sudbury
District of Manitoulin
District of Sudbury

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

New Census data will not be available until 2021 as the long-form census is only conducted every 5 years.

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

Local data is further supplemented by other research and consultations with key stakeholders.

The WPSM Board of Directors provides valuable LMI from local unions and businesses as well as those representing employment services, education, and equity groups.

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

About this Report

OVERVIEW

Local workforce planning boards such as Workforce Planning for Sudbury & Manitoulin (WPSM) have a mandate to identify labour market changes, trends and issues that impact on local economies. Various Labour Market Indicators (LMI) from Statistics Canada are used to provide some of this information. Although data from the 2016 Census was used in the previous report, other indicators such as occupations that have a higher percentage of workers 55 years of age and older are also included to provide an added perspective.

As in previous reports, LMI data is presented for the WPSM Board census area where it is available. Where possible, data has been supplemented by key stakeholder meetings and local consultations with businesses and related associations, employment services, economic development leads, educators and others.

DEMAND SIDE

When looking at the labour force, it is important to look at the demand and supply side of the labour market. For the ***demand side***, industry changes and employment trends are discussed along with current and emerging workforce themes. Other data sources are used to supplement local knowledge. For example, WPSM uses data from *Vicinityjobs* to identify online job postings for our area; *EMSI analyst,* an economic modelling system (which is available through OMAFRA) to provide insights into occupations projected to grow/decline; and other reliable sources to provide industry-specific information.

SUPPLY SIDE

Data from the ***supply side***, in other words, who is looking for work, training and/or employment assistance primarily comes from Employment Ontario (EO) which is funded by the Ministry of Training Colleges and Universities (MTCU). One of the greatest challenges continues to be matching job-seekers with industry needs and, since many employers do not train, this becomes even more complex.

EO data is also supplemented by local consultations with those who provide employment services and other data sources to identify: needs, projected gaps, training and education, opportunities to improve service, emerging trends, geographic challenges and other barriers.

ACTIONS

This report also provides a brief status update on some of the many labour market activities that WPSM supports in local communities and a summary of labour market initiatives that WPSM may be engaged in over the next 3 years.

Labour Market Information - Indicators

CENSUS AREA

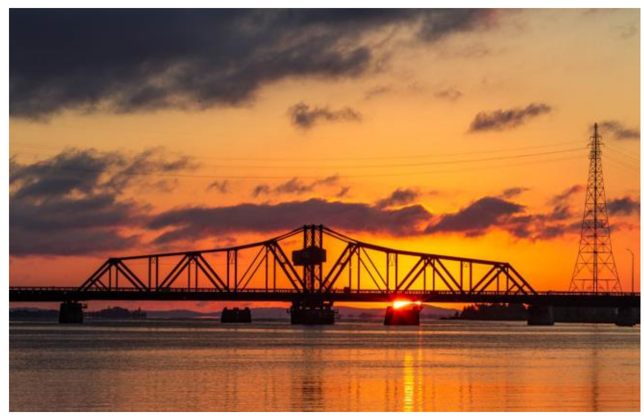
Each workforce planning board across Ontario is responsible for analyzing local LMI data for their area. The census areas that Workforce Planning for Sudbury & Manitoulin is responsible for includes: the City of Greater Sudbury, and the Districts of Sudbury and Manitoulin.

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. With a few changes in how this information has been collected, Statistics Canada has re-branded this data set as ***Canadian Business Counts.***

CENSUS DATA

Every 5 years Canada carries out a national survey, the most recent being 2016. The Census itself seeks to collect population data (number of persons, gender, age, and other demographic features) and aims to collect information about each individual in Canada. Meanwhile, the long-form questionnaire, with includes more questions on income, employment, migration, mobility and so on, is administered to one out of every four households, resulting in a very big sample. The long-form questionnaire implemented in 2016 was mandatory – however, the 2011 Census had a voluntary extended questionnaire and low response rates called into question whether or not the data accurately reflected the entire population.



Additionally, as data is dissected by more variables, the results for smaller categories become less reliable, not because of the sample but because of how Statistics Canada presents the data. For example, where data sets are very small (less than 10), data is randomly rounded to end with either “0” or “5” and in the case of the WPSM catchment, this is particularly relevant to the analysis of data for the Districts of Manitoulin and Sudbury, which have considerably smaller populations than Greater Sudbury.

Greater Sudbury

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 1a GREATER SUDBURY
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
JUNE 2018

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	60	10	5	5	1	1	0	82	1	18
21 Mining	53	9	6	8	3	6	12	97	1	17
22 Utilities	13	2	2	0	0	1	0	18	0	19
23 Construction	607	258	118	61	44	22	9	1119	10	2
31-33 Manufacturing	100	53	31	38	33	8	7	270	2	12
41 Wholesale Trade	128	56	83	53	42	10	2	374	3	9
44-45 Retail Trade	378	180	202	168	85	29	13	1055	9	5
48-49 Transportation/Warehousing	225	46	18	24	15	6	5	339	3	11
51 Information & Cultural	76	19	19	9	9	4	2	138	1	14
52 Finance & Insurance	650	84	45	31	18	6	3	837	7	6
53 Real Estate, Rental, Leasing	2490	134	30	29	17	2	0	2702	24	1
54 Professional Scientific Tech	696	220	63	40	23	14	3	1059	9	4
55 Management of Companies	109	9	6	3	2	2	0	131	1	15
56 Administrative Support	172	69	38	30	16	12	11	348	3	10
61 Educational Services	72	18	14	4	9	4	8	129	1	16
62 Health Care & Social Assist	524	324	107	89	42	13	18	1117	10	3
71 Arts, Entertainment & Rec	108	29	18	11	13	1	1	181	2	13
72 Accommodation & Food	110	73	59	86	110	19	2	459	4	8
81 Other Services	416	229	106	42	32	3	5	833	7	7
91 Public Administration	0	1	0	1	3	1	1	7	0	20
TOTAL BUSINESSES	6987	1823	970	732	517	164	102	11295		
% of all classified and unclassified businesses	65%	15%	8%	6%	4%	1%	1%	100%		
Cumulative %	65%	80%	88%	94%	98%	99%	100%			
ONTARIO % of classified and unclassified businesses	70%	17%	5%	4%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts 2018
Highlighted cells: indicate the 3 largest industries (by number of businesses) for each employee-size category
Classified businesses are businesses for which the industry classification is known

CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 1b GREATER SUDBURY CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE (JUNE 2017 – JUNE 2018)							
NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing & hunting	-2	-1	0	0	-3	82
21	Mining, quarrying, & oil & gas extraction	-2	3	1	0	2	97
22	Utilities	3	0	0	0	3	18
23	Construction	-21	21	0	-4	-4	1119
31-33	Manufacturing	7	12	-5	1	15	270
41	Wholesale trade	-3	-3	0	0	-6	374
44-45	Retail trade	2	-13	3	-1	-9	1055
48-49	Transportation & warehousing	13	-1	0	2	14	339
51	Information & cultural industries	10	20	4	0	34	138
52	Finance & insurance	-4	-5	-3	2	-10	837
53	Real estate & rental & leasing	146	-5	-1	0	140	2702
54	Professional, scientific & technical services	19	1	3	1	24	1059
55	Management of companies & enterprises	6	0	1	0	7	131
56	Administrative & support	8	-9	0	-3	-4	348
61	Educational services	2	3	0	0	5	129
62	Health care & social assistance	34	-2	-3	0	29	1117
71	Arts, entertainment & recreation	25	-4	0	0	21	181
72	Accommodation & food services	-3	-9	9	-2	-5	459
81	Other services	-1	-6	-4	0	-11	833
91	Public administration	-2	1	0	0	-1	7
	TOTALS	237	3	5	-4	241	11295

SOURCE: Statistics Canada, Canadian Business Counts, June 2017 – June 2018
Green indicates an increase and red indicates a decrease in number of firms

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

While Greater Sudbury experienced a net increase of 241 firms, almost all of these were in the category of firms with "0" employees, more than half of which were in *Real Estate & Rental & Leasing* (likely an increase in the number of solo private landlords or real estate agents). But among many other categories, there were notable increases of solo operations, and these nevertheless contribute to economic health (for example: 34 in *Health Care & Social Assistance;* 25 in *Arts, Entertainment & Recreation;* and 19 in *Professional, Scientific & Technical Services*).

Apart from the large change among firms with no employees, the net change in the other categories were quite small: an increase of three firms in the 1-19 employees category, an increase of five firms in the 20-99 employees category, and a decline of four firms in the 100+ employees category. Among increases, the most prominent were in *Information & Cultural Industries* as well as *Professional, Scientific & Technical Services*. The most notable declines were in *Other Services* (this sector is made up of auto repair shops and personal services such as beauty salons and hairdressers, and private and civic organizations), as well as *Administrative & Support* (this is comprised of temp agencies, call centres, janitorial services, landscaping services and other services to businesses).

OCCUPATIONS WITH OLDER WORKERS

TABLE 1c GREATER SUDBURY
JOBS WITH A HIGHER PROPORTION OF OLDER WORKERS (AGED 55 YEARS +)
(JUNE 2016)

OCCUPATION	TOTAL JOBS	55 YEARS + (#)	55 YEARS + (%)
Construction, home building & renovation managers	350	130	37.1%
Managers in agriculture	115	60	52.2%
HR & recruitment officers	155	55	35.5%
Property administrators	200	70	35.0%
Legal administrative assistants	195	70	35.9%
Court reporters, medical transcriptionists	80	35	43.8%
Insurance underwriters	40	25	62.5%
Accounting and related clerks	870	305	35.1%
Library, correspondence and other clerks	225	95	42.2%
Mail, postal and related workers	190	75	39.5%
Specialist physicians	255	95	37.3%
University professors and lecturers	440	175	39.8%
College and other vocational instructors	485	175	36.1%
Lawyers	210	95	45.2%
Home support workers, housekeepers	270	95	35.2%
Janitors, caretakers and building superintendents	1030	400	38.8%
Railway and yard locomotive engineers	45	30	66.7%
Bus drivers and other transit operators	370	155	41.9%
Taxi and limousine drivers	170	100	58.8%

SOURCE: Statistics Canada, 2016 Census

INSIGHTS: Older Workers

There are far more instances where the Greater Sudbury occupations with more older workers are different from those for the Manitoulin and Sudbury Districts, and in many instances the proportions are lower, usually in the 35% to 40% range. Also, the range of skills and/or education required for these jobs is far more varied in the Greater Sudbury list.

Interestingly, if one looks at the legal profession as a whole (legal administrative assistants, court reporters, lawyers) and post-secondary professors/instructors, the bulk of their workforce appears to be getting older across these industries.

District of Manitoulin

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 2a MANITOULIN DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
JUNE 2018

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	115	13	1	1	1	1	0	132	13	1
21 Mining	2	0	0	0	0	0	0	2	0	20
22 Utilities	14	0	0	0	0	0	0	14	1	16
23 Construction	54	35	17	8	0	0	0	114	11	3
31-33 Manufacturing	12	5	4	1	1	0	0	23	2	13
41 Wholesale Trade	15	3	0	1	0	0	0	19	2	14
44-45 Retail Trade	46	29	26	14	4	2	0	121	12	2
48-49 Transportation/Warehousing	24	11	4	4	2	2	2	49	5	9
51 Information & Cultural	7	4	2	1	0	0	0	14	1	16
52 Finance & Insurance	30	5	5	0	0	0	0	40	4	10
53 Real Estate, Rental, Leasing	95	9	0	0	0	0	1	105	10	4
54 Professional Scientific Tech	49	20	3	0	0	1	0	73	7	7
55 Management of Companies	5	1	1	0	0	1	0	8	1	19
56 Administrative Support	9	11	2	3	0	1	0	26	3	11
61 Educational Services	5	2	2	0	0	0	1	10	1	18
62 Health Care & Social Assist	27	17	13	5	4	5	2	73	7	7
71 Arts, Entertainment & Rec	17	5	1	2	0	0	0	25	2	12
72 Accommodation & Food	56	14	18	13	3	1	0	105	10	4
81 Other Services	43	31	5	3	1	2	0	85	8	6
91 Public Administration	1	0	2	3	6	3	2	17	2	15
TOTAL BUSINESSES	626	215	106	59	22	19	8	1055		
% of all classified and unclassified businesses	60%	20%	10%	5%	2%	2%	1%	100%		
Cumulative %	60%	80%	90%	95%	97%	99%	100%			
ONTARIO % of classified and unclassified businesses	70%	17%	5%	4%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts 2018
Highlighted cells: indicate the 3 largest industries (by number of businesses) for each employee-size category
Classified businesses are businesses for which the industry classification is known

CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 2b MANITOULIN DISTRICT CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE (JUNE 2017 – JUNE 2018)							
NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing & hunting	-11	0	0	0	-11	132
21	Mining, quarrying, & oil & gas extraction	-2	0	0	0	-2	2
22	Utilities	1	0	0	0	1	14
23	Construction	-8	3	0	0	-5	114
31-33	Manufacturing	0	-2	0	0	-2	23
41	Wholesale trade	3	-2	0	0	1	19
44-45	Retail trade	-3	-2	0	0	-5	121
48-49	Transportation & warehousing	-1	2	-1	0	0	49
51	Information & cultural industries	1	1	0	0	2	14
52	Finance & insurance	1	1	0	0	2	40
53	Real estate & rental & leasing	10	1	0	0	11	105
54	Professional, scientific & technical services	-5	2	0	0	-3	73
55	Management of companies & enterprises	0	1	1	0	2	8
56	Administrative & support	-2	3	-1	0	0	26
61	Educational services	2	-1	0	0	1	10
62	Health care & social assistance	1	0	-1	1	1	73
71	Arts, entertainment & recreation	3	0	-1	0	2	25
72	Accommodation & food services	9	-3	1	0	7	105
81	Other services	0	2	0	0	2	85
91	Public administration	-1	0	0	0	-1	17
	TOTALS	-2	6	-2	1	3	1055

SOURCE: Statistics Canada, Canadian Business Counts, June 2017 – June 2018
Green indicates an increase and red indicates a decrease in number of firms

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

Overall, there has been very little change between 2017 and 2018 in the Manitoulin District except for a net increase of three firms. There has been one "additional" firm in the 100+ employees category, in *Health Care & Social Assistance*, but that is likely due to a firm in the 20-99 employees category growing to 100 or more employees, hence a "loss" of one firm in the 20-99 employees category and an increase in the 100+ employees category. In addition, there have been two other declines in the 20-99 employees category, in *Transportation & Warehousing* and in *Administrative & Support*. On the other hand, there has been a net increase of six firms in the 1-19 employees category.

OCCUPATIONS WITH OLDER WORKERS

TABLE 2c MANITOULIN DISTRICT JOBS WITH A HIGHER PROPORTION OF OLDER WORKERS (AGED 55 YEARS +) (JUNE 2016)			
OCCUPATION	TOTAL JOBS	55 YEARS + (#)	55 YEARS + (%)
All management occupations	640	285	44.5%
Retail/wholesale trade managers	80	35	43.8%
Restaurant/food service managers	35	20	57.1%
Accommodation service managers	85	60	70.6%
Managers in agriculture	140	90	64.3%
Auditors, accountants, investment professionals	45	30	66.7%
Finance, insurance & business administrative	60	40	66.7%
Technical occupations in natural/applied sciences	60	35	58.3%
Physicians, dentists and veterinarians	35	25	71.4%
Social and community service professionals	65	30	46.2%
Professional occupations in art and culture	55	40	72.7%
Janitors, caretakers and building superintendents	105	50	47.6%
General farm workers	35	35	100.0%

SOURCE: Statistics Canada, 2016 Census

INSIGHTS: Older Workers

A number of these occupations typically have higher proportions of older workers across Ontario (all management occupations, and especially managers in agriculture – farmers; as well as janitors and caretakers). In the case of the Manitoulin District, the overall proportion of older workers in their labour force is higher, and the percentages for these occupations are particularly high, in most cases over 50%. This may lead to significant problems down the not-too-distant road as there will not be enough people of working age without increasing migration and/immigration into the District. The most notable is with general farm workers where the entire workforce is 55 years of age or older.

District of Sudbury

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 3a SUDBURY DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
JUNE 2018

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	99	30	8	3	1	1	1	143	10	5
21 Mining	4	0	0	0	1	0	3	8	1	19
22 Utilities	8	1	3	0	0	0	0	12	1	17
23 Construction	110	56	14	7	5	1	0	193	13	2
31-33 Manufacturing	19	5	3	7	4	1	3	42	3	11
41 Wholesale Trade	17	4	3	0	1	1	0	26	2	14
44-45 Retail Trade	50	36	28	26	6	2	1	149	10	4
48-49 Transportation/Warehousing	53	17	5	4	1	2	1	83	6	7
51 Information & Cultural	4	7	2	0	0	0	0	13	1	16
52 Finance & Insurance	39	3	6	2	0	0	0	50	3	10
53 Real Estate, Rental, Leasing	181	15	2	2	1	1	1	203	14	1
54 Professional Scientific Tech	51	8	3	4	0	0	0	66	5	9
55 Management of Companies	6	1	0	0	0	0	0	7	0	20
56 Administrative Support	20	5	2	3	0	0	0	30	2	13
61 Educational Services	6	3	0	0	0	0	0	9	1	18
62 Health Care & Social Assist	28	20	6	6	7	2	1	70	5	8
71 Arts, Entertainment & Rec	19	6	5	4	0	0	0	34	2	12
72 Accommodation & Food	84	30	19	11	9	3	0	156	11	3
81 Other Services	75	35	12	1	2	0	0	125	9	6
91 Public Administration	0	3	4	2	8	3	2	22	2	15
TOTAL BUSINESSES	873	285	125	82	46	17	13	1441		
% of all classified and unclassified businesses	63%	19%	8%	5%	3%	1%	1%	100%		
Cumulative %	63%	82%	90%	95%	98%	99%	100%			
ONTARIO % of classified and unclassified businesses	70%	17%	5%	4%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts 2018
Highlighted cells: indicate the 3 largest industries (by number of businesses) for each employee-size category
Classified businesses are businesses for which the industry classification is known

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 2017 – JUNE 2018)							
NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing & hunting	6	0	-1	1	6	143
21	Mining, quarrying, & oil & gas extraction	2	0	0	0	2	8
22	Utilities	1	0	0	0	1	12
23	Construction	-5	-11	4	-1	-13	193
31-33	Manufacturing	-1	-4	1	0	-4	42
41	Wholesale trade	-2	-2	0	0	-4	26
44-45	Retail trade	-16	-6	0	0	-22	149
48-49	Transportation & warehousing	-9	-12	-1	0	-22	83
51	Information & cultural industries	0	1	0	0	1	13
52	Finance & insurance	2	-2	0	0	0	50
53	Real estate & rental & leasing	16	3	0	0	19	203
54	Professional, scientific & technical services	6	-3	0	0	3	66
55	Management of companies & enterprises	-2	0	0	0	-2	7
56	Administrative & support	-3	2	-1	0	-2	30
61	Educational services	-2	-2	0	0	-4	9
62	Health care & social assistance	2	-1	1	0	2	70
71	Arts, entertainment & recreation	9	-1	-1	0	7	34
72	Accommodation & food services	-8	-4	2	0	-10	156
81	Other services	-1	0	2	0	1	125
91	Public administration	-1	0	1	0	0	22
	TOTALS	-6	-42	7	0	-41	1441

SOURCE: Statistics Canada, Canadian Business Counts, June 2017 – June 2018
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

While the Sudbury District has seen a net loss of 41 firms, the impact on employment may be balanced out by the fact that the loss of firms was largely in the “0” and 1-19 employees categories, while there was a net increase of seven firms in the 20-99 employees category. There were two changes in the 100+ employees category most likely because one firm in the *Agriculture, Forestry, Fishing & Farming* sector grew from 20-99 employees, and one in the *Construction* sector declined to the 20-99 employees category.

There have been across-the-board declines (with some likely decrease in employment) in the following sectors: *Wholesale Trade*; *Retail Trade*; *Transportation & Warehousing*; *Management of Companies*; and *Educational Services*. Slight increases in employment have likely occurred among the following: *Information & Cultural Industries; Real Estate & Rental & Leasing; Health Care & Social Assistance; Other Services;* and *Public Administration*.

OCCUPATIONS WITH OLDER WORKERS

TABLE 3c SUDBURY DISTRICT JOBS WITH A HIGHER PROPORTION OF OLDER WORKERS (AGED 55 YEARS +) (JUNE 2016)			
OCCUPATION	TOTAL JOBS	55 YEARS + (#)	55 YEARS + (%)
All management occupations	720	270	37.5%
Restaurant/food service managers	50	20	40.0%
Accommodation service managers	45	25	55.6%
Managers in agriculture	120	60	50.0%
Administrative services supervisors	35	20	57.1%
Occupations in art, culture, recreation & sport	100	40	40.0%
Hairstylists and barbers	45	25	55.6%
Janitors, caretakers and building superintendents	185	75	40.5%
Carpenters	55	20	36.4%
Construction millwrights and industrial mechanics	170	65	38.2%
Bus drivers and other transit operators	40	35	87.5%
General farm workers	50	25	50.0%
Supervisors, processing & manufacturing	60	25	41.7%

SOURCE: Statistics Canada, 2016 Census

INSIGHTS: Older Workers

Among occupations with higher proportions of older workers, the Sudbury District has some similarities with the Manitoulin District, particularly in the following occupations: restaurant/food service managers; accommodation service managers; and managers in agriculture. There are however, more occupations which are different. Overall, the proportion of older workers is also lower, usually between 40% to 50%, except in the case of bus drivers and other transit operators. This latter one is significant as transportation is already challenging in many parts of the district given the more rural and remote nature of the district, and an older workforce could lead to even more transportation challenges in future.

Other LMI Data

TOP FIVE INDUSTRIES

As illustrated below in Table 4, Greater Sudbury has the same top five industries by number of employers as Ontario, although in a different ranking. The Manitoulin and Sudbury Districts both count *Agriculture, Forestry, Fishing & Farming* 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. In every area, the top five industries account for over half of all businesses.

TABLE 4 TOP FIVE INDUSTRIES BY NUMBER OF FIRMS: DISTRICTS OF MANITOULIN AND SUDBURY, GREATER SUDBURY AND ONTARIO (2018)

Manitoulin District	Sudbury District	Greater Sudbury	Ontario
Agriculture, Forestry, Fishing, Farming	Real Estate, Rental, Leasing	Real Estate, Rental, Leasing	Real Estate, Rental, Leasing
Retail Trade	Construction	Construction	Professional Scientific Technical Services
Construction	Accommodation & Food Services	Health Care & Social Assistance	Construction
Accommodation & Food Services	Retail Trade	Professional Scientific Technical Services	Health Care & Social Assistance
Real Estate, Rental, Leasing	Agriculture, Forestry, Fishing, Farming	Retail Trade	Retail Trade

INSIGHTS: TOP FIVE INDUSTRIES

Real Estate and Rental & Leasing: A very large proportion of the businesses in this industry have no employees; these represent solo-business residential landlords and real estate agents. In Greater Sudbury, this industry makes up 23.9% of all businesses, yet if one divided this into no-employee businesses and businesses with employees, this sector would account for 36% of all no-employee businesses and only 5% of businesses with employees. In the Sudbury District, while this sector also has the most businesses, the total percentage is much lower at 14.1%; however, 21% of all no-employee businesses and only 4% of businesses with employees. For the Manitoulin District, this sector is smaller, coming in fifth with 10.0% of all businesses.

Construction: In all three areas, *Construction* represents a significant proportion of all industries, between 10% to 13%, and roughly half of these businesses are solo operations. The distribution by construction subsectors is also similar throughout the three areas – for example, specialty trade contractors account for at least half of all businesses with employees (in Greater Sudbury, as high as two-thirds); construction of buildings accounts for another 30-40%; and heavy and civil engineering construction accounts for 5-10%. The significant difference between the three areas are the sizes of the firms: in the Manitoulin District, no construction firm has more than 20 employees; in the Sudbury District, there are six firms that have between 20-99 employees; and in Greater Sudbury, there are nine firms with over 100 employees, with five of those firms in the heavy and civil engineering construction sub-sector.

Retail Trade: Around a third of retail trade businesses are also solo operations (40% in the Manitoulin District). As can be expected, 9 businesses in the Sudbury District and 6 in the Manitoulin District have few larger stores (20+ employees), and most of them are either food and beverage stores or building material and garden equipment and supplies dealers. Greater Sudbury has 126 stores with over 20 employees, and across all 11 retail trade subsectors, this includes 27 motor vehicle and parts dealers and 17 health and personal care stores.

Other Industries: The Districts of Sudbury and Manitoulin have large proportions of their businesses engaged in *Accommodation & Food Services* (Manitoulin District has more full-service restaurants, housekeeping cottages, and bed & breakfast establishments; and Sudbury District has more hotels, motels, resorts, fast-food restaurants and a large number of hunting and fishing camps). As well, *Agriculture, Forestry, Fishing & Farming* rounds out the top five list for these areas (Manitoulin District has a large number of beef cattle ranching operations; and the Sudbury District has beef cattle as well, but also dairy cattle and other types of farming, and a larger number of logging firms).

As noted, Greater Sudbury's other top five sectors are *Health Care & Social Assistance* (which includes physicians' and dentists' offices; child day-care services; nursing homes; and hospitals) and *Professional, Scientific and Technical Services* (mainly law, accounting and engineering firms).

OCCUPATIONS BY VARIOUS POPULATION CATEGORIES

This section provides an analysis of occupations by various population categories: males, females, visible minorities, Aboriginal identity and Francophone. Table 5 provides the percentage distribution of all employed residents in these various categories by each of the census divisions.

TABLE 5: PERCENTAGE DISTRIBUTION OF EMPLOYED LABOUR FORCE BY VARIOUS POPULATION CATEGORIES

	TOTAL EMPLOYED LABOUR FORCE	Males	Females	Visible minorities	Aboriginal identity	Francophones
NUMBER						
Workforce Planning Area	88,670	44,935	43,735	2,950	9,385	22,550
Manitoulin District	4,930	2,405	2,525	30	1,685	130
Sudbury District	9,120	4,685	4,435	105	1,520	2,250
Greater Sudbury	76,755	38,945	37,810	2,830	6,565	20,830
PERCENTAGE						
Workforce Planning Area	100.0%	50.7%	49.3%	3.3%	10.6%	25.4%
Manitoulin District	100.0%	48.8%	51.2%	0.6%	34.2%	2.6%
Sudbury District	100.0%	51.4%	48.6%	1.2%	16.7%	24.7%
Greater Sudbury	100.0%	50.7%	49.3%	3.7%	8.6%	27.1%

There are evident differences in the composition of the employed labour force for each of these areas: Greater Sudbury has a higher proportion of Francophones and visible minorities; Sudbury District also has a higher proportion of Francophones and a somewhat higher proportion of Aboriginal persons; while the Manitoulin District has a considerably higher proportion of Aboriginal persons and is the only area where females outnumber males among the employed, although by a small margin.

EMPLOYMENT INCOME BY OCCUPATIONS AND BY INDUSTRIES

Table 6 presents the employment income by occupation, by district and by gender. The figure shown is the median income. Median income represents the income of that person standing right in the middle of a group stretching from the person with the lowest income to the highest income. This is distinct from average income, which represents the total of everyone's income divided by the number of people in the group. Average income figures can sometimes appear much higher when the highest earners drive the average up, whereas median income reflects how individuals in the middle of the scale are faring.

The first row shows the median income for all individuals employed at the time of the 2016 Census. Remaining figures represent the employment incomes of those working full-time (over 30 hours a week) and full year (at least 49 weeks of the year). This allows for a better comparison between groups without having to account for how many people worked part-time or only part of the year. And even though the data is from 2016, its value is the relevant position of different categories, by geography, by occupation and by gender.

TABLE 6: MEDIAN EMPLOYMENT INCOME BY OCCUPATION AND GENDER			
CENSUS AREA	Manitoulin District	Sudbury District	Greater Sudbury
MALES			
ALL EMPLOYED	$ 29,347	$ 57,987	$ 58,250
ALL OCCUPATIONS (full time, full year workers)	$ 39,638	$ 65,407	$ 69,260
Management occupations	$ 26,077	$ 59,336	$ 80,216
Business, finance, administration	$ 45,972	$ 63,480	$ 59,112
Natural and applied sciences	$ 62,580	$ 69,065	$ 79,973
Health occupations	$ 83,577	$ 86,709	$ 86,428
Education, law, social, government	$ 67,735	$ 88,628	$ 87,384
Art, culture, recreation and sport	$ 37,425	$ -------	$ 40,689
Sales and service occupations	$ 30,592	$ 36,035	$ 40,777
Trades, transport, equipment operators	$ 37,144	$ 64,774	$ 64,654
Primary occupations (natural resources)	$ 42,451	$ 81,308	$ 108,366
Manufacturing and utilities occupations	$ 57,657	$ 82,048	$ 75,481
FEMALES			
ALL EMPLOYED	$ 33,704	$ 31,030	$ 36,357
ALL OCCUPATIONS (full time, full year workers)	$ 41,527	$ 45,258	$ 49,206
Management occupations	$ 54,677	$ 54,150	$ 59,347
Business, finance, administration	$ 38,264	$ 49,206	$ 48,909
Natural and applied sciences	$ -------	$ 77,646	$ 68,334
Health occupations	$ 60,451	$ 54,783	$ 60,459
Education, law, social, government	$ 50,434	$ 58,752	$ 63,798
Art, culture, recreation and sport	$ 29,274	$ -------	$ 43,062
Sales and service occupations	$ 24,306	$ 28,263	$ 29,927
Trades, transport, equipment operators	$ -------	$ 39,594	$ 47,887
Primary occupations (natural resources)	$ -------	$ -------	$ 75,137
Manufacturing and utilities occupations	$ -------	$ 47,872	$ 41,461

Even when comparing full-time, full-year earners, men make considerably more than women in the same occupational categories, except for in the Manitoulin District where women (for all occupations) have higher median employment income than men. Generally, residents of Greater Sudbury earn more than those in the Manitoulin or Sudbury Districts. The largest median income figure is for males living in Greater Sudbury working in primary occupations (natural resources, which includes mining, and agriculture). Sales and service occupations represent the lowest median incomes for males and females across the area (except for the unusually low incomes for males in management occupations in the Manitoulin District).

Table 7 presents the comparative median employment (fulltime; full-year work) income by industry and by gender. In this instance, only the data for the entire WPMS is shown, as figures are less reliable for the Districts of Sudbury and Manitoulin due to smaller populations.

Table 7: MEDIAN EMPLOYMENT INCOME, BY INDUSTRY AND BY GENDER, FULL-TIME FULL-YEAR EMPLOYED RESIDENTS IN WPSM AREA		
	MALES	**FEMALES**
ALL INDUSTRIES	**$ 67,665**	**$ 48,426**
Agriculture, forestry, fishing, hunting	**$ 17,185**	**$ 12,153**
Mining and oil and gas extraction	**$ 105,725**	**$ 90,988**
Utilities	**$ 92,885**	**$ 72,103**
Construction	**$ 63,544**	**$ 42,628**
Manufacturing	**$ 74,831**	**$ 49,354**
Wholesale trade	**$ 61,831**	**$ 49,017**
Retail trade	**$ 43,172**	**$ 31,846**
Transportation and warehousing	**$ 60,958**	**$ 46,622**
Information and cultural industries	**$ 62,855**	**$ 50,808**
Finance and insurance	**$ 69,953**	**$ 47,167**
Real estate and rental and leasing	**$ 58,716**	**$ 35,810**
Professional, scientific, technical	**$ 76,265**	**$ 47,651**
Management of companies	**$ 115,246**	**$ -------**
Administrative and support	**$ 42,600**	**$ 32,897**
Educational services	**$ 81,835**	**$ 74,370**
Health care and social assistance	**$ 64,562**	**$ 50,317**
Arts, entertainment and recreation	**$ 42,809**	**$ 38,846**
Accommodation and food services	**$ 28,022**	**$ 24,160**
Other services	**$ 48,032**	**$ 32,171**
Public administration	**$ 73,406**	**$ 55,813**

Clearly, the highest paying industry in the local area is *Mining and Oil and Gas Extraction*. While *Management of Companies* reports a higher amount, the number of individuals in this category is small (N=40). The other two highest paying industries are *Utilities* and *Educational Services*. The *Agriculture, Forestry, Fishing & Farming* sector has by far the lowest median income. For females, other sectors with lower pay are *Accommodation & Food Services*; *Retail Trade*; *Other Services*; and *Administrative & Support* (all under $35,000). For males, the next lowest paying industry is *Accommodation & Food Services*, followed by *Administrative & Support; Arts, Entertainment & Recreation*; and *Retail Trade* (for the later three, the income levels are just slightly above $40,000).

Other Labour Market Research at WPSM

WPSM is actively engaged in conducting other forms of research such as analyzing data provided by other sources and/or conducting independent research. To download some of these reports or for more information go to www.planningourworkforce. Here is a sample of several more current research initiatives:

JOBS PROJECTED TO GROW/DECLINE

WPSM uses data from EMSI analyst, an economic modelling tool that is available through a licence held by Ontario's Ministry of Agriculture, Food and Rural Affairs (OMAFRA). EMSI analyst (which uses a number of data sources, including historical data) can be used to identify the number of people in each occupation, their salary (except those who are self-employed) and which jobs are projected to grow/decline. This data can be further broken down by various geographic areas and while it is impossible for projections to be 100 % accurate, it does provide a sense of occupations that may/may not be in demand in the future. Of course, this data cannot be viewed in a vacuum. Unforeseen influences such as a drop in the global price of nickel, tariff changes, new funding, and other factors can dramatically increase/decrease demand for specific occupations. A good example of this is the increased demand for Personal Support Workers (PSWs). While EMSI data does not show this as a growth occupation, local consultations and other factors (such as low wages, precarious work and declining PSW graduates) show that demand is very high and various healthcare agencies that rely on PSWs are looking at ways to mitigate some of these concerns.

SKILLED TRADES WORKFORCE

Various industries are concerned about shortages in the skilled trades and with good cause. WPSM analyzed data from the Ontario College of Trades (OCoT) re: age, number and gender of journeypersons in the compulsory trades and all apprentices who are required to register with OCoT. Two time periods were chosen to determine any changes: March 2016 and June 2018. Several things should be pointed out: journeypersons in the voluntary trades are not required to register so little data exists on this segment of the trades workforce and, with the new provincial Conservative government, OCoT is slated to be dissolved which means it is not clear if/where data that does exist, will be preserved. Reports analyzing local data are available on the WPSM website and include trends re: the aging skilled trades workforce (those eligible to retire); the decline in number of apprentices; the underrepresentation of women in all skilled trades except for *Hairstylist;* and the low number of workplaces (that rely on the skilled trades) that hire/train apprentices.

ONLINE JOB POSTINGS

WPSM subscribes to data from *Vicinityjobs* which collects online job postings across various online job posting websites. According to *Vicinityjobs*, data that they collect represents approximately 50-55% of available jobs as a number of employers continue to use other recruitment methods such as "word of mouth" or only post jobs on their website. For Greater Sudbury, 8,091 jobs were posted online in 2017 and 10,599 in 2018; for the Sudbury District, 315 jobs were posted in 2017 and 353 in 2018; and for the Manitoulin District, 128 jobs were posted for 2017 and 193 in 2018.

EMPLOYER SURVEYS

For several years WPSM and other workforce planning boards in the north have surveyed employers to better understand their hiring practices. Local survey results are available on the WPSM website, but perhaps most notable is that many employers continue to use "word of mouth" as their top recruitment strategy and that "work ethic" is the number one competency they are looking for in an employee.

EO DATA (2017-18)

DATA LIMITATIONS

Generally, EO data is presented in an aggregated format for the WPSM catchment area to protect client confidentiality and is suppressed when the number of clients is too small for one specific category.

An ongoing challenge has been the broad age-specific categories used by MTCU.

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

Client numbers are declining across most EO programs.

*****

GEOGRAPHIC AREAS REPORTED

Greater Sudbury
Manitoulin District
Sudbury District

NORTHERN REGION

all of northern Ontario (includes WPSM data)

PROVINCE

all of Ontario

*****

Employment Ontario (EO) Programs and Services

BACKGROUND

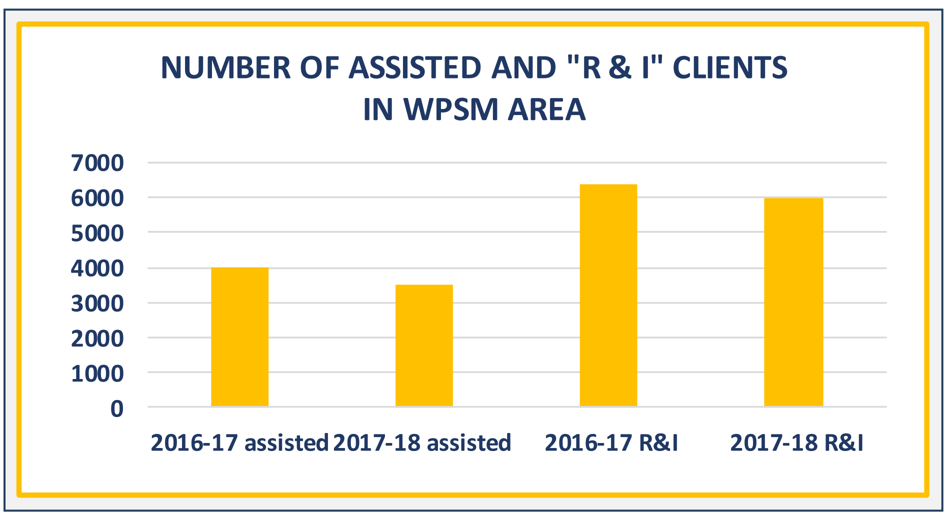
For this labour report we continue to provide data from MTCU on the following EO services: Employment Services; Literacy and Basic Skills; Second Career and Apprenticeships. We also include a summary of consultations conducted with service providers on topics such as: employment trends; what industries are hiring and for what kinds of jobs; how they find out who is hiring; what resources/services they use to help clients and employers; why client numbers are going down; greatest challenges/barriers impacting on clients; and what has been most successful in helping clients and employers.

EMPLOYMENT SERVICES (ES) DATA

Employment Services are provided across our geographic area and offer a range of services to assist clients with finding a job. Each location also has a resource centre where job-seekers can drop in and receive assistance with resumes, online job applications and various government forms; and access job boards, computers, job search sites, and other resources. ES data includes the number of clients who register as a client and a count of *unassisted* clients who do not register as a client but use ES services. MTCU names them R&I (resource and information) clients.

ES also provides Human Resources (HR) assistance to employers (i.e. screen/review applicant resumes; conduct interviews; etc.) however MTCU does not track this information.

ES CLIENTS

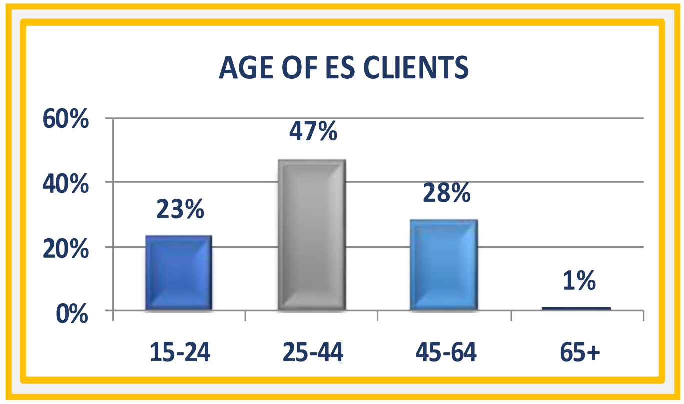


ES clients (both those who register and those who don't) have declined once again this year. Local EO Service Providers feel this decrease may reflect changing demographics, job-seekers self-serving (surfing job boards and online job postings at home), lack of promotion of EO services, and use of other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

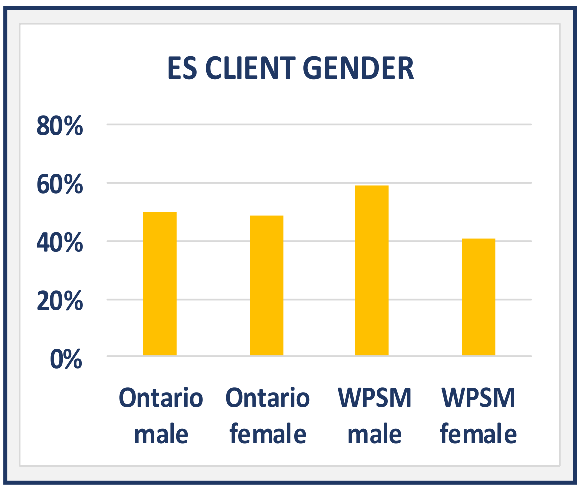
ES CLIENTS BY AGE GROUP

There have been some minor changes to the age of ES clients between 2016-17 and 2017-18: a small decrease in those who are 15-24 and 65+; and a slight increase in those 25-44 and 45-64.

As previously noted in the limitations section, ES Service Providers continue to highlight that MTCU 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 male and female. A new category has been added to include those who disclose they are *transgendered,* and across Ontario 218 clients did (resulting in less than 1% of all ES clients across Ontario) with none in the WPSM area. Across the WPSM area more males use ES than females. Local ES providers continue to feel that more males use ES for the following reasons:

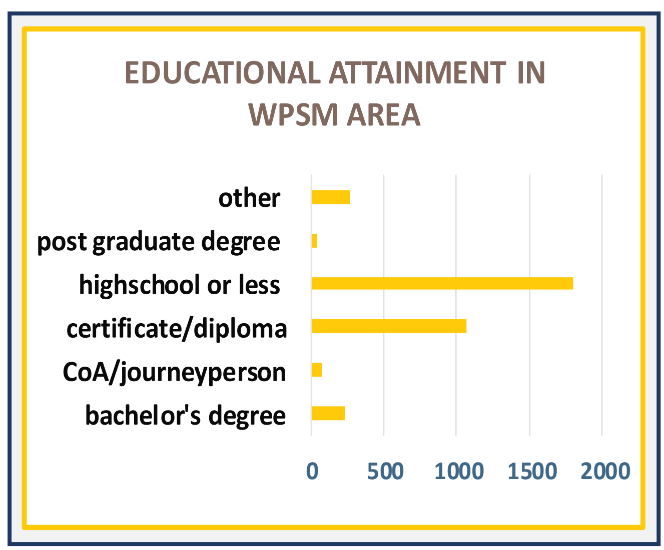
- lost/left their job (restructuring, lay-offs, quit or retired) and need/want to work;
- want to retrain to improve future prospects;
- want to supplement their retirement income; and
- are bored with retirement and want to continue working (however they may face an age bias by employers).

ES CLIENTS BY EDUCATIONAL ATTAINMENT

It is well acknowledged that lower education levels result in higher levels of unemployment and underemployment. In the WPSM area, just over 50% of all ES clients only have high school or less and 659 of those clients have less than grade 12.

Educational attainment of ES clients across the WPSM Board area is somewhat similar to northern Ontario and the rest of the province, except that fewer ES clients in the WPSM area and northern Ontario have a university degree.

When ES providers assess educational attainment, they also assess for transferrable skills and skills that may be outdated or no longer relevant in today's labour market.



DESIGNATED GROUPS:

When a client registers with ES, they are asked if they want to self-identify that they belong to a designated group. From the 3,489 people that registered as a client with ES in 2017-18: 546 identified as Aboriginal; 683 as Francophone; 107 as Internationally Trained Professionals; 122 as Newcomers; 353 as a Person with a Disability; and 109 as a Visible Minority. In other words, 55% or 1,920 identified with one of the designated groups listed by MTCU.

OUTCOMES AT EXIT

Employment Services are expected to meet a quota regarding the number of clients who exited their services to employment, education, and/or training. The breakdown of outcomes at exit for ES clients for 2017-18 is as follows: 2,230 exited to employment (full-time, part-time, as an apprentice; or several jobs); 76 exited to employment and education/training; 519 went into education or a training program; 104 were unable to work; 236 remained unemployed and the remainder fell into the categories of: independent; volunteer, or unknown.

LITERACY AND BASIC SKILLS (LBS) DATA

Literacy and Basic Skills programs[1] 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 become more independent). LBS services are offered in a variety of ways (tutors, one-on-one, small groups, e-learning) and in various locations across Ontario.

The total number of learners for 2017-18 for the WPSM area was 1,380 clients, with 899 as new in-person learners. Similar to previous years, slightly more women (52%) use LBS services. In terms of age, 37% (n=509) of LBS clients in the WPSM area were between 15-24 years of age; 41% (n=566) were between 25-44 years of age; 19% (n=263) were between 45-65 years of age; and only 4% (n=50) were 65 and older.

LBS clients are also asked at intake about their *Learner Goal Path.* 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: 565 for post-secondary; 333 for employment; and 99 for independence. The greatest changes in the *Learner Goal Path* from 2016-17 to 2017-18 are with clients who are using LBS services for an apprenticeship or to obtain a high school credit. In 2016-17, 73 learners identified apprenticeships and in 2017-18, that number was 112. Learners who wanted to obtain a high school credit jumped from 33 in 2016-17 to 279 in 2017-18. It is not clear why this number increased significantly but obtaining a high school diploma is key to many career occupations (including the skilled trades) and training programs.

SECOND CAREER (SC) DATA

Second Career 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 college or university graduates are not eligible.

In 2017-18, the number of SC clients in the WPSM area declined to 241 clients (down from 312 the previous year). This follows a similar decline across the province from 7,158 clients in 2016-17 to 5,379 clients in 2017-18. As in the past, most clients are under the age of 45 (n=173), and in the WPSM area, there has been a drop in the number of female clients (n=88) representing only 37% of all SC clients. As in previous years, most clients have been out of employment/training for less than 3 months.

[1] *for a full description of services, go to MTCU website at: http://www.tcu.gov.on.ca/eng/eopg/programs/lbs.html*

Second Career is focussed on high-demand jobs. Transport truck driver continues to be the career most in demand with 47 clients being approved for skills training programs. Only 83 SC clients went on to employment when they exited the program.

APPRENTICESHIP DATA

As noted below, the number of new and active apprentices continues to decline across the WPSM area. Interestingly, however, new and active apprentices have remained fairly stable across northern Ontario and the rest of the province over the last two years.

TOP 10 NEW APPRENTICESHIP REGISTRATIONS AND NUMBER OF REGISTRATIONS	
SKILLED TRADE FOR APPRENTICE REGISTRATIONS	NUMBER OF REGISTRATIONS
Heavy duty equipment technician	89
Automotive service technician	72
Electrician/construction & maintenance	58
Powerline technician	52
Truck & coach technician	50
Industrial mechanic millwright	47
General carpenter	44
Hairstylist	36
Industrial electrician	36
Construction craft worker	24
Child development practitioner	23

It is hard to say why the numbers are persistently declining in the WPSM area (and not the rest of northern Ontario or the province), however various reasons are cited such as: 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; and loss of trade shops in high schools that provided exposure to the trades.

In the past, varying journeyperson to apprenticeship ratios were also considered by some as a significant impediment to the skilled trades. However, with the recent government change to not only eliminate the Ontario College of Trades but also reduce all ratios to 1:1, it will be important to keep an eye on this to see if this change has an impact on new and active apprentices in the future.

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 and 26 respectively which may indicate students have already entered the workforce but are returning for trades training.

NEW & ACTIVE APPRENTICES (2015-2018)			
	WPSM	NORTHERN	ONTARIO
New 2015 - 16	818	2,192	25,793
New 2016 - 17	726	1,968	24,890
New 2017 - 18	654	1,924	24,991
Active 2015 - 16	2,312	6,638	78,959
Active 2016 - 17	1,893	5,477	69,945
Active 2017 - 18	1,706	5,639	69,576

WORKPLACE GRANTS AND INCENTIVES

Various funding opportunities, incentives and wage subsidies are available through Employment Ontario and can be found at: https://www.ontario.ca/page/employment-ontario. Local data for 2017-18 for two programs, the Canada Ontario Job Grant and Youth Job Connection are provided here.

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 MTCU website).

EO data from 2017-18 provides a quick snapshot of employers who applied for and took advantage of the Canada Ontario Job Grant[2] (COJG). In the WPSM area, in 2017-18, 171 employers received the COJG which resulted in workplace training for 825 workers. In Ontario, the number of employers that received the COJG dropped from 6,316 in 2016-17 to 4,784 in 2017-18. For the province, as a result, there was a drop in the number of workers who received training from 35,680 workers in 2016-17 to 25,278 workers in 2017-18.

YOUTH JOB CONNECTION (YJC)

The Youth Job Connection[3] 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 MTCU website).

EO data from 2017-18 shows that 282 youth utilized this fund. Of those who did, 108 were female and 170 were male. For all participants, the highest level of education at intake was high school or less.

CONSULTATIONS WITH EO SERVICE PROVIDERS

Workforce planning boards are asked by MTCU to consult EO Managers and Service Providers on their thoughts about local EO data since the numbers only tell part of the story. Consultation questions and responses from these consultations are noted below:

1. What labour market trends are you seeing?

- ongoing misalignment between education and employment
- younger workers continue to "job hop"
- many entry level jobs aren't really entry level jobs as a high number of skills are required according to the job description – but wages that are paid are low
- fewer jobs in the medium-wage category, greater wage disparity
- big box corporate stores – harder to develop relationships with them re: local employment needs

2. What industries are hiring? And for what kinds of jobs?

- occupations in demand: PSWs, janitors, AZ/DZ truck drivers, law firm and insurance company investigators, and sales and warehouse employees in mining supply companies

3. How do you find out who is hiring?

- employers call job developers directly
- online career search/job posting sites (Indeed, Kijiji, Canada's Job Bank)
- company/association websites (i.e. Chamber of Commerce)
- social media
- client, agency or employer referrals (those who have been assisted in past)
- labour market reports
- cold calls/personal visits with employers
- job fairs and company expos
- word of mouth/networking
- conduct needs assessments for employers to help identify their workforce needs

4. What resources do you use to help your clients find (and keep) a job?

- wage subsidies, incentives and stipends (clothing, transportation, tools)
- labour market information/outlook reports
- provincial sites - Ontario Job Futures
- other community services such a sheltered-workshops, housing, mental health services, etc.

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[2] *For more information on the Canada Ontario Job Grant, go to: http://www.tcu.gov.on.ca/eng/eopg/cojg/*
[3] *For more information on the Youth Job Connection funding go to: http://www.tcu.gov.on.ca/eng/eopg/programs/yjc.html*

- **full suite of employment services:** mock/informal interviews; assessment; training; job postings; professional development; problem solving; job coaching; job shadowing; visits to occupation-specific training programs; advocacy; relapse plans; setting suitable job goals
- EO services provided by March of Dimes delivers additional and specialized services to help employers with clients who have more complex challenges

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; checking references; free job postings/advertising; assistance to new business starts re: type of employees needed; legislation support; mediation
    - **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/trials; sensitivity training
6. **Why do you think the client numbers are going down?**
    - people are working; unemployment rate has gone down
    - use online job sites – job surfing
    - lower birth rates/lower numbers of people looking for work
    - OSAP more flexible – grants; less demand for Second Career (too much paper work)
    - more self-directed clients – use internet, online resources and social media
    - millennials have different value when it comes to work and employment
    - lack of marketing of EO – resulting in lack of awareness re: EO and its role
    - clients have more demands and don't want traditional employment services' assistance
    - duplication of services – competition between programs
    - trades/apprenticeships are still too complicated: ratios, costs, hours required
    - younger generation taking lower paying jobs instead of following a career path
    - one specialized service said that they are not seeing a decline in their client numbers
7. **What challenges have you seen in your clients in the last 2 years?**
    - limited financial resources, but some require lots of supports which are not funded
    - client is extremely barriered - very complex life issues including persons with physical disabilities, clients with mental health problems, anxiety, PTSD, addictions, developmental disabilities (and impact of closing sheltered workshops)
    - age – cultural shift; lack of motivation; want to work less hours for more money; unaware of their skill set; hard to get into the EO office; parents still helping with support
    - lack of transportation; cannot afford a driver's licence; too anxious to get a licence or drive
    - unrealistic expectations
8. **What are the greatest challenges for EO services?**
    - **reduced client numbers:** changing demographics; those who self-serve or only use the internet to look for work; job-seekers who give up looking
    - **need for specialization:** become more specialized (i.e. youth, older adults, newcomers, etc.), more client assistance with online systems; more job flexibility and "wrap-around" services
    - **lack of funding to promote EO programs/services:** no money available to inform job-seekers and employers about EO programs/services; need to rebrand and advertise
    - **ministry quotas and targets:** still driven by quotas (meaningless numbers); duplication of services; don't share information (i.e. job postings, employers, etc.); no credit/quota for employers assisted or HR services provided; timeframe to assist some clients too short; use of social media responses not counted in quota; challenge to classify clients (i.e. age categories still too broad); lack of accommodation supports (limited vision, reading ability, etc.) as everything is online

- **perception:** some (employers, job-seekers) see EO as a social service, not an employment service
- **other MTCU specific:** database system is challenging; expected to do more with less; myriad of programs offered and then they are gone; limited training; disparity in wage subsidies; inappropriate definition of full-time work (MTCU's definition = 23 hrs/week; definition by other provincial and federal government department's such as EI = 30 hrs/week)
- **resource centres:** feel resource centres are stable and well used, but not acknowledged by MTCU

Action Plan Update

Each year, MTCU asks all workforce planning boards to include an update on some of the activities that they support in local communities and to identify those planned for the next three years, though this is subject to change. WPSM information on local activities and partnership projects (required by MTCU as part of the annual Operating Agreement) is also included. More information on local partnerships can be found on the WPSM website. More information on these and other partnerships across all workforce planning boards in Ontario can be found at: http://www.workforceplanningontario.ca/.

PRIORITY #1: support local labour market-related initiatives

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
Chamber of Commerce - workforce-related taskforces/roundtables	Greater Sudbury Chamber of Commerce (GSCC) and business-related members	**Ring of Fire Taskforce:** Continue to participate on taskforce advocating for northern workforce and business development strategy for the Ring of Fire. **Roundtable/luncheons 2018-19**: local MPs (Marc Serre and Paul Lefebvre); Mayor Bigger; Cinefest; mining company Presidents; Economic Outlook.	ongoing as relevant
Chamber of Commerce PEP conference	GSCC; SNC Lavalin; Canadian Council for Aboriginal Business	**PEP (Partnership, Employment, Procurement) conference:** Participated as a panel moderator; essay writing contest judge and co-sponsor of gala.	annual event hosted each January
Labour market information	Sudbury East Chamber of Commerce	Provide ongoing support and sharing of information on LMI issues, initiatives and resources.	ongoing as requested
Indigenous workforce development	Northshore Tribal Council	Assist where requested re: skills inventory, LMI, industry profiles and workforce succession planning.	ongoing as requested
	Kenjgewin Teg (KT)	Continue to 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 support and consultations.	ongoing as requested
	Atikameksheng Anishinabek (Whitefish)	Career fair and resources as requested.	Sept 2018 ongoing
	Wii-ni n'guch-tood Employment & Training (Wikwemikong)	LMI support and assistance with on reserve workforce-related initiatives and research	ongoing as requested
"World of Choices" event	Junior Achievement; RBC; and Cambrian College	**World of Choices – career mentoring event** (targeted grade 9 & 10 students): supported this event as part of a local committee; identified/contacted 25 mentors from various industries to participate; sponsored lunch	complete in November 2018
LaCloche and Manitoulin Business Showcase	LaCloche Manitoulin Business Assistance Corporation (LAMBAC)	Continue to support business resource showcase events to highlight local LMI and employment resource/services; participate in trade fair	spring-summer 2019 ongoing
Employer information videos	LAMBAC; Weaver Simmons law firm; Baker Tilly; Employment Services	Produce two pilot-test videos for employers on succession planning and their HR responsibilities. If successful, will continue to produce an employer video series.	March 2018 ongoing
Ontario Centre for Workforce Innovation (OCWI)	College Boreal – hub Provincial OCWI steering committee	Assist College Boreal as the Francophone hub. Participated as a provincial steering committee member bringing the views of workforce planning to the table – however recently resigned from this committee.	as requested, completed January 2019

Northern attraction and retention strategy	FedNor	Continue to support the development of this strategy with LMI and other resources.	ongoing
Immigrant – economic integration and entrepreneurship	(LIP) Local Immigration Partnership	Participate as member of the immigrant economic integration and entrepreneurship committee to develop and implement a local strategy.	ongoing
Government outreach	WPSM initiated	Presentations to local MPs, MPPs, Mayors, City Council members, 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 LCBS training. Research report complete and funding ended (end of December 2018)	project complete dissemination to May 2019
Youth roundtable	RBC	Participated in roundtable and will assist with additional information as requested in future. No further requests.	completed

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
PSW workforce taskforce	Northeast Local Health Integration Network	Participated as a member of this taskforce with local health partners. Action plan developed which was not fully supported by WPSM. NELHIN is forming an implementation committee – WPSM may be asked to assist.	action plan complete activities ongoing
Addressing shortages in the PSW workforce	Employment services – City of Greater Sudbury; local colleges; PSW employers	Conducted survey of PSW workers and survey of agencies that employ PSWs. Reports to be complete by March 2019. Results will be used to host a strategic planning session with partners to identify solutions to current/project shortages. Explore hybrid training models.	surveys complete December 2019
Women in skilled trades	Tradeswomen; educators; industry; OYAP.	Continue to support skilled trades summer camp for girls, skills competition, and other related activities. Attended women and trades event in Toronto, hosted by 3 Ontario Ministries.	ongoing
Role of immigrants and newcomers in northern economy	NPI (Northern Policy Institute)	Continue to support work of NPI re: LMI research, mentorship strategy, and other related activities.	ongoing
Apprenticeships (due to provincial government policy changes – will need to be revisited)	Area school boards (OYAP); local colleges; EO services	Develop a career pathway poster for apprenticeships based on previous poster developed and any new/relevant information. Member of Rainbow District School Board OYAP Advisory Committee.	unable to complete, ongoing
Modern Mining and Technology Sudbury (MMTS)	MMTS and various local partners	Continue to support event which provides students with exposure to the mining industry. Attend luncheon kick-off.	ongoing annual support
Construction sector jobs on municipal infrastructure projects	Northeastern Ontario Construction Association, Carpenters Union and other stakeholders	Present results of the Sector Planning Partnership report to city officials (no uptake); presented results to Municipal Advisory Committee (GSCC); continue to promote a community benefits approach to hiring local.	report complete ongoing
FONOM (Federation of Northern Ontario Municipalities) conference	The Labour Market Group and Algoma Workforce Innovation Corporation	Participated in FONOM event (attended by municipal leads such as mayors, council members, economic development, CEOs) with a display on LMI for our area. Explore all opportunities to assist municipalities with LMI realities.	September 2018 ongoing

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
Occupations projected to grow/decline	WPSM led	Continue to use OMFRA/EMSI Analyst data to identify occupations projected to grow/decline for each census area.	ongoing annual
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.	ongoing
IT sector	WPSM led	Conducted scan of various occupations in the IT sector and	

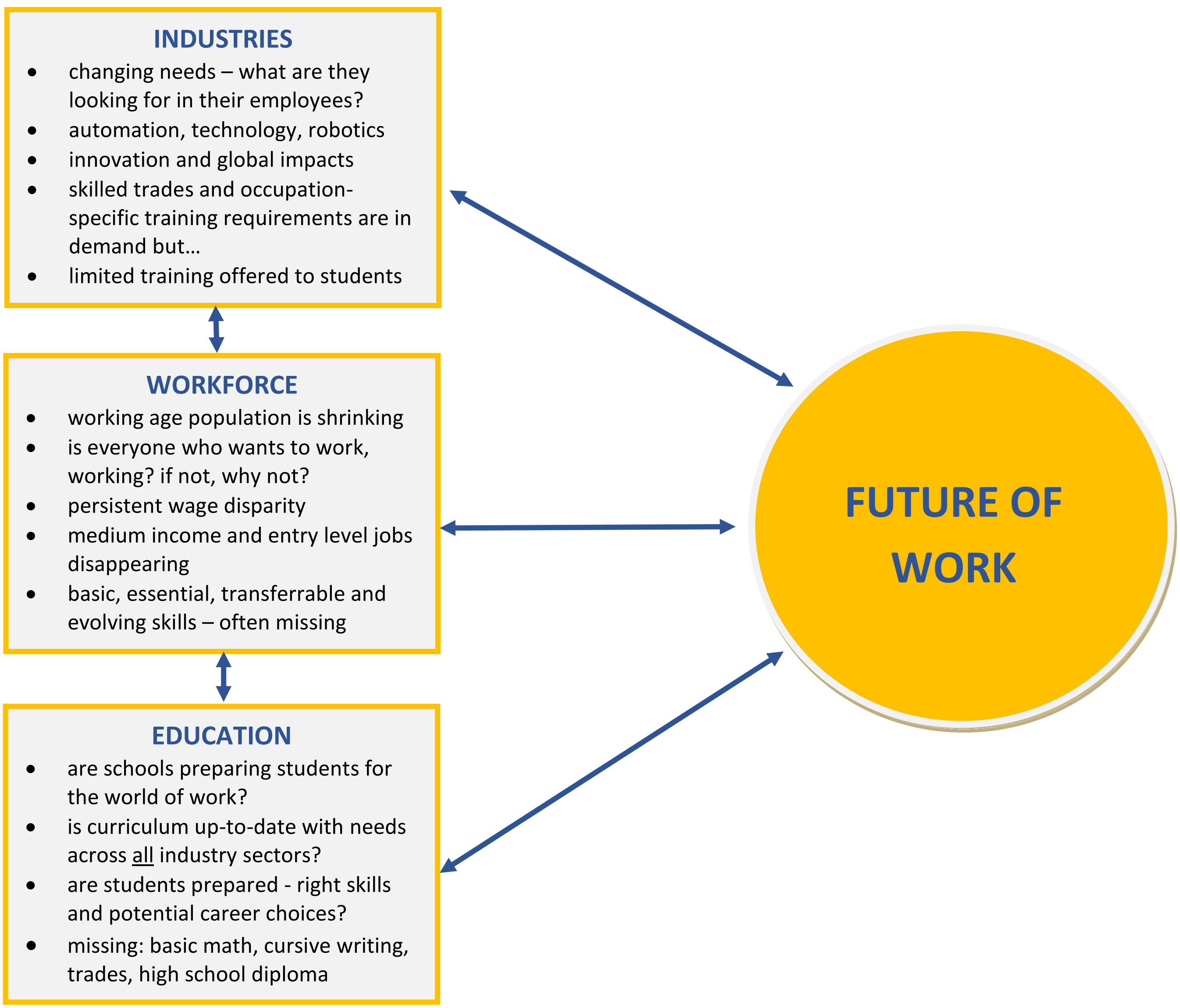
		an analysis of people currently employed in these occupations along with salary range.	complete
Agriculture	WPSM led	Participated in two food conferences and an agriculture roundtable consultation. Will continue support as relevant.	ongoing
Online Job vacancy study	Vicinityjobs.com, EO employment services, school boards, colleges	Develop quarterly reports using online job vacancy data to identify types of occupations being posted and by which industries. Complete a year-in-review report and info-graph. Add employers identified onto database and continue outreach. Share with partners on a regular basis.	quarterly September 2018 ongoing
Trades workforce research	WPSM led	Analysed OCoT data as of June 2018 re: age, number and gender of journeypersons in the compulsory trades and all apprentices in the WPSM catchment and compared results to data provided in March 2016.	April 2019
Trades industry projections research	WPSM led	Researcher conducted interviews with construction trade unions to understand current/projected workforce needs.	April 2019
Automation and technology – impact on workforce	Brookfield Institute	Assist Brookfield Institute with their consultation process and connect them with local industry leads. Participated in report consultation.	complete
Arts and culture	Provincial WIC (work in culture) committee - Ministry of Tourism, Culture and Sport	Continue to participate in meetings, roundtables and webinar discussions. 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	Championed needs of local trades employers impacted by trade ratios – with changing ratios (1:1) – may no longer be required but will provide support where needed.	support as requested

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.	complete
Apprenticeship consortium - pilot	Ontario Electrical League; Support Ontario Youth; local colleges	Participate on an advisory committee - local consortium of non-union electrical workers (and possibly HVAC).	ongoing
IT survey and training needs	NORCAT	Conduct a survey of IT employers to identify workforce and training needs on highly specific software. If funding is available, NORCAT will offer short-term (boot-camp) training to local IT employers and employees.	October 2019 ongoing
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) – industry liaison	Area school boards; post secondary institutions; and employment services	Provide opportunities to increase understanding by ECT and member organizations of the needs of employers - to help better align education with industry need. Coordinated tours with Carpenter's union hall, methane plant and water treatment and waste water plant and speaker from BMW. Future tours: Manitoulin Transport.	monthly meetings ongoing
Stellar Awards	WPSM lead; Education Coordinating Team;	Host bi-annual Stellar Awards event to recognize employers who provide exemplary learning experiences for students.	November 2018
Online job portal	City of Greater Sudbury – Economic Development; GSCC	Partner on the development of an online job portal which is free for employers to post local job postings. Participate in portal promotion to employers and analyze employer data.	December 2019 ongoing
Employment Ontario (EO) network	WPSM lead	Consultations with EO services on EO Ontario data, LMI, and EO network challenges and needs of employers and job-seeker needs. Promote EO services.	various consultations each year

Are we ready for the future?

Are we ready for the future when it comes to our workforce? This is a loaded question. First, we don't have a crystal ball and anyone that says they can predict 15-20 years out is only making an educated guess, often based on historical data and trends. Second, because many of the same challenges that we have seen over the last 10 years, continue across the labour market, however some are becoming more urgent than others. Third, we still see projected labour shortages in some skilled trades and occupations, the erosion of entry-level and middle-income jobs, wage disparity based on gender, the lack of basic and essential skills, a decline in skilled trades apprentices and a northern Ontario population that is not only stagnant but, in some cases, declining. Fourth, many communities with declining populations, still have a reluctance to look at immigrants as a way to increase their labour force, which means we will be left behind if we can't fill the jobs that are available. Last, when coupled with rapid changes in innovation, automation, robotics, artificial intelligence and other technologies across various industries, our ability to predict what jobs and skills will be needed in the future is even further stretched, and as previously mentioned, sometimes well beyond our imagination. Are we ready? – that doesn't appear to be the case.



Key Stakeholders & Resources

GOVERNMENT:
City of Greater Sudbury (Mayor and Council)
FedNor
Local MPs and MPPS
Ministry of Agriculture, Food & Rural Affairs
Ministry of Northern Development & Mines
Ministry of Training Colleges and Universities
Northeast Local Health Integration Network

LABOUR:
Various unions/locals

ASSOCIATIONS:
BuildForce Canada
CMHC (Central Mortgage & Housing Corporation)
FONOM (Federation of Northern Ontario Municipalities)
Northeastern Ontario Construction Association
Ontario Construction Secretariat
Ontario Electrical League
reThink Green
SAMSSA

INDIGENOUS ORGANIZATIONS:
Atikameksheng Anishinabek
First Nations - Economic development leads
Gezhtoojig Employment & Training
Kenjgewin Teg
N'Swakamok Native Friendship Centre
North Shore Tribal Council
Wii-ni n'guch-tood Employment & Training

INDUSTRY/BUSINESSES (in following sectors):
Architecture and Engineering
Arts and Culture
Construction
Education
Environment/Green
Health, hospitals and long-term care
Information Technology
Manufacturing
Mining and mining supply services
Retail

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 & Immigrant Services

ECONOMIC DEVELOPMENT/BUSINESS:
Greater Sudbury Development Corporation
LAMBAC
Greater Sudbury Chamber of Commerce
Sudbury East Chamber of Commerce

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

DISABILITIES:
Independent Living Sudbury Manitoulin
Accessibility Ontario

RESEARCH AND INNOVATION:
CEMI (Centre for Excellence in Mining Innovation)
Hardline Solutions
MIRARCO (Mining Innovation Rehabilitation and Applied Research Corporation)
NPI (Northern Policy Institute)
OCWI (Ontario Centre for Workforce Innovation)
SOY (Support Ontario Youth)
NORCAT

MEDIA:
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Northern Life
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