Local Labour Market Plan 2020-2021

Understanding and Adapting to our Changing Workforce Needs

Local Labour Market Plan

2020 - 2021

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. 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 services; industry leaders; educators/trainers; economic development organizations; and others to identify and address current and projected workforce issues. This report, the Local Labour Market Plan (LLMP) 2020 -2021, provides a foundation on which to build. It includes 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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Ontario

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Our Changing Labour Market

The COVID-19 pandemic caught most of us off guard and by surprise. Many of us also thought that the wave would pass in a few weeks or months and then all would return to normal. How far from the truth we were.

As the pandemic continues to this day, we could not have imagined the changes we have had to make. Everything has changed - from work, to school, to shopping, to travel and how we socialize and spend our money. A TD economist recently said that as Canadians we are saving more than we ever have partly out of fear, mandated closures, online shopping, and really, nowhere to go.

This local labour market report falls into the middle of on-again/off-again mandate closures, stringent public health guidelines regarding mask wearing, social distancing and increased cleaning practices, and a second wave of infections.

Some of the impacts on the labour market were immediate, particularly for those businesses that shuttered and could not survive the initial storm. This meant layoffs for employees they might have had, some of which have become permanent. Many of these people are looking for work and may need to retrain for another occupation.

Other employers are continuing to go full steam ahead through the storm and, as reported in our local COVID-19 business impact surveys, almost all have reported financial losses and changes in the way they do business. Some services have remained essential and in our area that includes some health and long-term care facilities, grocery stores, pharmacies, liquor stores, mining and mining supply services and others.

Everyone however has had to adapt in terms of how they do business. As public health restrictions continue, many businesses remain closed to the public, staff are working from home and all contact is done virtually (phone, online, email). This has been a significant challenge for those who are used to having a public face where people could simply walk in and do business. Some of these companies are using the funding supports that have been made available and many are now developing a website so that they have an online presence. This means learning new technologies to stay connected with their supply chain and their customers/clients.

Although many companies were already moving in that direction, the pandemic accelerated the immediate need to do so. All of these necessary adjustments increased demand for ICT (information, communications and technology) specialists, cleaners, security guards, truck and delivery drivers and of course healthcare staff.

The toll this pandemic has had on those who have contracted the virus, their families, the tragic loss of life and the impact on those who care for the ill, is unimaginable. There is no question. We are all tired of what is happening, and while the rollout of a vaccine will help, it isn't over yet.

This pandemic has completely changed the world of work. Working remotely from home has become the norm for some occupations and it is hard to say if we will ever go back to working in an office the way we did in the past. This has had a ripple effect on all services that rely on people going to and from work. This includes rental space, travel and accommodations, service stations, restaurants, hair salons and boutiques, clothing stores, and others.

More women are staying home if they can; those with children were significantly impacted as childcare facilities and schools were closed and are now reopening with new restrictions. Some have chosen not to send their children to school to risk exposure and schools have tried to adapt with hybrid teaching models (in-class and online). All post secondary institutions are completely online.

For those who already had pre-existing health challenges and those with mental health issues, the pandemic has understandably increased their level of fear and anxiety. This has had a debilitating affect on their ability to work.

So, as we continue to move through this pandemic, it will be a while before we see the true impact that it has had on every aspect of our lives and the world of work. For now, all we can do is continue to respect the guidelines, continue to support local businesses and minimize the risk of contributing to further outbreaks.

DATA OVERVIEW

WPSM BOARD AREA
Greater Sudbury
District of Manitoulin
District of Sudbury

Information on changes across various industries and LMI for each census area is provided where available.

2016 Census data is becoming outdated and use of this data is limited in this report.

For smaller communities, some ***Employment Ontario (EO)*** data may be suppressed and presented in aggregate form to ensure privacy.

Local data on the demand and supply side is further supplemented by other research and consultations with key stakeholders.

The WPSM Board of Directors provides valuable LMI – Directors are from local unions, businesses and those representing industry, employment services, education, and diversity.

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

About this Report

OVERVIEW

The mandate of Workforce Planning for Sudbury & Manitoulin (WPSM) is to identify labour market changes, trends and issues that impact on local economies, workforce development, business growth, training, and employment.

In this report, Labour Market Information (LMI) from data sources such as Statistics Canada and other valid research reports are highlighted. This data is supplemented by research that WPSM conducts and consultations with key stakeholders. This includes local businesses and industry leaders and associations, employment services, economic development leads, educators, government representatives and others.

It is important to keep in mind however that COVID-19 has presented us with a significant challenge not only for this report, but for labour market research in general. Emerging trends, labour market expectations and planning based on traditional sources is being challenged. As a result, it will be even more challenging to predict what jobs will be needed, what impact technology will have, how many businesses can adjust and how many will simply close.

DEMAND SIDE

When looking at the labour market, it is important to examine both the demand and supply side. The ***demand side*** includes industry changes, demand for certain occupations and skill sets as well as the needs of employers. Sometimes this is out of sync with the supply side - in other words, the people looking for or available for work.

SUPPLY SIDE

Data from the ***supply side***, in other words, who is currently working, looking for work or not working is included. Sources include: reports produced by *Statistics Canada* and data from *Employment Ontario (EO)* which is funded by the Ministry of Labour, Training and Skills Development (MLTSD). As noted, matching training and jobseekers with industry needs is complex and can be challenging as expectations from the supply and the demand side are not always in concert with one another.

ACTIONS

This report also provides a brief summary and status update of the many labour market activities that WPSM currently supports in local communities and expected activities over the next few years. This by no means represents the many other organizations that are also involved in workforce development and growth at various levels.

Labour Market Information - Indicators

CENSUS AREA

As noted, workforce planning boards across Ontario are responsible for analyzing local LMI data for their area. WPSM is responsible for the following census areas: 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 rebranded several years ago and the data is now called ***Canadian Business Counts***. The analysis in this report relies on data from June 2020.

CENSUS DATA

Every 5 years, Canada carries out a national survey, the most recent being 2016. The Census seeks to collect population data (number of persons, gender, age, and other demographic features) on each individual in Canada.

Unlike the previous census in 2011 where the voluntary extended questionnaire yielded low response rates, the 2016 census included a mandatory long-form questionnaire and was administered to one out of every four households, resulting in a very big sample.

The next census will be held in 2021 and it will give WPSM, researchers and others the ability to see population and demographic changes over time.

This year, due to COVID-19, Statistics Canada has issued the following statement:

"The June 2020 counts cannot be used to measure the impacts of the COVID-19 pandemic. These figures continue to include most businesses that closed in the months since the crisis began. Those that close permanently will eventually cease to be included, once business wind-down and closeout procedures are completed and confirmed, which can take several months."

DATA LIMITATIONS

Greater Sudbury is a designated CMA or Census Metropolitan Area (population is greater than 100,000). As a result, LMI data is readily available. However, that is not the case for the Sudbury and Manitoulin Districts. For smaller population areas, when the data is dissected, the results become less reliable, not because of the sample but because of how Statistics Canada presents the data. With small datasets (less than 10), data is randomly rounded to end with either "0" or "5" and as a result, is not as helpful when trying to understand labour market challenges specific to smaller communities across the Districts.

Greater Sudbury

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 1a – GREATER SUDBURY
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
(JUNE 2020)

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	65	10	7	5	1	0	0	88	1	18
21 Mining	60	11	8	6	4	4	14	107	1	17
22 Utilities	10	3	4	0	1	1	0	19	0	19
23 Construction	570	259	113	64	58	18	9	1091	10	3
31-33 Manufacturing	95	45	33	34	33	6	10	256	2	12
41 Wholesale Trade	118	68	55	62	38	11	7	359	3	10
44-45 Retail Trade	337	170	203	153	89	34	16	1002	9	5
48-49 Transportation/Warehousing	189	47	16	24	14	8	3	301	3	11
51 Information and Cultural	73	29	10	9	11	4	2	138	1	16
52 Finance and Insurance	667	78	39	36	18	5	3	846	7	7
53 Real Estate, Rental, Leasing	2624	175	31	20	19	3	0	2872	25	1
54 Professional Scientific Tech	646	220	60	48	30	9	5	1018	9	4
55 Management of Companies	131	8	4	4	6	0	0	153	1	14
56 Administrative Support	173	73	43	37	23	13	9	371	3	9
61 Educational Services	84	19	13	5	7	3	8	139	1	15
62 Health Care & Social Assistance	560	296	114	93	60	16	22	1161	10	2
71 Arts, Entertainment, Recreation	110	32	18	17	10	3	3	193	2	13
72 Accommodation & Food	104	60	63	85	84	28	6	430	4	8
81 Other Services	437	235	110	47	30	4	4	867	8	6
91 Public Administration	0	1	1	0	1	2	1	6	0	20
CLASSIFIED BUSINESSES	7053	1839	945	749	537	172	122	11417		
Percentage of all classified and unclassified businesses	64%	16%	8%	6%	4%	1%	1%	100%		
Cumulative percentage	64%	80%	88%	94%	98%	99%	100%			
ONTARIO percentage of classified and unclassified businesses	70%	18%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts June 2020
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 2019 – JUNE 2020)							
NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing and farming	1	2	-1	0	2	88
21	Mining and oil and gas extraction	-2	1	1	1	1	107
22	Utilities	-3	1	0	0	-2	19
23	Construction	-65	7	7	-3	-54	1091
31-33	Manufacturing	-1	-1	-2	2	-2	256
41	Wholesale trade	-9	-12	8	-2	-15	359
44-45	Retail trade	-15	-15	4	0	-26	1002
48-49	Transportation and warehousing	-29	-2	3	-1	-29	301
51	Information and cultural industries	1	3	-2	1	3	138
52	Finance and insurance	-30	-12	-1	-1	-44	846
53	Real estate and rental and leasing	126	3	-4	0	125	2872
54	Professional, scientific and technical services	-46	-3	6	-1	-44	1018
55	Management of companies and enterprises	1	-2	3	0	2	153
56	Administrative and support	6	8	6	-3	17	371
61	Educational services	3	-1	0	-1	1	139
62	Health care and social assistance	7	2	1	0	10	1161
71	Arts, entertainment and recreation	2	-4	-2	2	-2	193
72	Accommodation and food services	-4	2	-9	3	-8	430
81	Other services	-15	3	-4	0	-16	867
91	Public administration	0	0	0	0	0	6
	TOTAL NET CHANGES 2019-2020	-72	-20	14	-3	-81	11417
	TOTAL NET CHANGES 2018-2019	138	28	14	23	203	11498

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2020
Green indicates an increase in number of firms; red indicates a decrease; "0" indicates no change

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

In Greater Sudbury, a number of sectors experienced a loss of firms in the 100+ employees range, but in almost every instance that same sector had an increase in the number of firms with 20-99 employees. This simply suggests a decline from one size category to the next (as opposed to the "loss" of a firm). The one exception is in the Finance & Insurance sector, which had declines in all firm-size categories.

Similarly, among several sectors, there was an increase among firms with 100+ employees, almost always with a corresponding decline among firms with 20-99 employees, suggesting a growth of employment that moved an establishment from one size category to the next. The one exception was Mining & Oil and Gas Extraction, which had a net increase in each category of firms with employees.

District of Manitoulin

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 2a – MANITOULIN DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
(JUNE 2020)

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	105	14	3	3	0	0	0	125	12	2
21 Mining	3	1	0	0	0	0	0	4	0	20
22 Utilities	14	0	1	0	0	0	0	15	1	15
23 Construction	62	37	10	10	0	0	0	119	11	3
31-33 Manufacturing	15	5	3	3	0	0	0	26	2	12
41 Wholesale Trade	7	4	1	0	0	0	0	12	1	17
44-45 Retail Trade	49	32	26	12	5	3	0	127	12	1
48-49 Transportation/Warehousing	28	13	2	4	4	1	1	53	5	9
51 Information and Cultural	4	7	1	1	0	0	0	13	1	16
52 Finance and Insurance	23	9	6	0	0	0	0	38	4	10
53 Real Estate, Rental, Leasing	96	9	0	0	1	0	0	106	10	4
54 Professional Scientific Tech	49	27	0	0	0	1	0	77	7	7
55 Management of Companies	8	1	0	0	0	0	0	9	1	19
56 Administrative Support	12	10	4	0	0	2	0	28	3	11
61 Educational Services	4	3	2	0	0	0	1	10	1	18
62 Health Care, Social Assistance	21	14	8	9	7	3	3	65	6	8
71 Arts, Entertainment, Recreation	18	6	1	0	1	0	0	26	2	12
72 Accommodation & Food	55	19	18	6	3	2	0	103	10	5
81 Other Services	44	28	6	2	1	3	0	84	8	6
91 Public Administration	0	0	1	2	8	4	2	17	2	14
CLASSIFIED BUSINESSES	617	239	93	52	30	19	7	1057		
Percentage of all classified and unclassified businesses	59%	22%	9%	5%	3%	2%	1%	101%		
Cumulative percentage	59%	81%	90%	95%	98%	100%	101%			
ONTARIO percentage of classified and unclassified businesses	70%	18%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts June 2020
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 2019 – JUNE 2020)							
NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing and farming	-8	0	0	0	-8	125
21	Mining and oil and gas extraction	0	0	0	0	0	4
22	Utilities	0	1	0	0	1	15
23	Construction	-3	1	0	0	-2	119
31-33	Manufacturing	1	3	-2	0	2	26
41	Wholesale trade	-7	1	0	0	-6	12
44-45	Retail trade	5	1	-1	0	5	127
48-49	Transportation and warehousing	-3	0	0	0	-3	53
51	Information and cultural industries	-2	1	0	0	-1	13
52	Finance and insurance	0	1	0	0	1	38
53	Real estate and rental and leasing	-5	-4	0	0	-9	106
54	Professional, scientific and technical services	-4	3	0	0	-1	77
55	Management of companies and enterprises	0	0	0	0	0	9
56	Administrative and support	0	1	-1	0	0	28
61	Educational services	2	0	0	0	2	10
62	Health care and social assistance	-1	-1	-2	1	-3	65
71	Arts, entertainment and recreation	0	1	0	0	1	26
72	Accommodation and food services	-3	-3	1	0	-5	103
81	Other services	-2	-3	0	0	-5	84
91	Public administration	-1	-1	2	0	0	17
	TOTAL NET CHANGES 2019-2020	-31	2	-3	1	-31	1057
	TOTAL NET CHANGES 2018-2019	22	2	11	-2	33	1088

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2020
Green indicates an increase in number of firms; red indicates a decrease; "0" indicates no change

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

Overall, for the Manitoulin District, there has actually been very limited change between 2019 and 2020. While the total number of firms has dropped 31, that is exactly equal to the number of fewer firms with "0" employees. Removing these from the calculation and there is no net difference in the number of firms. Indeed, among the 60 cells in the three columns of 1-19, 20-99 and 100+ employees, 37 cells have a "0", which means no net change. In comparison, the net changes between 2018 and 2019 are illustrated in the last row of Table 2b. While there was a larger change among firms with "0" employees, there also was a notable growth of 11 firms in the 20-99 employee category. On the basis of the 2019-2020 data, it would be hard to infer any net employment changes, even though it is clear from labour market data that job losses did occur during this period as a result of the pandemic.

District of Sudbury

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 3a – SUDBURY DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
(JUNE 2020)

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	88	30	4	4	1	2	0	129	9	5
21 Mining	3	4	0	0	0	1	3	9	1	19
22 Utilities	9	0	1	1	0	0	0	11	1	18
23 Construction	88	46	19	9	4	0	0	166	12	2
31-33 Manufacturing	12	5	4	4	5	3	1	34	2	12
41 Wholesale Trade	14	5	1	0	2	0	0	22	2	14
44-45 Retail Trade	56	20	38	24	9	4	0	151	11	3
48-49 Transportation/Warehousing	45	20	5	2	1	2	2	77	5	7
51 Information and Cultural	6	6	0	2	1	0	0	15	1	16
52 Finance and Insurance	41	2	6	2	3	0	0	54	4	10
53 Real Estate, Rental, Leasing	198	19	5	1	2	0	0	225	16	1
54 Professional Scientific Tech	50	11	4	3	1	0	0	69	5	9
55 Management of Companies	8	0	0	0	0	0	0	8	1	20
56 Administrative Support	26	5	5	1	1	1	0	39	3	11
61 Educational Services	11	2	1	1	0	0	0	15	1	16
62 Health Care & Social Assistance	26	25	5	10	9	0	2	77	5	7
71 Arts, Entertainment, Recreation	18	6	2	4	0	0	0	30	2	13
72 Accommodation & Food	72	35	21	11	6	4	0	149	10	4
81 Other Services	67	41	13	2	0	0	0	123	9	6
91 Public Administration	0	2	5	1	8	3	2	21	1	15
CLASSIFIED BUSINESSES	838	282	139	82	53	20	10	1424		
Percentage of all classified and unclassified businesses	60%	20%	10%	5%	4%	1%	1%	101%		
Cumulative percentage	60%	80%	90%	95%	99%	100%	101%			
ONTARIO percentage of classified and unclassified businesses	70%	18%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts June 2020
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 NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE
(JUNE 2019 – JUNE 2020)

NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing and farming	-17	2	0	-2	-17	129
21	Mining and oil and gas extraction	1	1	0	0	2	9
22	Utilities	-2	-2	0	0	-4	11
23	Construction	-9	-12	0	0	-21	166
31-33	Manufacturing	-4	2	1	-2	-3	34
41	Wholesale trade	-3	1	0	0	-2	22
44-45	Retail trade	9	-8	3	0	4	151
48-49	Transportation and warehousing	-9	1	0	0	-8	77
51	Information and cultural industries	1	1	0	0	2	15
52	Finance and insurance	-6	-2	2	0	-6	54
53	Real estate and rental and leasing	9	-4	1	0	6	225
54	Professional, scientific and technical services	-9	1	1	0	-7	69
55	Management of companies and enterprises	0	0	0	0	0	8
56	Administrative and support	-1	1	1	0	1	39
61	Educational services	3	-3	0	0	0	15
62	Health care and social assistance	2	7	-1	0	8	77
71	Arts, entertainment and recreation	-3	-2	0	0	-5	30
72	Accommodation and food services	-4	3	-2	0	-3	149
81	Other services	-9	5	-1	0	-5	123
91	Public administration	0	-2	-1	1	-2	21
	TOTAL NET CHANGES 2019-2020	-51	-10	4	-3	-60	1424
	TOTAL NET CHANGES 2018-2019	16	21	6	0	43	1484

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2020
Green indicates an increase in number of firms; red indicates a decrease; "0" indicates no change

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

Sudbury District experienced slightly more change, although most was among the smallest firms, with a net loss of 51 firms with "0" employees and a net loss of 10 firms with 1-19 employees. Among larger firm categories, the gains/losses cancel each other out - for example, an increase of four firms in the 20-99 employees range and a decrease of three firms in the 100+ employees range. Among firms with employees, almost half experienced no net change. But in comparison to the net totals highlighting changes between 2018 and 2019, the growth in the number of firms apparent last year has stalled and declined. Between 2019 and 2020, there are losses of large firms in Agriculture, Forestry, Fishing and Farming, as well as in Manufacturing. Construction appears to have experienced the largest net losses, followed by Agriculture, Forestry, Fishing and Farming. This should be a concern given that these two sectors are among the top five sectors by number of establishments in the Sudbury District.

Other LMI Data

TOP FIVE INDUSTRIES

As illustrated in Table 4 (below) Greater Sudbury has four of the same top five industries by number of businesses as Ontario (excluding Transportation & Warehousing), although in a different ranking. Manitoulin and Sudbury 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 list for Greater Sudbury. In each of these areas, the top five industries account for at least 55% of all businesses.

TABLE 4 TOP FIVE INDUSTRIES BY NUMBER OF BUSINESSES: DISTRICTS OF MANITOULIN AND SUDBURY, GREATER SUDBURY AND ONTARIO (June 2020)

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

HIGHER PROPORTION OF BUSINESSES WITH NO EMPLOYEES

Another feature of these business profiles is to note that certain industries have very high proportions of solo operators. While on average, 60-64% of businesses across the three areas have no employees, Table 5 illustrates the industries with particularly high proportions of businesses with no employees.

TABLE 5 INDUSTRIES WITH A HIGHER PROPORTION OF BUSINESSES WITH NO EMPLOYEES

Manitoulin District	Sudbury District	Greater Sudbury
Agriculture, Forestry, Fishing, Farming	Agriculture, Forestry, Fishing, Farming	Construction
Construction	Construction	Retail Trade
Retail Trade	Retail Trade	Finance & Administration
Real Estate, Rental, Leasing	Real Estate, Rental, Leasing	Real Estate, Rental, Leasing
Accommodation & Food Services	Accommodation & Food Services	Professional, Scientific , Technical
Other Services	Other Services	Healthcare & Social Assistance

Impact of COVID-19 on the local labour market

UNEMPLOYMENT

To produce more robust data, Statistics Canada uses the Labour Force survey to produce a three-month moving average of unemployment data for regions and for large municipalities. For example, a three-month moving average result for May consists of the average for May, April and March. Unfortunately, while this data is available for Greater Sudbury, unlike the census, it is not available for smaller geographic areas/communities.

As a result, in order to provide some context, Greater Sudbury's figures are compared to other parts of the province as follows: Northeast Ontario (minus the Greater Sudbury figures which accounts for roughly one-third of Northeast Ontario's labour force); the Toronto Census Metropolitan Area (CMA); and the rest of Ontario (minus the Toronto CMA numbers).

The other important fact to point out is that all parts of Ontario started 2020 with low unemployment rates, hovering around 5% in January and February. However, as one can see in Table 6, unemployment rates across Ontario have been deeply impacted by the pandemic.

TABLE 6: UNEMPLOYMENT RATE, THREE-MONTH MOVING AVERAGE, GREATER SUDBURY, REST OF NORTHEAST ONTARIO, TORONTO CMA, AND THE REST OF ONTARIO, JANUARY TO OCTOBER 2020

LOCATION	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct
Greater Sudbury	4.8%	5.5%	6.3%	7.5%	9.5%	10.1%	9.6%	8.6%	8.1%	7.2%
Rest of NE ONT	5.4%	5.0%	5.9%	7.7%	9.7%	10.1%	9.1%	8.6%	7.9%	7.8%
Toronto CMA	5.0%	5.0%	6.0%	8.0%	11.6%	13.8%	15.0%	14.3%	13.1%	11.6%
Rest of Ontario	5.0%	5.2%	6.4%	8.3%	10.6%	11.3%	10.8%	10.1%	9.1%	8.3%

Statistics Canada, Table 14-10-0095-01 and Table 14-10-0293-01

EMPLOYMENT BY INDUSTRY

Much like the data on unemployment noted above, data regarding employment is also limited; in the WPSM area, it is only available for Greater Sudbury. Although all industries were impacted by the pandemic, three were particularly impacted. They include:

1. A**ccommodation and Food Services** by far was the hardest hit sector, not only in Greater Sudbury, but across Ontario, Canada, and, indeed, the entire world. Employment in May and June fell to 45%-46% of the employment level in January, rebounded in October, but only to 80% of January's employment level.
2. **Wholesale and Retail Trade** which includes grocery stores and their supply chains increased their staffing, however, many other retail operations were closed and wholesalers for non-essential goods experienced a reduction in business. In May and June, Wholesale and Retail Trade dropped to 81-82% of its January level and by October had returned to 94% of its earlier level.
3. **Other Services (except Public Administration)**: which consists of personal care services such as hairstylists, nail salons and dry-

cleaners; repair shops, such as auto repair, appliance repair and so on; and religious, grant-making, civic and professional organizations started a slow decline which has continued since the pandemic began. Through August – October, employment levels remained around 61% of what they were in January 2020.

COVID - 19 BUSINESS IMPACT SURVEYS

The impact of the COVID-19 pandemic on local businesses and on employment can't be underscored. With mandated closures of many businesses unless deemed essential (such as mining, healthcare, grocery and liquor stores) and the growing fear of a virus that was not well understood, it has been and still is hard to quantify the impact on local businesses.

Even though Stats Canada was conducting research across the country, WPSM worked in collaboration with Greater Sudbury Chamber of Commerce and the Economic Development Department of Greater Sudbury to conduct a series of COVID-19 Business Impact Surveys in April, May and June of 2020 to better understand local impact. A report for each survey period is available on the WPSM website, but here are some highlights between April-June 2020.

- just under 800 employers from Greater Sudbury, as well as the Districts of Sudbury and Manitoulin responded – this included a wide cross-section of industries;
- as a result of mandated closures, roughly one third thought this could put them out of business; one third said it would significantly impact their financials and another third felt they could weather the storm;
- around 40% reduced hours, staff and business operations; 25-45% closed temporarily; just under half continued operations but working remotely;
- 50-70% laid off full-time, part-time, seasonal and contract employees;
- employers reported educating workers; staggering hours; asking staff to work from home; and increased cleaning/sanitization of work areas;
- almost 50% expect to remain viable; the rest said it depends on length of closures;
- 90%+ reported revenue decline; with just under one half reporting supply chain interruptions and contract delays/cancellations; and
- almost all businesses that responded said that they were aware of government financial supports, but in some cases did not qualify.

When asked what needs to be done to help with economic recovery – several themes emerged:

- *continue with government subsidies and funding supports*
- *shop local*
- *follow public health guidelines*
- *improve communication (overload of too much information and too many sources)*

Other Labour Market Research at WPSM

While COVID-19 dominated the majority of 2020 and is expected to do so for a yet unknown time into the future, WPSM continued research activities into other industry sectors. In 2019 WPSM initiated two research projects that have spilled over into 2020. Little did we know at the time that both of these research projects would contribute to our way forward as we negotiate this pandemic. This includes ongoing efforts to better understand the PSW (Personal Support Workers) workforce and the hiring practices of ICT (Information, Communications, and Technology) sector employers.

PSW WORKFORCE

The PSW workforce has largely been ignored by Ontario's health care policymakers over the last 10 years. Recommendations that were made a decade ago to improve the long-term care and homecare systems and support PSWs in their work, were not acted upon. Unfortunately, the pandemic has underscored the consequences of not paying attention, and the significant and catastrophic results that we have witnessed. It is important to say that numerous systemic factors have contributed to this.

The survey WPSM conducted of close to 90 PSWs underscored some of the challenges that many face on a daily basis. To put it in very simple terms, PSWs are a caring and compassionate workforce, but in most cases are overworked, underpaid and undervalued. Our survey showed that their work is precarious (requiring them to work at several facilities to make up full time hours); most do not receive benefits; the client (resident) to PSW staff ratio is too high; additional training to deal with the complex needs of those requiring care is minimal to non-existent; and that many PSWs plan to leave their profession over the next five years. To compound matters, enrollment rates in PSW programs is low, leaving a significant void in new PSWs or people who are willing to enter this workforce and work for low wages and under these circumstances.

Even though the health care and long-term care systems have become largely reliant on a PSW workforce, the pandemic should serve as a wake-up call. Far more needs to be done to address issues that have largely been ignored and with a pandemic that is continuing to rage on while our population is aging, there is no time to waste.

ICT/HIGH-TECH SECTOR

In the previous Local Labour Market Plan, we reported the shift that was already occurring with our increasing reliance on technology and a workforce that rapidly needs to adapt and change to meet growing demand to embrace new technology and innovations. Everything we thought we knew five to ten years ago has changed and the pandemic has added to the need to adapt and pivot quickly. Who would have thought even a year ago that many of us would be working from home, that businesses, services, education and training would need to quickly transition to an online format, and that online platforms would be our primary way to communicate and stay connected with each other?

WPSM research into the ICT/High-Tech sector was initiated in late 2019 with a final analysis and report the summer of 2020. Although only 25 businesses who represented around 330 employees responded, the results were compelling. Approximately 90% of jobs are full time, and almost all employer respondents said that over the next two years they plan to increase their workforce by 40%. The good news is that this opens the door for those wanting to work in this sector. The bad news is that employers want experienced and trained people and while they want to recruit locally, it is hard to find the talent they are looking for.

Part of this is a typical employer response that WPSM has seen over the years. Employers across almost all sectors want to hire fully trained and experienced people who also possess needed soft skills (such as communication, work ethic, and ability to adapt) and very few want to train.

This is further compounded by the sheer range of occupations in this sector - everything from an on-the-phone tech support person to a highly skilled robotics engineer. This makes it challenging when analyzing workforce demand, needs and training. Each employer has expectations regarding educational attainment, credentials and experience they require and what salary they are willing to pay.

WPSM is focussed on trying to understand the needs of this sector so that we can share this with our education and employment services partners. Our hope is to provide some guidance in terms of what specific jobs are in demand (from the high-end of the salary scale to the lower-end) to help students, graduates and those looking for work with a better understanding of what is needed to work in this sector.

Again the pandemic and the growing demand for ICT has underscored our need to better understand this sector, the needs of employers and those who rely on these services. The ICT/High-Tech sector is also engaged in significant research, development and innovation projects in mining, the environment, digital media and other specialized areas, and it will be important to keep on top of emerging trends and needs.

note: aforementioned research reports are available on the WPSM website at: www.planningourworkforce.ca

EO DATA (2019-2020)

DATA LIMITATIONS

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

Broad age-specific categories used by the ministry continue to be an ongoing challenge.

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

Client numbers are driven by program requirements and MLTSD funding.

*****

GEOGRAPHIC AREAS
Greater Sudbury
Manitoulin District
Sudbury District

*****

The full impact of COVID-19 on employment demand and outcomes will not be realized for some time to come.

Employment Ontario (EO) Programs and Services

BACKGROUND

Data for this section of the labour market report is provided to WPSM by the Employment Ontario (EO) branch of the Ministry of Labour Training and Skills Development (MLTSD). It includes data related to the following programs: Employment Services; Literacy and Basic Skills; Second Career; and Apprenticeships.

In a discussion with several EO Managers, they recommended that year-to-year data not be compared for two reasons: a) funding criteria may have varied from the previous year which in turn impacts on program delivery and outcomes, and b) even though COVID-19 restrictions were imposed at the end of the fiscal year (March 2020), this has further impacted on the ability of EO to offer the full suite of services. This of course will have a significant impact in the future as the pandemic continues.

Virtual consultations were conducted with service providers and a summary has been included. They were asked to provide their perspectives on: industry and employment trends; jobs in demand; how service delivery models have changed; and challenges/barriers impacting clients. Consultations also centred on the impact of COVID-19 on their services, staff, clients and employers and jobs that are in demand as a result.

EMPLOYMENT SERVICES (ES) DATA

Employment Services offer a range of employment-related services to assist clients with finding a job. Each location across the WPSM catchment area also houses a resource centre where jobseekers 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 individuals who register as a client and a count of *unassisted* clients who do not register as a client but use ES services. These individuals are designated as R & I (resource and information) clients.

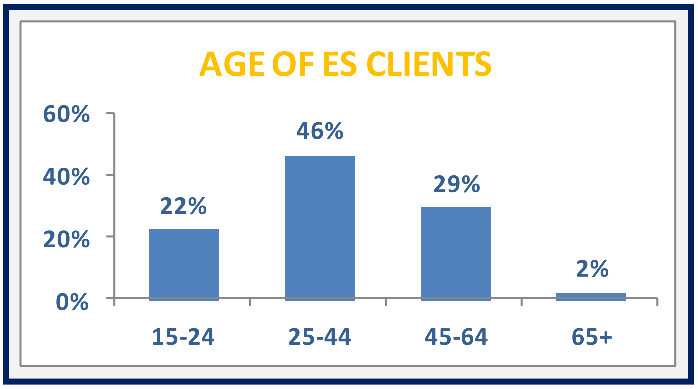
Typically, ES also provides Human Resources (HR) assistance to employers (i.e. screen/review applicant resumes; conduct interviews; etc.) however this service is not promoted or tracked by the ministry.

ES CLIENTS SERVED

Although there was a very slight decrease in overall ES clients served in 2019-20, ES provided direct service to 3,346 clients. There was also a slight increase in “unassisted R & I” clients to 8,990 clients – as a result, EO service providers in the WPSM area served 12,336 clients in total.

As in previous years, some employment service agencies reported an increase in use of their resource areas by international students, immigrants and newcomers looking for work. Some employment services also provide programs for youth, while others do not receive funding to do this. Some speculated that youth, particularly those in the 15-24 age bracket prefer to use online services and are not as interested in meeting face-to-face with an ES provider.

ES CLIENTS BY AGE GROUP



While there was a slight reduction in number of ES clients in the 15-24 age category, there was an increase in the 25-44 age category. Most other age categories remained relatively stable.

As mentioned in previous labour reports, many ES providers feel that the ministry's age categories continue to be too broad and are not consistent with the age criteria for many of their programs to draw any conclusions. This is an ongoing data challenge.

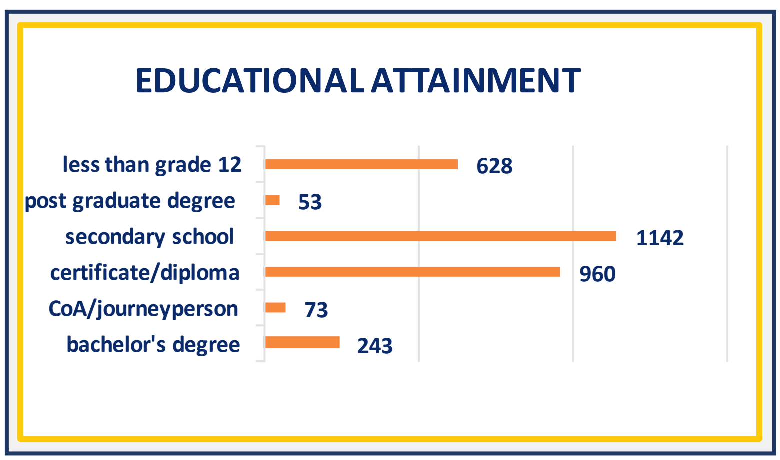
ES CLIENTS BY GENDER

Across Ontario, ES clients continue to be evenly split across male and female, however in the WPSM area, 56% of ES clients are male and 44% are female, reflecting only a slight shift from the previous year. While ES providers were not asked why there are more men than women using their services, in previous years, they noted that more males are looking for work because: they lost/left their job; need to supplement their retirement income; are bored with retirement. Additionally, more older women are now looking to supplement their retirement income which is too low to live.

As noted in the previous report, although several newer categories such as *other; prefer not to disclose* and *transgendered* were added, no one in the WPSM area identified with any of these categories.

ES CLIENTS BY EDUCATIONAL ATTAINMENT

Lower education levels result in higher levels of unemployment and underemployment. In the WPSM area, 53% of all ES clients only have a secondary school diploma or less. Along with low academic levels, many of these same clients also have other barriers to employment.



When clients are assessed for educational attainment, they are also assessed to determine what skills are transferrable or may be outdated/no longer relevant in today's labour market. This is particularly true of older ES clients.

While educational attainment of ES clients across the WPSM area is similar to northern Ontario and the rest of the province, fewer ES clients in the WPSM area have a university degree.

ES CLIENTS BY DESIGNATED GROUPS

Clients that register with ES are asked if they want to self-identify that they belong to a designated group. From the 3,346 people that registered as an ES client in 2019-20: 481 identified as Aboriginal; 595 as

Francophone; 193 as Internationally Trained Professionals; 179 as Newcomers; 415 as a Person with a Disability; and 108 as a Visible Minority. In other words, 59% or 1,971 identified with one of the designated groups as listed by MLTSD. It is important to note that the number of clients that identified as Internationally Trained Professionals, Newcomers and Visible Minority all increased, while number of clients that identified in other designated categories decreased.

ES CLIENTS BY OUTCOMES AT EXIT

Employment Services are expected to meet a quota regarding ES clients who exited ES services to employment, education, and/or training. Outcomes at exit for ES clients for 2019-2020 are as follows: 67% exited to employment (full-time; part-time; as an apprentice; self employed); of those that became employed, 15% exited to a more suitable job or in an area of training/choice; 2% exited to employment and education/training; 16% went into an education or training program; 3% were unable to work; 6% remained unemployed. All others fell into the following categories: independent; volunteer, or unknown.

LITERACY AND BASIC SKILLS (LBS) DATA

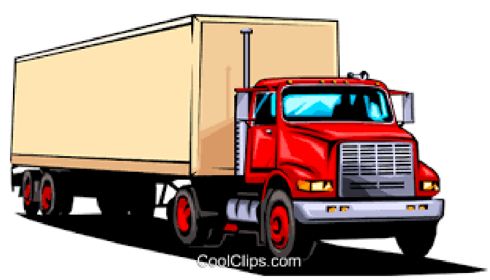
Literacy and Basic Skills programs offer free training in reading, writing, math, and basic work skills to help clients reach their goals (upgrade education or training, get a job, or become more independent). LBS services are offered in a variety of ways (tutors, one-on-one, small groups, e-learning) and in various locations across Ontario.

More information on LBS can be found on the ministry's website at: http://www.tcu.gov.on.ca/eng/eopg/programs/lbs.html.

Total number of learners for 2019-20 for the WPSM area was 1,498 (this includes new and carry-over in-person e-channel learners). As in previous years, slightly more women (58%) use LBS services. In terms of age of LBS clients in the WPSM area: 31% were 15-24 years of age; 44% were 25-44 years of age; 20% were 45-65 years of age; and 4% were 65 and older. This closely mirrors 2018-19 age categories.

During intake, LBS clients are also asked about their *Learner Goal Path.* In other words, why are they using LBS services? WPSM area clients reported the following reasons: 611 (41%) for post-secondary (represents a significant increase from the previous year); 313 (21%) for employment; 148 (10%) for independence; 98 (7%) for an apprenticeship; and 328 (22%) to obtain a high school credit. Again, it is important to point out that a high school diploma is a necessary prerequisite for many occupations and/or training programs including the skilled trades.

SECOND CAREER (SC) DATA



The Second Career program is for laid-off unemployed workers. The intent is to provide skills training to transition these people into high-skill, demand occupations in the local area. More information can be found about this program by going to: http://www.tcu.gov.on.ca/eng/eopg/programs/sc.html.

Over the last several years, the number of SC clients in the WPSM area has been declining and in 2019-20, there were only 188 clients. Similar to previous years, most clients are male (66%) and between the ages of 25-44 (59%) and been out of employment/training for less than 3 months (49%). Second Career is focussed on occupations in demand. Transport truck driver continues to be in demand with 61 clients being approved for a skills training program. Overall however, only 55 SC clients, in other words, only 29% went on to employment when they exited the program – this is a significant drop from the previous year. In past, this program was used to assist laid off workers but may be expanded due to the impact of COVID-19 on job losses.

APPRENTICESHIP DATA

While the purpose of this Local Labour Market report is to provide new local labour market information, the skilled trades issue is not new. Previous reports have highlighted significant issues related to the apprenticeship system including low enrollment rates in various trades-related programs, the low number of employers who hire apprentices and the aging demographic of current journeypersons across many trades.

NEW & ACTIVE APPRENTICES (2016-2020)			
	WPSM	NORTH	ON
New 2016 - 17	726	1,968	24,890
New 2017 - 18	654	1,924	24,991
New 2018 - 19	772	2,104	27,821
New 2019 – 20	752	2,065	26,771
Active 2016 - 17	1,893	5,477	69,945
Active 2017 - 18	1,706	5,639	69,576
Active 2018 - 19	1,746	5,254	71,279
Active 2019 – 20	1,856	5,462	73,924

For an apprentice to become a journeyperson, it takes years of practical hands-on experience under a trained and experienced journeyperson, and requires in-school learning and the successful completion of a trades exam. Although greater attention is being paid to the need to train and recruit more apprentices across most trades, many of the challenges that have been highlighted over the years continue to persist.

While there is some comfort in knowing that the current number of new and active apprentices is relatively stable, given the age of the current journeyperson workforce, it will not be enough to meet future demand.

For the WPSM area, according to the ministry's apprenticeship data, there has been a slight decrease in overall number of new apprentices from 2018-2019 to 2019-2020 and a slight increase in the number of active apprentices over the last few years.

NEW APPRENTICES TOP 10 TRADES 2019-20	
SKILLED TRADE	#
General carpenter	120
Heavy duty equipment technician	109
Electrician/construction & maintenance	76
Automotive service technician	67
Powerline technician	58
Truck & coach technician	47
Industrial mechanic millwright	44
Industrial electrician	41
Plumber	25
Child development practitioner	25

New apprentices generally enter the same top ten trades with the exception this past year of an increase in numbers for General Carpentry. This is likely reflective of the big push by the local union to recruit. This is due to large and anticipated projects that will require a significant number of carpenters. On the other end of the spectrum, there have been no new apprentices in Hairstylist or Construction Craft Worker. This is a bit more of an anomaly for which we have no explanation.

To sum up the apprenticeship picture, the government continues to be active in their attempts to "modernize" the apprenticeship system, but as noted, there are many pervasive and persistent challenges. Even the new push to explore micro-skill credentials, where someone trains and specializes in only one or two components of a trade has drawn both praise and criticism from different trades. Many changes that are being proposed have been tested in other countries around the world and it will be important to consider lessons learned from others who have evaluated whether or not these new approaches work or don't work. Only time will tell if these efforts work in Ontario.

WORKPLACE GRANTS AND INCENTIVES

Various funding opportunities, incentives, training grants and wage subsidies are available through Employment Ontario for employers. As grant and incentive criteria can change, it is best to go directly to the Employment Ontario website at: https://www.ontario.ca/page/employment-ontario to see what is available and how to access them. Grants such as the Canada-Ontario Job Grant (COJG) provide direct financial support to all businesses who want to purchase training for their staff. Information on the COJG can be found at: http://tcu.gov.on.ca/eng/eopg/cojg/. Other programs such as Youth Job Connection and Youth Job Connection Summer found at: https://www.ontario.ca/page/hire-young-person are focussed on youth.

Last year, the Youth Job Connection initiative helped 266 youth and Youth Job Connection Summer helped 112 youth in our area. Sixty-three employers took advantage of the COJG.

EO service provider consultations

While evidence-based data is important, it doesn't tell the whole story. Each year, WPSM engages local EO managers and ES providers who work directly with clients looking for work and employers looking for workers in a series of consultations. Their knowledge, insights, and on-the ground perspective are invaluable. It helps supplement data that WPSM collects and analyzes and helps us to better understand current/emerging workforce trends, issues and challenges.

As noted, the pandemic has impacted all services and sectors, including employment services across the province, country and for that matter, globe. The responsiveness of local services to continue to provide clients with the supports that they need is critical in this time of business closures, lay-offs and uncertainty.

Here are the responses that were provided during the consultations from four EO employment services – it is important to note that there is some variation in responses due to their local geography, industry profile, clientele and funding allocations received from MLTSD.

1. IMPACT OF COVID-19 ON CLIENTS

FEAR AND ANXIETY

- increase in existing/new cases of anxiety and other mental health issues – one ES provider said it well... *"COVID-19 amplified everyday life"*
- those with pre-existing medical/health issues had increased anxiety and fear about going to work and potentially being exposed to the virus
- some afraid to return to work (fear of public transportation, risk of exposure, personal safety)
- some clients such as LBS who have multiple challenges better served in person (not virtually)
- some afraid for their children re: close contact on school buses and in school

IMPACT OF CERB

- CERB (the Canada Emergency Response Benefit) was viewed as necessary to help laid-off workers due to provincially mandated closures...however, many low-waged workers who qualified for CERB did not want to go back to low-wage jobs and employers were not paying enough to attract them
- while many wanted to stay home, once CERB ended, some have returned to use ES services
- other clients on CERB were earning more than the minimum-wage work available but intended to return once benefits ended (concern re: pending tax implications)

ACCESS TO TECHNOLOGY AND DIGITAL LITERACY

- technology has saved the day but not for those without access to it
- clients who have no cell or internet service are not reaching out for assistance – making them further removed from the labour market
- some R&I clients cite digital literacy issues as a barrier - even though they are quite capable to apply those skills to other online activities such as video games

ONGOING SYSTEMIC ISSUES

- decrease in Ontario Works (OW) clients, particularly those with less than Grade 12
- "cracks" in the system showing

NEW CAREER

- some clients appear to be doing more long-range planning
- increase in more highly educated clients (post-secondary degree) who were laid off due to mandated closures - now looking for a new job or career and expecting higher wages due to education

- increase in new clients requesting resume help – were employed but unsure if employer will reopen and pandemic provided time to explore their transferrable skills and consider a job change
- increase in SC applications – want to use downtime to improve credentials (LMI is required to support applications to SC)

2. EO SERVICES BEING OFFERED

- All EO ES offices closed in March but continued to offer virtual services
- In early September, ES were once again able to offer a wider-range of services. Each ES has a slightly different approach as follows:
    - for those with space to social distance, they continue to accept face-to-face clients;
    - some allow face-to-face services by appointment only and are focussed on those most removed from the labour market;
    - others limit access to a specified number of clients per day per week;
    - some allowed R & I clients to be part of their daily limit;
    - each offers "curbside pickup" for help with resumes, cover letter and other documents;
    - meeting clients by Zoom or Microsoft Teams;
    - increased sanitization and cleaning of office space; and
    - limiting number of staff in the office at any one time.
- Youth Job Connect (YJC) is completely virtual and digital literacy of YJC participants has not been an issue; they are assessed for digital competence at beginning of the program and there are "special" supports/funds to assist with them with the cost of a device and internet access
- virtual intake is more challenging as key information can be missed; ES providers try to adapt services to each client's needs and digital/tech capacity
- intakes have declined but requests for information have increased

3. EMPLOYMENT TRENDS

EMPLOYERS AND UNFILLED JOBS

- can't find workers and some feel CERB has reduced the pool of workers
- want staff to hit the ground running with no time to train and not willing to compromise - in the past employers were more open to partial skills sets or lower skills but were willing to train
- other ES providers reported the opposite - some employers are more accepting of lesser credentials (job seekers not fully qualified) and are more willing to train
- due to layoffs, some employees found other jobs and are no longer available
- continues to be a disconnect in employer expectations
- more jobs re-posted and unable to fill vacancies in minimum-wage jobs, especially retail
- more calls coming from employers and ES job developers are reaching out to new employers
- some increased interest in trades and students
- lowest paid workers are also the most essential
- job-seekers are reluctant to work at daycare centres – may need to care for their own children and/or concerns about responsibility for high level of new cleaning regulations and increased risk of infection
- job offers made but are not accepted; clients expect higher wages than education level allows
- some employees did not receive the promised COVID pay
- some first-time job seekers find some employers underpay for some skills
- some of the more traditional larger employers are not posting job vacancies
- more exploration of NOHFC and other grants to add value/improve operations in their business
- more fulltime positions being posted

- some retail employees challenged by customers who are unwilling to wear a mask – creates fear in the workplace

WOMEN

- women with children were significantly impacted by job lay-offs and lack of childcare
- some women chose to stay home with their children
- in some cases, women are returning to the workplace after years of raising children and just need a bit of training (i.e. being a cashier) but some employers unwilling to do this

YOUTH

- some parents no longer pushing youth to get a job but to stay home and out of the community

ASSESSING AND MATCHING JOB SEEKERS

- virtual services make it more difficult to assess a client and match them with an employer – particularly challenging for youth and job readiness programs
- EO offering “job trials” to employers to help clients gain experience

NEW BUSINESSES

- some new start-ups and other companies making masks and in some cases PPEs
- some new businesses that had to shut down right away did not qualify for government supports

EMPLOYER TRAINING AND USE OF COJG

- COJG has been used to pay for PSW training but clients complain they are not scheduled enough hours and for community workers, there is too much travel and poor coordination of client visits
- re-training is good but still need some income to live on while training
- mixed response to COJG for employee training however there was increased interest by some employers to train staff since business is slow (i.e. project management credentials for engineers)
- mixed feelings about micro-credentials training and some ES providers feel this should be done in-house and be based on employer-specific skills required
- COJG funding less accessible for smaller employers as they must pay all costs up front and only reimbursed after the training

4. JOBS IN DEMAND - HAS THIS CHANGED?

- expect traditional retail jobs may not exist in future
- initial high urgency jobs (i.e. in hospital for cleaners, screeners and PSWs) now filled
- office administrative positions filled up quickly
- demand in the following occupations: PSWs, COVID-19 screeners, construction labourers, truck drivers, call centre workers, customer service, cleaners, security guards, computer technicians, trades (carpentry – renovations), delivery drivers, school bus drivers and daycare caregivers
- construction jobs very hard to fill even though starting at $18/hour
- not hiring – retail, indoor games and recreation facilities, beauty salons
- many are working from home
- some have found (new) remote work in customer service jobs (i.e. inbound calls centres)
- in some cases, when an employer does hire, there are many “no shows”

5. CLIENT CHANGES, BARRIERS AND ACCESS TO OTHER SERVICES

ONGOING NEED FOR WRAP-AROUND SERVICES

- mental health issues for clients are significant
- clients who would normally be referred from OW or ODSP are coming directly (walk-ins) and need wrap-around services (i.e. social determinants of health such as housing, childcare, counselling, etc.)
- compassion fatigue is becoming an issue for ES workers
- one agency reported that 15 clients have died since March 2020 due to opioids

- when a child in daycare or school gets sick and has to isolate - usually impacts on the mother who now has to stay home and can't work – no supports to help

DEMOGRAPHICS

- in most cases, overall demographics have not changed much; however, one ES service reports a high number of clients with less than high school and another experienced a drop in youth aged 15-24
- number of youth clients increase when youth employment funding is available
- there has been an increase in project funding to develop youth programs
- R&I clients are fairly stable – since early September 2020, clients can access services and resources by phone or online (email, zoom), in-person by appointment, or curb-side pickup
- clients who would have gone to Toronto for winter (warmer, more services) have stayed in Sudbury
- some people have chosen to stay home

TECHNOLOGY

- Technology is a barrier, especially for older workers (access to internet and devices; can't meet employers face-to-face or drop off a resume)
- Client is unable to complete necessary training (Smart Serve, WHIMS, etc.) and employment paperwork if they do not have access to technology
- Clients needing CERB or ODSP for the first time can't get through by phone; cannot access benefits without internet access
- With CERB ended, those without EI eligibility cannot start a new claim at OW (without technology) since the offices are closed

Are we ready for the future?

Last year, we asked ourselves this same question - are we ready for the future? We discussed the challenges that we had been seeing for the last few years, but have always acknowledged that no one has a crystal ball to predict what will happen.

COVID-19, the pandemic that continues to rage on across our planet has shown us that. Countries across the world are now engaged in a delicate dance - trying to find ways to balance public health restrictions to prevent further spread of this virus, with reopening the economy and keeping it open. A closed economy means job and revenue losses, but an out-of-control virus means illness, an overwhelmed healthcare system and significant loss of life.

Over the years, our models and educated assumptions have been based on traditional measures such as historical data, labour market indicators and economic trends. From these data sources, we identified some of the ongoing concerns regarding shortages in the skilled trades, the disconnect between the expectations of employers and education, the lack of experiential learning opportunities for students, the rapid pace of technological change and the increasing gap for those most distanced from the labour market. We also talked about the need to be adaptable, flexible, ready to change and willing to be trained, retrained or re-skilled. None of these challenges have gone away and at that time we called this a *tsunami of change* that is coming. However, nothing compares to what we are now seeing and the impact that the pandemic is having on absolutely every aspect of our lives, including work. This is more than a tsunami – it is life altering global event.

Are we ready and able to adapt to a future that is so unpredictable at this moment in time? There is no question that in most cases, people, employers and governments are trying to do the best that they can, but being flexible and adaptable to whatever our new future will be is critical. This graphic by Dreamtime.com says it well. The biggest challenge is that *the future is still loading*.

Action Plan Update

WPSM PRIORITY AREAS

Each year, MLTSD asks all workforce planning boards to include an update on some of the activities they support in local communities. This includes priority areas, actions, partners, outcomes and timelines as well as partnership projects led/co-led by the local workforce planning board. If you would like more information on partnership projects being led by all of Ontario's 26 workforce planning boards, please go to: http://www.workforceplanningontario.ca/ to learn more.

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 as member of taskforce advocating for northern workforce and business development strategy for the Ring of Fire. **Workforce Taskforce:** participate as taskforce member responding to needs of local employers for resource contacts/services to help address their workforce needs. **Roundtable/luncheons 2020-21:** all events have been virtual and include a wide range of topics and speakers.	on hold ongoing as appropriate
Chamber of Commerce PEP conference 2020	GSCC; SNC Lavalin; Canadian Council for Aboriginal Business	**PEP (Partnership, Employment, Procurement) conference and Tradeshow:** participated as a panel moderator, co-sponsor and participant.	event has been cancelled
LMI and support	Sudbury East Chamber of Commerce	Provide support, sponsorship and sharing of information on LMI issues, initiatives and resources.	ongoing as requested
Personal Support Workers and senior's care	City of Greater Sudbury – Senior's Advisory Council	Provided support to 2 seniors' summits hosted by the City; Provide additional support to the City Council member lead and the Advisory Council as needed.	Oct/Nov 2019 ongoing
Indigenous workforce development	Kenjgewin Teg (KT)	LMI support and assistance as requested.	ongoing as requested
	Gezhootjig Employment and Training	Provide LMI to support their work and offer to host ES provider consultations with staff each year.	ongoing as requested
	Atikameksheng Anishinabek (Whitefish)	LMI support and assistance as requested with annual career fairs.	ongoing as requested
	M'Chigeeng Employment & Training	LMI support and assistance as requested with annual career fairs.	ongoing as requested
OYAP	Rainbow Board; Sudbury Catholic School Board	Provide LMI and consultations on a broad range of trades workforce development-related topics.	throughout the year
Videos promoting the trades	Rainbow Board; Sudbury Catholic School Board; Edge Factor	Connected with various trades employers to participate on screen in a series of videos on the skilled trades – various local employers agreed to participate.	summer 2020
Employer information videos	LAMBAC; BlueSky; Canadore College (post production studios)	Develop a "working at home" video series for employers: on cyber security; developing a website presence; and on managing staff remotely.	videos to be complete March 2021
Ontario Regional Sounding	Conference Board of Canada; Future Skills Centre	Participate in online local/regional sounding board events as scheduled.	Nov 2020 as requested
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 as requested
Rural Northern Immigration Pilot	City of Greater Sudbury	Provide LMI support to RNIP.	ongoing as requested
Skills Catalyst Fund - Employer training activities	Professions North Nord (PNN); eNova Consulting	Provide LMI and guidance to their proposal to provide employers with training on successfully integrating internationally trained professionals.	proposal did not receive MLTSD funding

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
PSW workforce taskforce	Northeast Local Health Integration Network (NELHIN)	Participate as member of the taskforce with local health partners and on subcommittees addressing working conditions and human capacity;	monthly meetings ongoing
Addressing shortages in the PSW workforce	Greater Sudbury Employment Support; local colleges; PSW employers	Continue with widespread dissemination of PSW survey results. The City's role has transitioned to the Senior's Advisory Council as noted above.	continue dissemination; see above
Manitoulin – PSW shortages	LAMBAC; Employment Options; health care providers	Host several meetings on the status of PSWs on Manitoulin with key stakeholders and identify a strategy to address current/future shortages.	currently on hold due to pandemic
Women in skilled trades	Colleges; industry; OYAP; high schools	Continue to support skilled trades summer camp for girls, skills promotion and other related activities/events.	summer camps cancelled
Jill of all trades	Cambrian college; OYAP at both English boards	Participate on a committee to explore hosting a virtual trades event targeting girls in grade 7-10.	May 2021
Modern Mining and Technology Sudbury	MMTS; various local mining companies and partners	Continue to support week-long event for students to expose them to the mining industry. Attend events and luncheon kick-off.	activities cancelled
FONOM (Federation of NEO Municipalities) conference	Labour Market Group; Far Northeast LEPC; AWIC	Participate in tradeshow at FONOM in Timmins targeting municipal leads (mayors, council members, economic development, CEOs) to highlight LMI across the northeast.	event cancelled
Construction outlook	Buildforce Canada; LMI committee northern Ontario	Participate in invite-only annual webinars/teleconferences to review a preliminary construction labour market outlook to identify local workforce issues and projects.	December 2020
Government outreach	Initiated by stakeholders and by WPSM	LMI presentations- local MPs, MPPs, Mayors, Council members, economic development, MLTSD and MENDM.	ongoing as scheduled

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
COVID business impact surveys	Greater Sudbury Chamber of Commerce; City of Greater Sudbury	Collaborate on conducting 3 COVID-19 business surveys this fiscal and another in spring of 2021. Just under 800 employers responded to the first three surveys. Multiple organizations assisted with dissemination.	July 2020 May 2021
Pandemic impact and economic recovery report	8 other workforce planning boards	WPSM coordinated this effort to hire a researcher to conduct an analysis of early pandemic impacts, emerging issues and a review of pandemic recovery reports.	complete July 2020
TV and film workforce development	Cultural Industries Ontario North (CION)	Collaborating on development of a resource for students and job seekers outlining occupations in this industry and skill level required.	continuing
Skills Catalyst Fund – primary care needs	NOSM; Centre for Rural and Northern Ontario Research Laurentian University	WPSM is part of the advisory committee for this project which seeks to develop a forecasting model for physician demand in northeastern Ontario.	continuing
Occupations projected to grow/decline	WPSM led; support from OMAFRA (EMSI analyst)	WPSM continues to use the tool EMSI analyst (via a licence held by OMAFRA) to identify occupations projected to grow/decline for each census area.	new access just approved ongoing use
Workforce Planning Ontario (WPO)	All workforce planning boards across Ontario	Attend provincial meeting to discuss: provincial issues, challenges, and policies re: workforce planning in Ontario. Bring northern perspective to the table.	semi-annual meetings
ICT/High-Tech industry	Phase one: WPSM led; NORCAT Phase two: WPSM, Petryna Advertising, IONIC Mechatronics; area school boards	Phase one: WPSM completed a report on the results of a survey of ICT employers and their workforce needs. An info-graph on the results was widely disseminated. Phase two: This project has moved into a second phase and will include a resource for students and job seekers on identifying occupations, NOC, salary and skills required and a video featuring a local ICT employer.	phase 1: complete phase 2: April 2021

Projected impact of ICT on mining occupations	WPSM led; MiHR (Mining Industry HR Council); planning boards in NE ON	Explore opportunity to conduct a research project on the impact that ICT will have on mining jobs in the future and include retraining/up-skilling opportunities.	submit concept paper to MLTSD March 2021
Agriculture industry	OMAFRA; LAMBAC; Northern Ontario Farm Innovation Alliance; and others	Participated in various food and agricultural conferences; roundtable consultations; international agricultural event; discussions re: large animal vet shortages. Currently considering an asset mapping initiative to map farms.	ongoing participation and support
Forestry sector	Led by AWIC and Ministry of Natural Resources and Forestry	Support a research project to understand workforce demand in the forestry industry; participate in a student survey re: knowledge and interest in this industry.	participate as requested
Online Job vacancies research	Vicinityjobs.com; EO Employment Services; school boards; colleges; currently working with other partners TBD	WPSM uses data provided by Vicinityjobs.com to identify types of occupations being posted and by which industries. WPSM is exploring other approaches to collecting online job vacancy data to further refine the information collected. Wide dissemination of reports is ongoing.	continue with quarterly and annual reports
Northern immigrant attraction and retention strategy	FEDNOR; local boards	Produce a baseline of occupations in demand from various LMI data sources and research for FedNor to support their Immigration strategy.	cancelled - no further FedNor direction
Ghosting in the workplace	WPSM led; local colleges; EO Employment Services; CMHA (to be invited)	Research will target all graduates and ES clients re: experiences applying for jobs and how many employers they never hear from; explore impact on job seeker and their mental health/job search motivation.	cancelled due to COVID-19 challenges

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
In-demand skilled trades project	MLTSD project; WPSM led	WPSM lead for local project on in-demand skilled trades, projected shortages and the apprenticeship system. A local report was not produced as originally anticipated; however the results of this research have been widely used.	MLTSD report complete; dissemination continuing
Skills Catalyst Fund	Northern Consortium; economic development leads (Greater Sudbury, Timmins, Sault Ste. Marie)	Development of micro-skill modules for municipal employees to increase opportunities for internal selection for management positions. Several modules and communities have been selected.	pilot completion June 2021
Work Integrated Learning Advisory Committee	Laurentian University (funded by RBC Future Launch)	WPSM sits on an advisory committee to support the WIL (work integrated learning) Coordinator at Laurentian to increase WIL opportunities for students. Currently assessing which departments offer WIL .	funding extension beyond Feb 2021
Apprenticeship consortium - pilot	Ontario Electrical League; Support Ontario Youth;	WPSM will continue to support this initiative and possible uptake in Sudbury despite no current interest by employers.	ongoing
Trade talks	WPSM lead; local colleges and trades employers	Coordinate/host trade talk events with local college trade programs; invite employers to explore trades being offered, tour trade shops and discuss needs/expectations of industry employers; increase apprenticeship opportunities.	delayed to March 2021
Education Coordinating Team (ECT) – industry liaison	Area school boards; post secondary institutions; and employment services	Continue to provide opportunities to increase ECT's knowledge re: employer needs - to better align education and industry – various events held each year.	quarterly meetings due to pandemic
Stellar Awards	WPSM lead; Education Coordinating Team	Host bi-annual Stellar Awards event to recognize employers who provide exemplary learning experiences for students.	delayed to 2021
Online job portal	Greater Sudbury; Chamber of Commerce; WPSM support	The city withdrew participation and the Chamber decided to host the free job portal for employer members. WPSM provides some sponsorship funds.	job Portal implemented
Employment Ontario (EO) network	WPSM lead	Regular consultations with EO services on EO data, LMI, EO network challenges, and needs of employers and jobseekers	consultations each year
Soft skills	Employment Options in Espanola; local employers	Produced 2 videos in each area highlighting local employers and soft skills they look for.	complete

Key Stakeholders & Resources

GOVERNMENT:
City of Greater Sudbury (Mayor and Council)
FedNor
Local MPs and MPPS
Ministry of Agriculture, Food & Rural Affairs
Ministry of Energy, Northern Development & Mines
Ministry of Labour, Training and Skills Development
Ministry of Education
Northeast Local Health Integration Network
Service Canada

IMMIGRATION/INTERNATIONALLY TRAINED:
Local Immigration Partnership
Ivey Immigration
Professions North/Nord
Rural Northern Immigration Pilot

LABOUR:
Various unions/locals

ASSOCIATIONS:
BuildForce Canada
Canadian Mental Health Association
NorthEastern Ontario Construction Association
Ontario Construction Secretariat
Ontario Electrical League
Ontario Health Coalition
MineConnect (former SAMSSA)

ECONOMIC DEVELOPMENT/BUSINESS:
First Nations - Economic development leads
Greater Sudbury Development Corporation
LAMBAC
Greater Sudbury Chamber of Commerce
Sudbury East Chamber of Commerce

INDIGENOUS ORGANIZATIONS:
Atikameksheng Anishinabek
Gezhtoojig Employment & Training
Kenjgewin Teg
N'Swakamok Native Friendship Centre
Wii-ni n'guch-tood Employment & Training

INDUSTRY/BUSINESSES (in following sectors):
Professional, Scientific Technical
Construction
Education
Health, hospitals and long-term care
Information technology/high-tech
Mining and mining supply services
Retail
Transportation/Logistics
Television and film

TRAINING, EDUCATION AND EMPLOYMENT:
Cambrian College
Canadore 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
Northern College
NOSM (Northern Ontario School of Medicine)
Rainbow District School Board
Spark Employment Services
Sudbury Catholic District School Board
YMCA Northeast Employment/Immigrant Services

RESEARCH AND INNOVATION:
CEMI (Centre for Excellence in Mining Innovation)
HARD-LINE
MIRARCO (Mining Innovation Rehabilitation and Applied Research Corporation)
NPI (Northern Policy Institute)
SOY (Support Ontario Youth)
NORCAT
MiHR (Mining Industry HR Council)

MEDIA:
Toronto Star
CBC
CTV – northern Ontario
Northern Life
Northern Ontario Business
Manitoulin Expositor
Sudbury Star

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