Local Labour Market Plan 2019-2020

Workforce Planning for Sudbury & Manitoulin

Planification en main-d'oeuvre

Local Labour Market Plan

2019 - 2020

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) 2019-20, provides a foundation on which to build. It provides evidence-based research, corroborated by information from key stakeholders...all of which contributes to informed planning, decision-making, partnerships, and action.

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

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Table of Contents

Labour Market Observations

New words are creeping into the labour market lexicon. Some are not actually new words per se, but descriptors that are changing how we look at what is happening in the labour market from both the supply and the demand side. When words such as flexibility, adaptability, suitability, ghosting, reskilling, millennials, soft skills, NEET (not in education, employment or training) and work/life balance become the lexicon of the day, something has shifted. Something has changed.

While the mandate of a local workforce planning board is to be a neutral yet evidence-based voice, the data doesn't tell the whole story. Don't get me wrong. Good local labour market data is key to making sound planning and policy decisions. Good data is like the foundation of a house. Without a solid foundation, made of the right materials for the right climate and environment, the house may not be sound or withstand the changing winds. While we continue to be asked what jobs are growing, what jobs are declining, what industries are hiring and what jobs will look like in the future, the changing winds are making these more complicated to answer.

When we look at labour market data standards, on the supply side, a certain percentage of the population is considered "working age" which implies that there is a pool of people who are willing, ready and able to work. However, in conversations with employment service providers and employers, the picture is a bit different. For example, we tend to blame millennials for not wanting to work. We can't paint them all with this same brush. What we are seeing are those who are willing, able and ready to work - sometimes at two or three jobs just to make ends meet often on contract, with no benefits or pension. While many want greater work/life balance, they show up to work on time, don't make a lot of demands, are happy to have a job, and may continue to look for a better job. Who can blame them?

On the other side of the supply spectrum, we are seeing others who fall closer to the NEET category – where they are not in education, employment or training. While they may have some education, many have high school or less. They may have very limited soft skills (like work ethic), and/or very complex life issues such as mental health challenges, addictions, lack of transportation, lack of childcare…the list goes on. So, while the labour market data may show that the community has a certain number of people in the working age category, not all are adaptable, able or willing to work, at least not in the conventional sense.

Additionally, some are making demands of employers regarding working hours, wage expectations and days off. Others simply "ghost" the employer, a term used in the dating world where you agree to show up but don't without so much as a text or call. Employers report this happening even when they have arranged for someone to be interviewed or have hired them.

The education system, parents, employers and society as a whole are not blameless here. The whole system is connected. From a labour market perspective, employers also "ghost" job applicants and never respond to them. Employers also want and expect fully trained and experienced workers. While some are willing to support our future workforce through training, co-op placements, internships and/or apprenticeships, others don't. They don't feel it is their job.

Without getting into a history lesson on what has shifted and changed (in the workplace, in families, in education, in expectations), what will happen when we don't have enough people who are willing, ready and able to do the work?

Some northern communities are already experiencing this as their labour pool is shrinking due to changing demographics, out-migration of youth, an increase in those who fit into the NEET category and/or employers who are unwilling to adapt, shift, change and train.

As a result, some communities are starting to recognize the value of immigrants; experienced people who are willing to come to this country and are ready to work. Are we shifting back to an era where immigrants fill labour pool demand and the culture of work changes once again? In some places, this may be the only answer as communities struggle to maintain their working age population in order to survive and thrive into the future.

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 not previously reported is included in this report.

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

Local data 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 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

The mandate of a local workforce planning board such as Workforce Planning for Sudbury & Manitoulin (WPSM) is to identify labour market changes, trends and issues that impact on local economies and employment. Various Labour Market Indicators (LMI) from data sources such as Statistics Canada and the 2016 Census are used to provide some of this information. Since new Census data won't be available until 2021, this report will include 2016 Census data that has not yet been reported in previous labour reports. This includes information on immigration, population and NEET youth (Not in Education, Employment or Training) to provide an added perspective.

As with previous reports, LMI data is presented for the WPSM Board census area where it's 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, government leads and others.

DEMAND SIDE

It is important to look at both the demand and supply side of the labour market. The ***demand side*** includes industry changes, employment trends as well as current and emerging workforce themes. Other data is used to supplement local knowledge. For example, WPSM uses data from *Vicinityjobs* to identify online job postings for our area; *EMSI Analyst* to provide insights into occupations projected to grow/decline; and the *Ontario College of Trades* for information on the trades, and projected shortages.

SUPPLY SIDE

Data from the ***supply side***, in other words, who is currently working, looking for work or not working is included. Data sources include: *2016 Census; Statistics Canada;* and *Employment Ontario (EO)* which is funded by the Ministry of Labour, Training and Skills Development (MLTSD). Matching jobseekers with industry needs is challenging and complex as many employers don't train yet want trained and experienced skilled workers.

Supply side data is supplemented by local consultations with EO Employment Service Providers, educators and others to better understand: needs, projected gaps, barriers and emerging trends.

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 may be engaged in over the next few years.

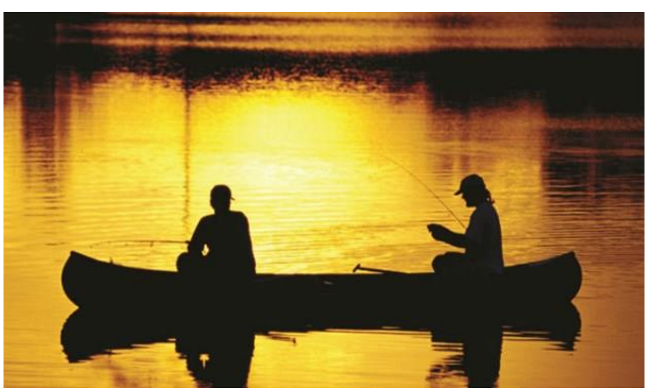
Labour Market Information - Indicators

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 called Canadian Business Patterns. With a few changes in how this information has been collected, Statistics Canada has re-branded this dataset 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, which 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 datasets 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 2019)										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	64	10	4	6	1	1	0	86	1	18
21 Mining	62	11	5	8	4	3	13	106	1	17
22 Utilities	13	2	4	0	1	1	0	21	0	19
23 Construction	635	250	112	67	50	19	12	1145	10	3
31-33 Manufacturing	96	45	31	37	35	6	8	258	2	12
41 Wholesale Trade	127	73	62	62	30	11	9	374	3	9
44-45 Retail Trade	352	183	201	157	89	30	16	1028	9	5
48-49 Transportation/Warehousing	218	46	21	22	13	6	4	330	3	11
51 Information and Cultural	72	29	9	7	10	7	1	135	1	16
52 Finance and Insurance	697	89	45	31	19	5	4	890	8	6
53 Real Estate, Rental, Leasing	2498	170	32	21	21	5	0	2747	24	1
54 Professional Scientific Tech	692	222	62	47	22	11	6	1062	9	4
55 Management of Companies	130	8	7	3	3	0	0	151	1	14
56 Administrative Support	167	67	47	31	20	10	12	354	3	10
61 Educational Services	81	18	14	6	6	4	9	138	1	15
62 Health Care & Social Assistance	553	301	125	75	62	13	22	1151	10	2
71 Arts, Entertainment, Recreation	108	35	21	15	13	2	1	195	2	13
72 Accommodation & Food	108	70	52	84	90	31	3	438	4	8
81 Other Services	452	254	97	38	32	6	4	883	8	7
91 Public Administration	0	1	1	0	1	2	1	6	0	20
CLASSIFIED BUSINESSES	7125	1884	952	717	522	173	125	11498		
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%	17%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts 2019
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 2018 – JUNE 2019)							
NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing and farming	4	0	0	0	4	86
21	Mining and oil and gas extraction	9	1	-2	1	9	106
22	Utilities	0	2	1	0	3	21
23	Construction	28	-8	3	3	26	1145
31-33	Manufacturing	-4	-9	0	1	-12	258
41	Wholesale trade	-1	5	-11	7	0	374
44-45	Retail trade	-26	-9	5	3	-27	1028
48-49	Transportation and warehousing	-7	1	-2	-1	-9	330
51	Information and cultural industries	-4	-2	4	-1	-3	135
52	Finance and insurance	47	5	0	1	53	890
53	Real estate and rental and leasing	8	30	7	0	45	2747
54	Professional, scientific and technical services	-4	8	-4	3	3	1062
55	Management of companies and enterprises	21	0	-1	0	20	151
56	Administrative and support	-5	8	2	1	6	354
61	Educational services	9	2	-3	1	9	138
62	Health care and social assistance	29	-19	20	4	34	1151
71	Arts, entertainment and recreation	0	13	1	0	14	195
72	Accommodation and food services	-2	-12	-8	1	-21	438
81	Other services	36	12	3	-1	50	883
91	Public administration	0	0	-1	0	-1	6
	TOTALS	138	28	14	23	203	11498

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2019
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

Greater Sudbury experienced across-the-board increases in the number of firms in all employee size categories, including an additional 23 firms moving into the 100 or more employees range. There were clear increases in employment among various sectors such as: *Construction; Finance & Insurance; Real Estate & Rental and Leasing;* and *Health Care and Social Assistance.* On the other hand, there have been job losses in *Retail Trade, Accommodation and Food Services* and *Transportation & Warehousing.*

Establishments with 500 or more employees, includes: hospitals, schools, nickel-copper ore mining companies, regional government, an industrial construction firm, a janitorial service company and a food service contractor. Establishments with 200-499 employees, includes: mining supply and service companies; manufacturing firms, retail stores, construction firms, finance and insurance businesses, nickel-copper ore mining firms, nursing care facilities, an employment placement agency, a temporary employment service, a call centre, a grant-making service and a religious organization, among others.

District of Manitoulin

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 2a – MANITOULIN DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
(JUNE 2019)

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	113	15	3	2	0	0	0	133	12	1
21 Mining	3	1	0	0	0	0	0	4	0	20
22 Utilities	14	0	0	0	0	0	0	14	1	16
23 Construction	65	35	16	5	0	0	0	121	11	3
31-33 Manufacturing	14	4	4	0	2	0	0	24	2	13
41 Wholesale Trade	14	3	0	1	0	0	0	18	2	14
44-45 Retail Trade	44	26	31	12	7	2	0	122	11	2
48-49 Transportation/Warehousing	31	14	2	3	4	1	1	56	5	9
51 Information and Cultural	6	5	2	1	0	0	0	14	1	16
52 Finance and Insurance	23	9	5	0	0	0	0	37	3	10
53 Real Estate, Rental, Leasing	101	13	0	0	1	0	0	115	11	4
54 Professional Scientific Tech	53	23	1	0	0	1	0	78	7	7
55 Management of Companies	8	1	0	0	0	0	0	9	1	18
56 Administrative Support	12	9	3	1	1	2	0	28	3	11
61 Educational Services	2	2	3	0	0	0	1	8	1	19
62 Health Care, Social Assistance	22	17	10	5	8	4	2	68	6	8
71 Arts, Entertainment, Recreation	18	4	2	0	1	0	0	25	2	12
72 Accommodation & Food	58	18	18	10	2	2	0	108	10	5
81 Other Services	46	31	6	2	1	3	0	89	8	6
91 Public Administration	1	0	1	3	7	3	2	17	2	15
CLASSIFIED BUSINESSES	648	230	107	45	34	18	6	1088		
Percentage of all classified and unclassified businesses	60%	21%	10%	4%	3%	2%	1%	100%		
Cumulative percentage	60%	81%	91%	95%	98%	99%	100%			
ONTARIO percentage of classified and unclassified businesses	70%	17%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts 2019
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 2018 – JUNE 2019)

NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS June 2019
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing and farming	-2	5	-2	0	1	133
21	Mining and oil and gas extraction	1	1	0	0	2	4
22	Utilities	0	0	0	0	0	14
23	Construction	11	-4	0	0	7	121
31-33	Manufacturing	2	-2	1	0	1	24
41	Wholesale trade	-1	0	0	0	-1	18
44-45	Retail trade	-2	0	3	0	1	122
48-49	Transportation and warehousing	7	0	1	-1	7	56
51	Information and cultural industries	-1	1	0	0	0	14
52	Finance and insurance	-7	4	0	0	-3	37
53	Real estate and rental and leasing	6	4	1	-1	10	115
54	Professional, scientific and technical services	4	1	0	0	5	78
55	Management of companies and enterprises	3	-1	-1	0	1	9
56	Administrative and support	3	-3	2	0	2	28
61	Educational services	-3	1	0	0	-2	8
62	Health care and social assistance	-5	-3	3	0	-5	68
71	Arts, entertainment and recreation	1	-2	1	0	0	25
72	Accommodation and food services	2	1	0	0	3	108
81	Other services	3	0	1	0	4	89
91	Public administration	0	-1	1	0	0	17
	TOTALS	22	2	11	-2	33	1088

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2019
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, there has been an increase in employers across most industries. While there has been a decline of two firms with over 100 employees, that is likely off-set by an additional 11 firms with 20-99 employees. With the smaller changes by industry, it is more difficult to make firm estimates. Some industries clearly would have experienced some employment growth, such as: *Mining & Oil and Gas Extraction; Professional, Scientific & Technical Services; Accommodation & Food Services;* and *Other Services.* In other industries, without knowing the actual increase or decrease in employment where there are both increases and decreases in the number of firms by different employee size ranges, any estimate would be a guess.

There is one establishment, a general freight trucking firm, with over 500 employees, and two establishments with 200-499 employees, both of which are band councils.

District of Sudbury

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 3a – SUDBURY DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
(JUNE 2019)

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	25	8	3	1	2	2	146	10	5
21 Mining	2	1	0	0	1	0	3	7	0	20
22 Utilities	11	1	1	2	0	0	0	15	1	16
23 Construction	97	56	22	8	4	0	0	187	13	2
31-33 Manufacturing	16	3	4	4	4	3	3	37	2	12
41 Wholesale Trade	17	4	1	0	2	0	0	24	2	14
44-45 Retail Trade	47	25	39	26	6	4	0	147	10	4
48-49 Transportation/Warehousing	54	18	5	3	1	2	2	85	6	7
51 Information and Cultural	5	6	0	1	1	0	0	13	1	18
52 Finance and Insurance	47	3	6	3	1	0	0	60	4	10
53 Real Estate, Rental, Leasing	189	24	2	3	1	0	0	219	15	1
54 Professional Scientific Tech	59	9	6	2	0	0	0	76	5	8
55 Management of Companies	8	0	0	0	0	0	0	8	1	19
56 Administrative Support	27	5	1	4	0	1	0	38	3	11
61 Educational Services	8	5	2	0	0	0	0	15	1	16
62 Health Care & Social Assistance	24	20	9	4	8	2	2	69	5	9
71 Arts, Entertainment, Recreation	21	9	1	4	0	0	0	35	2	13
72 Accommodation & Food	76	38	16	10	8	4	0	152	10	3
81 Other Services	76	37	12	2	1	0	0	128	9	6
91 Public Administration	0	2	4	4	8	4	1	23	2	15
CLASSIFIED BUSINESSES	889	291	139	83	47	22	13	1484		
Percentage of all classified and unclassified businesses	61%	19%	9%	5%	3%	1%	1%	100%		
Cumulative percentage	61%	81%	90%	95%	98%	99%	100%			
ONTARIO percentage of classified and unclassified businesses	70%	17%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts 2019
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 2018 – JUNE 2019)

NAICS	INDUSTRY SECTOR	FIRM SIZE (# OF EMPLOYEES)					TOTAL # OF FIRMS June 2019
		0	1-19	20-99	100+	TOTAL	
11	Agriculture, forestry, fishing and farming	6	-5	1	1	3	146
21	Mining and oil and gas extraction	-2	1	0	0	-1	7
22	Utilities	3	0	0	0	3	15
23	Construction	-13	9	-2	0	-6	187
31-33	Manufacturing	-3	-4	2	0	-5	37
41	Wholesale trade	0	-2	0	0	-2	24
44-45	Retail trade	-3	0	2	-1	-2	147
48-49	Transportation and warehousing	1	0	0	1	2	85
51	Information and cultural industries	1	-2	1	0	0	13
52	Finance and insurance	8	1	1	0	10	60
53	Real estate and rental and leasing	8	10	-1	-1	16	219
54	Professional, scientific and technical services	8	2	0	0	10	76
55	Management of companies and enterprises	2	-1	0	0	1	8
56	Administrative and support	7	0	1	0	8	38
61	Educational services	2	4	0	0	6	15
62	Health care and social assistance	-4	1	1	1	-1	69
71	Arts, entertainment and recreation	2	-1	0	0	1	35
72	Accommodation and food services	-8	4	0	0	-4	152
81	Other services	1	3	-1	0	3	128
91	Public administration	0	1	1	-1	1	23
	TOTALS	16	21	6	0	43	1484

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2019
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

In the case of Sudbury District, there has been a net increase in employment, with net increases in three of the four employee size categories. However, increases/decreases cancel each other out among firms with more than 100 employees. Yet the distribution of increases and decreases by industry has resulted in more Sudbury District industries showing a net decrease in the number of firms. Although *Health Care & Social Assistance* as well as *Accommodation & Food Services* show a decrease in number of firms, they have actually witnessed an increase in employment. Industries that are certain to have more jobs include: *Transportation & Warehousing; Finance & Insurance; Professional, Scientific & Technical Services; Educational Services;* and *Administrative & Support* (this is comprised of temp agencies, call centres, janitorial services, landscaping services and other services to businesses).

Among establishments with 200-499 employees, there are: two nickel-copper ore mining firms, a paper mill, a hospital and a band council.

Other LMI Data

TOP FIVE INDUSTRIES

As illustrated below in Table 4, Greater Sudbury has four of the same top five industries by number of employers as Ontario (excluding *Finance & Insurance*) 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 list for Greater Sudbury and Ontario. In every area, the top five industries account for over 55% of all businesses.

TABLE 4 TOP FIVE INDUSTRIES BY NUMBER OF FIRMS: DISTRICTS OF MANITOULIN AND SUDBURY, GREATER SUDBURY AND ONTARIO (June 2019)

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

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, the following represent industries with particularly high proportions of businesses with no employees:

GREATER SUDBURY – businesses with no employees:

- *Real estate and rental and leasing* – 91% (two-thirds are residential landlords)
- *Finance & insurance* – 78% (around 60% are investors buying/selling on their own account)
- *Agriculture, forestry, fishing and farming* – 74% (spread across various types of farming)

MANITOULIN DISTRICT – businesses with no employees:

- *Utilities* – 100% (of the 14 business establishments, 3 are engaged in hydro-electric power generation and 9 are involved in other electric power generation)
- *Real estate and rental and leasing* – 88% (over half are residential landlords)
- *Agriculture, forestry, fishing and farming* – 85% (most involve beef cattle ranching)
- *Wholesale trade* – 78%

SUDBURY DISTRICT – businesses with no employees:

- *Real estate and rental and leasing* – 86%
- *Finance & ins*urance – 78% (largest group are investors who are buying/selling on their own account)
- *Professional, scientific and technical services* – 78% (primarily accountants and consultants)
- *Utilities* – 71% (almost all engaged in other electric power generation)

OTHER CENSUS DATA

This section highlights additional data from the 2016 Census that WPSM has not included in previous reports. This includes data on:

- NEET Youth (not in education, employment or training)
- Immigrants and period of immigration
- Population data

NEET YOUTH (NOT IN EDUCATION, EMPLOYMENT OR TRAINING)

TOTAL YOUTH BETWEEN 15-19 YEARS OF AGE

The 2016 Census data allows us to quantify those youth who were not in school or in apprenticeship training, not working in a job and not looking for work, in other words, NEET youth.

In order to undertake this analysis, it is necessary to have a larger population base. So, these findings are presented for a geography which incorporates the entire WPSM area. For youth aged 15 to 19 years of age, the results for the entire group by gender as well as by Aboriginal status and official language – Anglophone or Francophone is examined.

Table 5: Total youth and NEET youth 15-19 years of age WPSM area (2016)

	TOTAL youth 15-19 years	BY OFFICIAL LANGUAGE		ABORIGINAL	NON-ABORIGINAL
		ANGLOPHONE	FRANCOPHONE		
MALES					
ALL	5600	4545	1055	1050	4550
NEET	295	250	45	50	245
% NEET	5%	6%	4%	5%	5%
FEMALES					
ALL	5210	4060	1150	950	4260
NEET	170	120	50	20	150
% NEET	3%	3%	4%	2%	4%

Statistics Canada, 2016 Census

There is a total of 10,810 youth between the ages of 15-19 living in the WPSM area. Most are still in school: around two-thirds (68%) are either in elementary or secondary school and another 19% are in post-secondary, equally divided between either university or community college, technical or trade school. In this age group in 2016 there were 465 NEET youth. By gender, a slightly higher proportion of males fell into the NEET youth category (5%) versus females (3%). There was not much variation by official language or Aboriginal status.

TOTAL YOUTH BETWEEN 20-24 YEARS OF AGE

The data for youth aged 20 to 24 years of age is presented a bit differently. Table 6 first shows the number of all youth in the following categories: gender, demographic group and level of educational attainment. Among all youth, females (47%) are more likely to have a post-secondary certificate than males (41%). However, the level of post-secondary attainment among Aboriginal youth in this age group is lower: males at 32% and females at 35%.

Table 6: Total youth 20-24 years of age and educational attainment WPSM area (2016)					
	TOTAL youth 20-24 years	BY OFFICIAL LANGUAGE		ABORIGINAL	NON-ABORIGINAL
		ANGLOPHONE	FRANCOPHONE		
MALES					
No certificate	665	575	90	165	500
High school	2760	2280	480	400	2360
Post-secondary	2330	1740	590	270	2060
FEMALES					
No certificate	590	540	50	160	430
High school	2550	2015	535	410	2140
Post-secondary	2755	2030	735	300	2465

Statistics Canada, 2016 Census

When these findings are expressed in percentage terms, the trend is even more striking: there is a considerable drop-off in NEET rates depending on one's level of educational attainment. Among those aged 20 to 24 years of age who do not have a high school diploma, roughly one third are NEET youth. Females with a high school diploma or less tend to have higher NEET rates than their male counterparts, except in the case of Aboriginal youth with a high school diploma, where Aboriginal youth have a NEET rate considerably higher than other groups with a high school diploma. As evident in Table 7, the highest NEET rate (percentage) is for female Francophones without a certificate.

Table 7: Total number and % of NEET youth aged 20-24 years of age WPSM area (2016)										
	TOTAL		BY OFFICIAL LANGUAGE				ABORIGINAL		NON-ABORIGINAL	
			ANGLOPHONE		FRANCOPHONE					
	N	%	N	%	N	%	N	%	N	%
MALES										
No certificate	210	32%	180	31%	30	33%	45	27%	165	33%
High school	200	7%	175	8%	25	5%	65	16%	135	6%
Post-secondary	70	3%	50	3%	20	3%	20	7%	50	2%
FEMALES										
No certificate	235	40%	195	36%	40	80%	60	38%	175	41%
High school	225	9%	185	9%	40	8%	40	10%	185	9%
Post-secondary	80	3%	65	3%	15	2%	10	3%	70	3%

Statistics Canada, 2016 Census

As noted, the number/percentage of NEET youth gets progressively higher with progressively lower levels of education. Although the data only provides the number/percentage of youth who fit into the NEET youth category, it is important to dig a bit deeper. For example, we need to ask: are these youth unable or unwilling to participate further in education, employment or training? During consultations with Employment Ontario Service Providers (discussed later in this report), many other factors may be impacting on NEET youth. This could include serious mental health issues, lack of housing, lack of transportation, lack of essential skills, lack of childcare, and other factors. This is why it is important that conclusions are not drawn from the data alone.

IMMIGRANTS – period of immigration, place of birth and education

PERIOD OF IMMIGRATION

Immigrants still make up only a small proportion of residents in the WPSM area. Table 8 provides the number and percentage of immigrants for each census division, together with their percentage share of the total population. More than half of the immigrants residing in these areas arrived in Canada before 1981. However, over the last several decades, the number of immigrants has been increasing, and the figures for those arriving between 2011 and 2016 (a five-year period) are not much lower than the numbers for those who arrived between 2001 and 2010.

Table 8: Number and percentage of immigrants WPSM area (June 2016)

	Greater Sudbury	Manitoulin District	Sudbury District
TOTAL POPULATION	158,665	12,955	21,245
Canadian born	148,665	12,405	20,440
Immigrants	9,295	500	790
Before 1981	5,335	355	505
1981 - 1990	720	40	70
1991 - 2000	830	25	65
2001 - 2010	1,405	40	85
2011 - 2016	1,005	45	60
Non permanent residents	710	55	10
PERCENTAGE			
Canadian born	93.7%	95.8%	96.2%
Immigrants	5.9%	3.9%	3.7%
Before 1981	3.4%	2.7%	2.4%
1981 - 1990	0.5%	0.3%	0.3%
1991 - 2000	0.5%	0.2%	0.3%
2001 - 2010	0.9%	0.3%	0.4%
2011 - 2016	0.6%	0.3%	0.3%
Non permanent residents	0.4%	0.4%	0.0%

Statistics Canada, 2016 Census

Table 9: Number of immigrants by place of birth - Greater Sudbury (2011 – 2016)

All recent immigrants (total)	1,005
Americas	110
Europe	120
Africa	180
Asia	575
China	55
India	170
Pakistan	80
Philippines	85
Vietnam	70

Statistics Canada, 2016 Census

PLACE OF BIRTH

Among immigrants who have arrived in the last five years, only Greater Sudbury has a sufficient number of recent immigrants that allows for a reliable breakdown by place of birth (Table 9).

Similar to what has been the case in the rest of Ontario and Canada, there has been a shift in the place of birth of recent immigrants. According to the 2016 Census, 57% of immigrants coming to Greater Sudbury cite Asia as their place of birth, and India is the most common country of birth.

EDUCATIONAL ATTAINMENT LEVELS

In recent decades, Canadian immigration policy has placed greater emphasis on admitting immigrants with higher levels of skills and of educational attainment. Table 10 illustrates this trend in the WPSM area, by comparing the educational attainment levels of employed immigrants, comparing those who arrived before 2010 and those who arrived between 2011 and 2016. Table 10 also shows the skill level of the jobs all immigrants are employed in according to the 2016 Census.

Table 10: Educational attainment levels of immigrants and skill level of occupations in which immigrants are employed WPSM area 2016

Educational attainment	IMMIGRANTS		Occupational Skill Level
	2010 or earlier	2011 - 2016	
University	42%	64%	42%
College or trades	31%	15%	28%
High school	19%	10%	20%
No certificate	9%	10%	10%

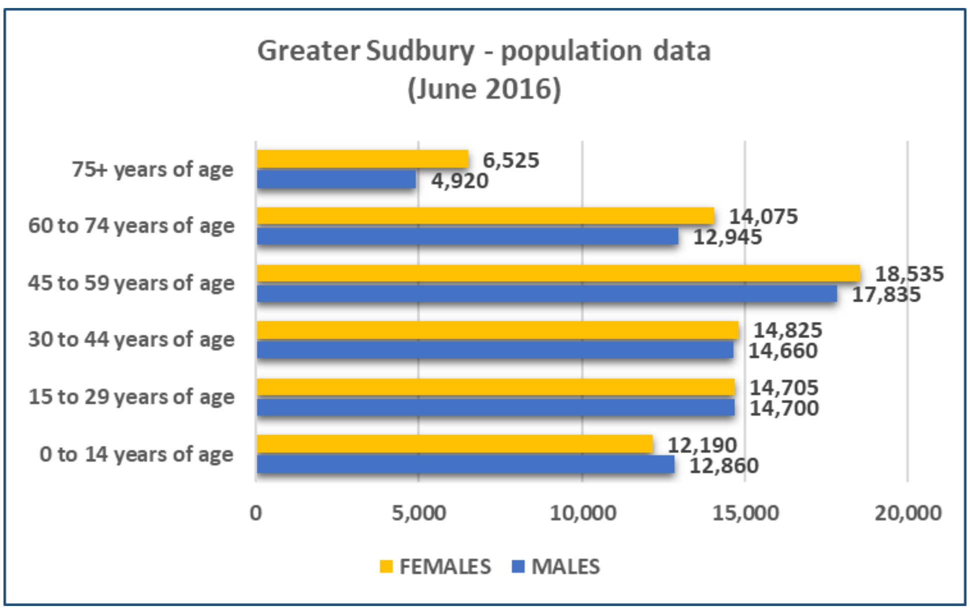
Statistics Canada, 2016 Census

More recent immigrants (2011-2016) possess higher levels of university educational attainment. Of those employed in 2016, almost two-thirds had a university degree (64%). In fact, one-quarter (24%) of all employed newcomers held a degree above a Bachelors' level. While overall, immigrants who arrived before 2010 had a lower proportion with a university degree, a similar quarter (also 24%) held a degree above a Bachelors' level. As well, among this cohort there was a large proportion with a college diploma or trades certificate.

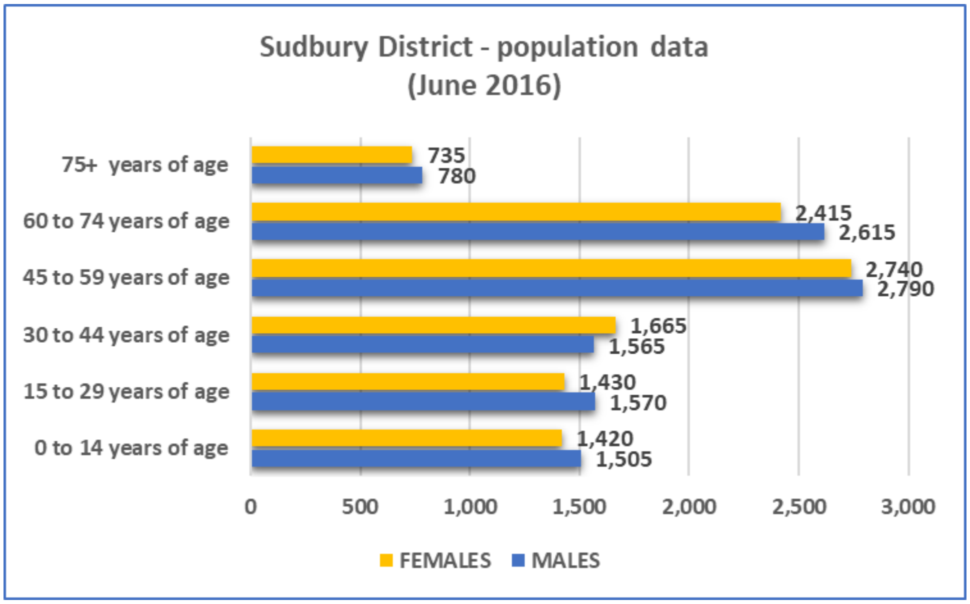
In terms of their employment outcomes, there was almost an exact match between the levels of educational attainment of all immigrants and the level of education required for the occupations that they were employed in.

POPULATION DATA:

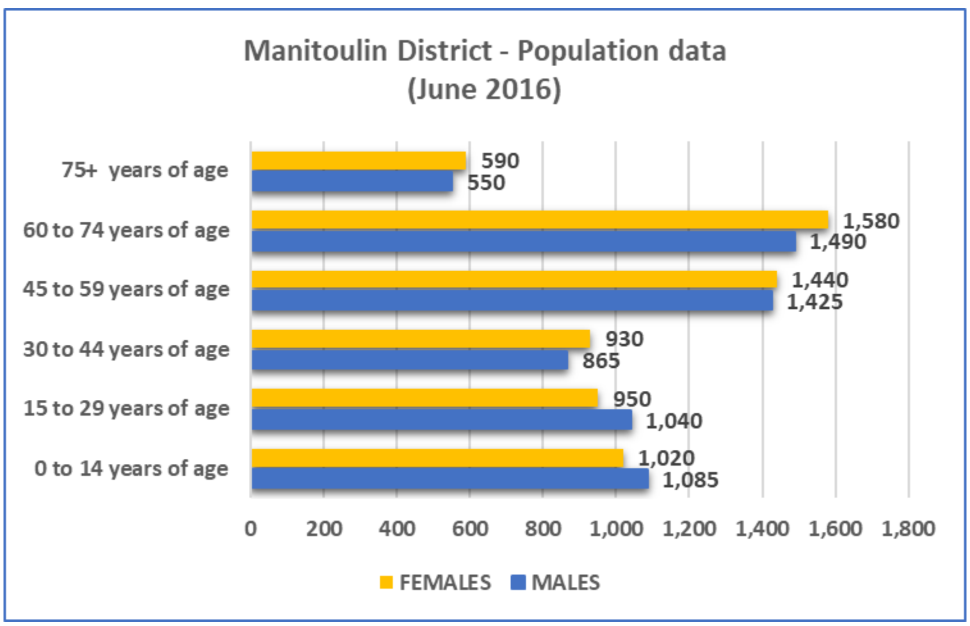
Population data illustrates the percentage distribution of an area's population by age categories and by gender. They provide an easy, visual way to compare the population distribution of different areas.



Although not all age categories are shown, Greater Sudbury's population data is similar to Ontario; however, Greater Sudbury has a higher proportion of people aged 50 years and older, and correspondingly smaller proportions less than 50 years of age. This could largely be explained by the fact that Greater Sudbury does not experience as large a percentage population growth from immigration as does Ontario as a whole.



The Sudbury District also has an older population, and the proportions are especially pronounced among older adults and younger retirees, those aged 50 to 69 years of age. There is a somewhat more even distribution of population among its younger age groups. Yet there is a slight gender imbalance among youth aged 15 to 19 years of age, but not as pronounced as the Manitoulin District.



The Manitoulin District has a considerably older population, particularly among those aged 45 to 74 years of age. It also has a somewhat larger population among children and youth (0-19 years of age), and a proportionately smaller population of young and middle-aged adults (25 to 49 years of age). Before the age of 20 years old, males typically outnumber females by a small amount, but Manitoulin has an unusual imbalance among youth aged 15 to 19 years of age (the actual figures are 460 males and 315 females).

Other Labour Market Research at WPSM

WPSM is actively engaged in using and analysing data provided by other data sources and conducting independent research with various partners. To download some of these and other research reports go to www.planningourworkforce. Here is a sample of several more current research initiatives:

JOBS PROJECTED TO GROW/DECLINE

WPSM analyses 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 bona fide data sources) helps us 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 near future. Of course, this data cannot be viewed in a vacuum. Unforeseen influences such as an infusion of funding (as we have seen from the federal government for infrastructure projects), changes to global nickel prices, precarious trade agreements and other factors can dramatically increase/decrease demand for specific occupations.

In last year's LLMP, we noted that changing demographics, particularly an increase in older adults across all three census areas is adding additional pressures on the healthcare system. This is especially true for long term care and assisted living which in turn is creating increased demand for Personal Support Workers (PSWs). Unfortunately, as a community, this need has not been addressed very well, nor have we treated PSWs well either. Local consultations and research by WPSM underscores the fact that the job of PSW is undervalued. This is further impacted by low wages, precarious work and declining enrollments in PSW training programs. This is why understanding demographic changes and LMI is so important. To create change we need to understand the data. More can be found on current PSW research by going to our website.

SKILLED TRADES WORKFORCE: in-demand survey

Although we have anticipated shortages across various skilled trades (due to retirements and declining enrollments), very little has changed in the last ten years. No one needed a crystal ball to see this coming as the data has been very clear. Efforts have been made by two provincial governments to "modernize" the apprenticeship system and to promote the trades, but impact has been minimal.

In late 2019, the ministry asked all workforce planning boards across Ontario to undertake a large research project to better understand: in-demand trades, projected shortages and the apprenticeship system. In addition to looking at the data, WPSM interviewed and surveyed over 100 employers across various trades along with key stakeholders in industry, education and business. At the time of writing the LLMP, the in-demand skilled trades report is not yet ready, so please check our website frequently. It is worth noting - the number one concern of almost all skilled trades employers is that there will be shortages. No surprise there, however what we do about it is an entirely other matter, though significant change is needed.

ONLINE JOB POSTINGS

WPSM subscribes to data from *Vicinityjobs* which collects job postings across various online job posting platforms. According to *Vicinityjobs*, their data represents approximately 50-55% of available jobs, as many area employers still use "word of mouth" or their informal networks to recruit.

As a result of recent changes in *Vicinityjobs'* data collection methods (to reduce possible duplications), WPSM is unable to draw any conclusions regarding number of jobs posted in 2018 and 2019 however the numbers are still very useful as is the data re: type of industry, location of job and occupation. In 2018, 10,599 jobs were posted for Greater Sudbury and 9,804 in 2019; for the Sudbury District, 353 in 2018 and 316 in 2019; and for the Manitoulin District, 193 in 2018 and 420 in 2019.

EO DATA (2018-2019)

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 requirements.

Client numbers are often driven by programs and funding available.

*****

GEOGRAPHIC AREAS
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

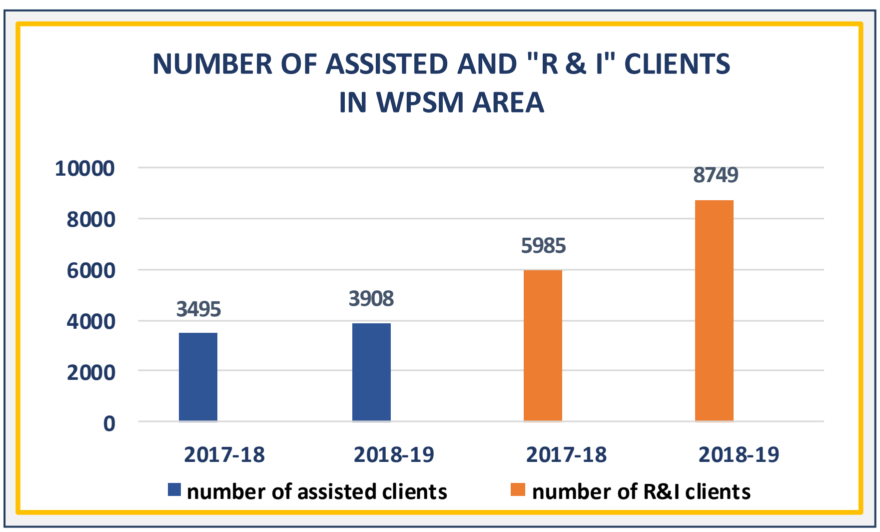
Data for this section of the labour market report is provided to WPSM by MLTSD (as noted earlier – formerly MTCU at the time of data collection) and includes data for the following programs: Employment Services; Literacy and Basic Skills; Second Career; and Apprenticeships.

A summary of consultations conducted with service providers is also included and covers the following from their perspective: employment trends; industry sectors that are hiring; jobs in demand; assistance provided to employers; changes in clients and client numbers; greatest challenges/barriers that are impacting on clients; and strategies that have been successful. Questions specific to the skilled trades and the apprenticeship system were also asked during this year's consultation.

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.

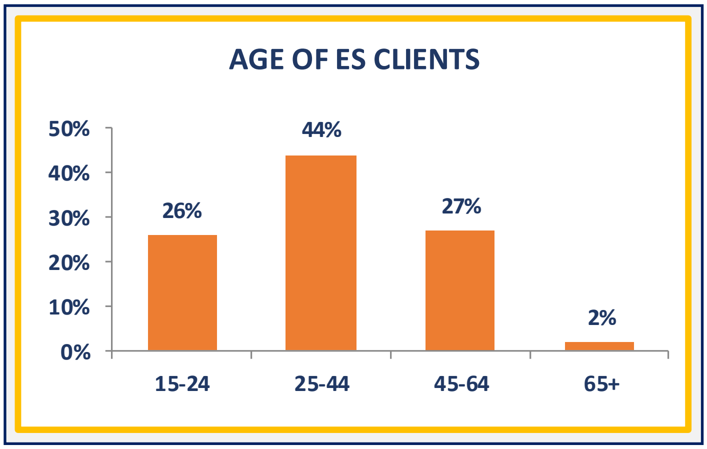
ES also provides Human Resources (HR) assistance to employers (i.e. screen/review applicant resumes; conduct interviews; etc.) however this service is not promoted or tracked by the ministry.



ES CLIENTS SERVED

Although ES clients decreased in 2017-18, the numbers jumped up in 2018-19. Local EO Service Providers feel this increase may reflect an increase in international students, immigrants and newcomers looking for work. Additionally, there has been an increase in the number of women and retirees seeking employment, those looking for a career change as well as highly barriered individuals wanting to work. During the consultations, Service Providers also reported a decline in youth – particularly a select group who prefer to only use online services and not meet face-to-face with an employment consultant. Service Providers see these trends continuing and feel that services they provide may need to be more adaptable.

ES CLIENTS BY AGE GROUP



While the profile of ES clients has changed, there were only slight changes in their ages. In 2018-19 there was a 3% increase in those aged 15-24; a 1% increase in those falling into the 65+ age category; and a 1% decrease in those between 45-64 years of age.

As previously noted in the limitations section, EO Service Providers continue to lament that MTLSD age categories are far too broad and do not match the age criteria for many of their programs to draw any conclusions. <u>This is an ongoing data challenge</u>.

ES CLIENTS BY GENDER

Across Ontario, ES clients continue to be evenly split across male and female, however in the WPSM area, 59% of ES clients are male and 41% are female. Service Providers feel that more males are looking for work because: they lost/left their job; need to supplement their retirement income; are bored with retirement. There are however more older women who also need a job as their retirement income is too low to live.

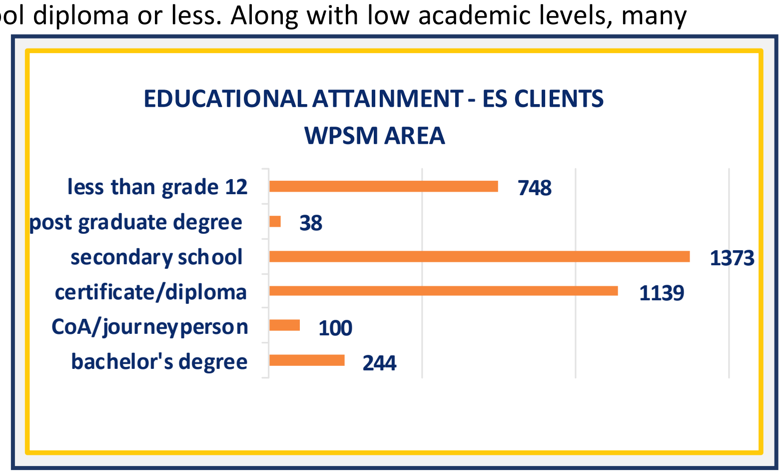
As noted in the previous report, a new category was added last year to include those who disclose they are *transgendered*. Less than 1% of all ES clients across Ontario (n=275) did - none in the WPSM area.

ES CLIENTS BY EDUCATIONAL ATTAINMENT

Lower education levels result in higher levels of unemployment and underemployment. In the WPSM area, 58% 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 Service Providers assess educational attainment, they also assess for transferrable skills and/or skills that may be outdated or no longer relevant in today's labour market. This is particularly true of older ES clients.

Educational attainment of ES clients across the WPSM Board area follows a similar pattern to northern Ontario and the rest of the province, however, 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 3,908 people that registered as an ES client in 2018-19: 608 identified as Aboriginal; 762 as Francophone; 123 as Internationally Trained Professionals; 116 as Newcomers; 466 as a Person with a Disability; and 100 as a Visible Minority. In other words, 56% or 2,175 identified with one of the designated groups as listed by MTCU. This represented an increase among all designated groups except for Newcomers and Visible Minorities – both of which experienced a slight decrease in those that disclosed.

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 2018-19 are as follows: 2,995 exited to employment (full-time; part-time; as an apprentice; or more than one job); 56 exited to employment and education/training; 485 went into education or a training program; 163 were unable to work; 267 remain unemployed. Remaining clients fell into the categories of: independent; volunteer, or unknown.

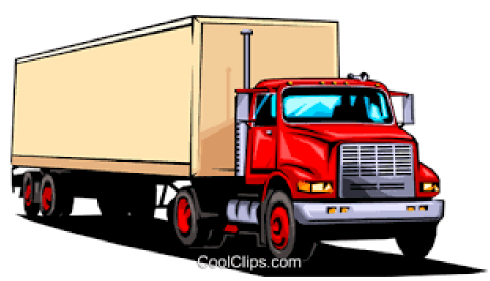
LITERACY AND BASIC SKILLS (LBS) DATA

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 at: http://www.tcu.gov.on.ca/eng/eopg/programs/lbs.html.

Total number of learners for 2018-19 for the WPSM area was 1,472 with 902 new in-person learners. Similar to previous years, slightly more women (56%) use LBS services. In terms of age of LBS clients in the WPSM area: 36% were 15-24 years of age; 41% were 25-44 years of age; 19% were 45-65 years of age; and 4% were 65 and older.

During intake, LBS clients are also asked 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: 307 for post-secondary (significant decrease from previous year of 565 clients); 323 for employment; 122 for independence; 93 for an apprenticeship; and 307 to obtain a high school credit. Although previously noted, obtaining a high school diploma is a necessary prerequisite to 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.

The number of SC clients in the WPSM area declined from 241 clients in 2017-18 to 184 clients in 2018-19. This follows a similar decline across the province from 5,379 clients in 2017-18 to 3,834 in 2018-19. Most clients are between 25-44 years of age and only 35% are female. As in previous years, most clients have been out of employment/training for less than 3 months.

Second Career is focussed on high-demand jobs. Transport truck driver continues to be the career most in demand with 36 clients being approved for skills training programs. Overall however, only 73 SC clients, in other words, only 40% went on to employment when they exited the program.

APPRENTICESHIP DATA

As noted below, the number of new and active apprentices in 2018-19 has increased which is good news as the numbers have been on a downward trajectory for the last few years.

TOP 10 NEW APPRENTICESHIP REGISTRATIONS AND NUMBER OF REGISTRATIONS		
SKILLED TRADE	2017-18	2018-19
Heavy duty equipment technician	89	110
Automotive service technician	72	67
Electrician/construction & maintenance	58	55
Powerline technician	52	78
Truck & coach technician	50	63
Industrial mechanic millwright	47	33
General carpenter	44	70
Hairstylist	36	46
Industrial electrician	36	35
Construction craft worker	24	33

Although skilled trades-related jobs still carry a persistent and somewhat negative stigma as a career pathway, others are beginning to see that skilled trades workers are valued and essential to our economy and our future. Who builds the new equipment for scientists at SNOLAB? Millwrights, electricians and plumbers do. Who built the schools and buildings we work in and the roads we use everyday? Skilled trades workers do.

The ministry's apprenticeship data shows that there has been an increase in number of new registrants from 2017-18 to 2018-19 across a number of trades (green signifies increase and red a decrease). Again, this is good news – not only due to the increase in new apprentice registrations, but the number of employers who are sponsoring/hiring an apprentice. Additionally, the average age of a new apprentice is 27 which may indicate an individual has already entered the workforce but is embarking on a new career path.

The number of active apprentices has stayed relatively stable over the last two years except for a decline across northern Ontario. From the in-demand skilled trades research that WPSM and other workforce planning boards across the province conducted over the last year, we know that there are few supports in place to help apprentices and that it is very challenging to find an employer/sponsor. This is even more challenging in rural areas where fewer employers with journeypersons are available.

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
New 2018 - 19	772	2,104	27,821
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
Active 2018 - 19	1,746	5,254	71,279

While we don't know how recent government changes will impact the skilled trades in the near future, it will be important to remain alert. Recent changes include: reducing the ratio for all trades to 1:1 – (one journeyperson to one apprentice); dissolving the Ontario College of Trades (unclear what will replace it); and undertaking a process to "modernize" the apprenticeship system. At a provincial level, modernization has been discussed over a number of years, but no one has specified what this will entail or how it will happen.

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 it. Grants such as the Canada-Ontario Job Grant (COJG) provides 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. Some smaller financial incentives such as the Apprenticeship Completion Employer Bonus are also available once an apprentice has been certified at: https://www.ontario.ca/page/hire-apprentice#section-3.

As noted, as grants, incentives and wage subsidies are constantly changing, it is of benefit for local businesses/employers to stay abreast of what is available to support their workforce attraction, recruitment and retention needs by visiting the Employment Ontario website as noted above.

CONSULTATIONS WITH EO SERVICE PROVIDERS

As noted throughout this report, the data only tells part of the story. Since local EO Employment Service Providers work directly with clients looking for work and employers looking for workers, WPSM consulted them to help supplement our data and to provide an on-the-ground perspective regarding current/emerging workforce trends, issues and challenges. Here are some of the questions that were asked and the answers that were provided.

1. What employment trends do you see happening?

- education system catering to students and not helping to prepare them for the reality of work
- continuing challenges with transportation to/from work/childcare (no G licence, no vehicle, poor/no public transportation options)
- lack of adequate, flexible and low-cost daycare (some agencies charge up to $8.00/minute if the child is picked up late-after hours)
- industry-specific trends: increased demand for PSWs, journeypersons and mining-related jobs; decrease in construction-related jobs
- challenges with EO services available for newcomers and refugees
- unrealistic wage expectations

2. What industries are hiring? And what kind of jobs are in demand?

- a wide range of occupations were reported during the consultations. Occupations in demand include: autobody and collision damage repairer; heavy equipment technician; retail worker; AZDZ driver; healthcare worker (PSW, dietary aid, DSW, housekeeping); hospitality industry staff (cook, server, bartender); bilingual administrative assistant; underground miner and diamond driller; millwright; machinist; metal fabricator; janitor; wide range of labourers; call center worker
- other notes: for some positions, although the individual is hired to work part-time, they end up working just below full-time hours with no benefits
- some employers have expressed concern that they are losing employees and are unable to compete with short-term, well paid contracts at CRA – employees who are hired believe these contracts will lead to full time employment, but they often don't

3. What do you help employers with?

- conducting needs assessments to identify their workforce needs
- employment/HR support – interviews, job matching, employment legislation, job fairs, COJG funding and training
- specialized training such as *Soft Skills Solutions* certification[1]

4. Are your client numbers increasing, decreasing, or changing and why?

- increase in:

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[1] *Soft Skills Solutions (Simcoe Muskoka Workforce Development Board): https://www.smwdb.com/soft-skills-solutions*

- *international students*, but unable to assist international students if they are still in school. EO Service Providers are able to provide access to information and resources but feel there are not enough support/resources at local post-secondary institutions to properly assist these students, many of whom hope to become Canadian citizens
  - *newcomers and refugees* looking for work, however there are some inconsistencies in terms of who can be served as a client based on their status
  - *immigrants and newcomers* who are willing to fill labour and lower paying jobs; have a willingness to work and are actively seeking jobs. However, more work needs to be done to educate both employers and immigrants re: Ontario legislation, working hours, fair wages, cultural differences, etc.
  - *other clients*: women who need to work; those looking for a career changes; highly barriered individuals (including those on OW-Ontario Works or ODSP-Ontario Disability Support Program); those who are new to the area; and retired individuals who want to go back to work
  - number of people requiring literacy and basic skills as well as soft skills training focussed on Canadian culture and social norms
  - customized job opportunities where you can connect with customers but work from home (i.e. call centres, medical transcription services, insurance companies)
  - number of available jobs, but clients don't "fit" employer's needs
- decrease in youth – some do not want to physically come into the office to meet with a Service Provider but prefer to use technology to fill in forms and apply for jobs online. EO does not receive ministry acknowledgment or assistance for helping clients this way

5. What are the greatest barriers for your clients?

- significant mental health issues (mental illness, social anxiety, family instability, complex life issues, poor social skills, addiction, criminal record, lack of resiliency, learning disability)
- youth with unrealistic wage expectations, demand for work/life balance
- parental interference (come in with their child for their interview and tell employer what hours their child can work)
- lack of soft skills; motivation; computer literacy; personal transportation or public transit; childcare; housing; language skills
- poor working conditions: lack of respect by employer; workplace bullying; lack of recognition that older workers may have physical limitations; employers not changing with the "times"; micro-management
- high employer expectations: only provide part time hours but full-time expectations; looking for 3-5 years experience but not willing to train; short-term contracts that don't lead to full time work
- those well suited for the trades may not meet academic requirements
- some may not have a means of transportation to/from the workplace – often public transportation options are not suitable
- apprentices who continue to fail their exam – few supports exist to help with exam preparation or challenging modules

6. What have you found to be most successful?

- client-centered, one-on-one assistance, honesty, counselling, matching approach to client goals
- customized training (Smart Serve, WHIMS, customer service, digital literacy, mock interviews)
- job matching and HR support including retention support and follow-up
- advocacy referrals to appropriate resources and services based on client needs
- stipends i.e. purchase of boots, haircut, bus passes
- good employer connections and good employers

7. **What skilled trades are in demand in your area?**
    - constant challenge matching trade programs that clients want to be trained in with trade demand
    - EO Service Providers feel the following trades are in demand: brick layer; machinist; truck and coach technician; millwright; heavy duty equipment technician; mining (including confined spaces); plumber; boilermaker; carpenter; welder; HVAC (heating, ventilation and air conditioning)

8. **How are employers recruiting journeypersons and apprentices and what challenges are they experiencing?**
    - employers are posting jobs on Kijiji; job bank and social media (i.e. Facebook)
    - students looking for work - EO Service Providers cannot assist students as a client if they are registered as a student; however, students can use the information and resource centre
    - EO services primarily focussed on barriered clients
    - OSAP students can only work a maximum of 10 hours per week without impacting their OSAP
    - not all journeypersons and/or employers treat apprentices well
    - lots of students who want to be hired as an apprentice, but not enough employers willing to hire
    - retention is a challenge as is showing up to work
    - lack of loyalty by employees and employers
    - as noted, employers looking for people who are fully certified and experienced – may need to lower expectations and provide training
    - employers fear poaching of apprentices they have trained and as a result, don't want to invest in training
    - employer challenges with paperwork required for an apprentice
    - trained AZ/DZ drivers are failing their driving test

9. **How could the apprenticeship system be improved?**
    - offer financial incentives to employers to hire apprentices
    - modernize the apprenticeship system
    - reinstate ministry consultants to reach out to employers – now falling on the shoulders of EO Job Developers, and many employers do not know about the EO services that exist
    - better accommodate apprentices by providing more hands-on testing when writing trades exam; provide more assistance with specific exam questions (not sections) that are challenging
    - address challenges with math conversions (metric to/from imperial)
    - eliminate or reduce cost of pre-testing modules which are meant to help with exam prep/writing
    - provide one-stop shop for all apprentice-related information and reduce red tape
    - introduce children to the trades at an earlier age

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 project 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 2019-20**: local MPs (Marc Serre and Paul Lefebvre); Mayor Bigger; mining company Presidents; Economic Outlook.	ongoing 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.	annual event hosted each January
LMI and support	Sudbury East Chamber of Commerce	Provide support, sponsorship and sharing of information on LMI issues, initiatives and resources.	ongoing as requested
Bridges to Better Business	Regional Business Centre	Sponsorship for this event.	Oct 2019
Senior's Summit	City of Greater Sudbury – Senior's Advisory Council	PSW survey results prompted the city to host two seniors' summits; attended by staff; provided ongoing support.	Oct/Nov 2019 ongoing
Indigenous workforce development	Kenjgewin Teg (KT)	Attended grand opening; continue to support the new trades innovation and training centre;	Sept 2019 as requested
	Gezhootjig Employment and Training	Provide LMI to support their work and offer to host consultations with staff each year	ongoing as requested
	Atikameksheng Anishinabek (Whitefish)	Career fair and resources as requested.	October 2019 ongoing
	Wii-ni n'guch-tood Employment & Training (Wikwemikong)	LMI support and assistance with on reserve workforce-related initiatives and research	as requested
Ongoing consultations	Rainbow Board OYAP committee; OTOC (our town/our city); others	Provide LMI and consultations on a broad range of workforce development-related topics	as requested
Employer information videos	LAMBAC; Weaver Simmons law firm; Gore Bay Fire Department; Occupational Health/Safety Consultant	Produced pilot-test videos for employers on succession planning and hiring/firing. Produce new video on managing a workplace injury and plan for launch of video series.	2 videos complete June 2020
Ontario Regional Sounding	Conference Board of Canada; Future Skills Centre	Participated in pre-consultation and staff attended two local/regional sounding boards events at College Boreal	Nov 2019 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
Rural Northern Immigration Pilot	City of Greater Sudbury	Provide LMI support to RNIP; participate in IRCC training and identification of selection criteria	ongoing
Matchmaker	Northern Policy Institute; Chamber of Commerce	Supported the matchmaker program focussed on matching francophones with local industry needs and employers	complete

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
PSW workforce taskforce	Northeast Local Health Integration Network	Participate as member of the taskforce with local health partners and on two subcommittees addressing working conditions and human capacity; participated in community event hosted by the NELHIN on PSWs	event- June 2019; activities ongoing
Addressing shortages in the PSW workforce	Employment Support Services – City of Greater Sudbury; local colleges; PSW employers	Continue dissemination of PSW survey results which has let to interest across the WPSM area and with other organizations (Ontario Health Coalition; Unifor; Ontario Centre for Learning, Research and Innovation). Plans with partners to co-host event with CGS for employers.	continue dissemination; event planned for 2020
Manitoulin – PSW shortages	LAMBAC; Employment Options	Similar to other areas, Manitoulin is experiencing a shortage of PSWs only to increase due to an aging population. Actions will include hosting several meetings with key stakeholders and identifying a strategy to address current and future shortages.	meeting to commence in 2020; ongoing to completion
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.	ongoing
Human capacity research project	NPI (Northern Policy Institute)	Supported NPI research re: human capacity and changing demographics that may impact on the workforce in WPSM area in the future	complete
Modern Mining and Technology Sudbury (MMTS)	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.	June 2020 annual support
Construction sector jobs and municipal infrastructure projects	Northeastern Ontario Construction Association; Carpenters Union; and other stakeholders	Presented results of the Sector Planning Partnership report to city officials (no uptake); presented results to Municipal Advisory Committee (GSCC); continue to promote a CBA (community benefit agreements) to promote hiring local.	report complete; continue to promote CBA
FONOM (Federation of Northern Ontario Municipalities) conference	Labour Market Group; Far Northeast LEPC; Algoma Workforce Innovation Corporation	Participate in tradeshow at FONOM in Timmins targeting municipal leads (mayors, council members, economic development, CEOs) to highlight LMI across the northeast.	May 2020
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
Skills Catalyst Fund	YMCA Employment and Immigrant Services; Employment Options; Science North; Professions North/Nord	Four separate organizations requested letters of support and WPSM partnership for their individual projects related to the Skills Catalyst Fund. WPSM provided initial guidance re: relevant LMI and will support each project as appropriate.	March 2021
Government outreach	WPSM initiated	Presentations to local MPs, MPPs, Mayors, City/Town Council members, economic development leads, etc.	ongoing

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
Occupations projected to grow/decline	WPSM led	Continue to conduct analysis of OMFRA/EMSI Analyst data to identify occupations projected to grow/decline for each census area; share results.	ongoing
Workforce Planning Ontario (WPO)	All local boards and LEPCs in Ontario	Attend provincial meeting to discuss: provincial issues, challenges, and policies re: workforce planning in Ontario. Bring northern perspective to the table.	June 2020
ICT/High tech industry	WPSM led; NORCAT	Reports on: a) occupational analysis of jobs in the IT sector and those currently employed and b) results of research and survey of ICT/high tech employers re: staffing demographics, hiring needs/practices; and training requirements.	first report complete; 2nd report April 2020

Agriculture industry	Various leads: OMAFRA, LAMBAC, Northern Ontario Farm Innovation Alliance	Participant: food and agricultural conferences; agriculture roundtable consultations; international agricultural event; discussions re: large animal vet shortages.	ongoing participation and support
Online Job vacancies research	Vicinityjobs.com, EO Employment Services, school boards, colleges	Quarterly reports using online job vacancy data to identify types of occupations being posted and by which industries. Complete year-in-review report. Continue outreach with employers identified. Share with partners regularly.	quarterly and annual reports, March 2019-20 ongoing
Trades workforce research	WPSM led	Analysis of OCoT data (June 2018) re: age, number and gender of journeypersons and apprentices in the WPSM area; report to compare results between 2016-18.	complete
Trade union projections research	WPSM led; support of local construction unions	Researcher conducted interviews with construction trade unions to understand current/projected workforce needs.	complete
Automation/technology impact on workforce	WPSM	Continue to review/research automation and technology changes and impact on the workforce across all industries.	ongoing
Jobs of the Future	Northern Life	Feature section on jobs of the future; can we predict jobs of the future? and what employers are looking for	complete
Northern immigrant attraction and retention strategy	FEDNOR; local boards and LEPCs (northern Ontario)	Produce a baseline of occupations in demand from various LMI data sources and research for FedNor to support their Immigration strategy	June 2020; ongoing updates
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 never they hear from; explore impact on jobseeker and their mental health/job search motivation	December 2020

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. Research: use of various data sources; interviews with local employers and stakeholders; online survey. Preparation of local report for local community (colleges, employers, etc.)	MLTSD report complete; March 2020
Apprenticeship consortium - pilot	Ontario Electrical League; Support Ontario Youth; local colleges	Participate on an advisory committee - local consortium of non-union electrical workers and local colleges; despite no uptake in Sudbury will continue to participate.	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	December 2020
Education Coordinating Team (ECT) – industry liaison	Area school boards; post secondary institutions; and employment services	Provide opportunities to increase ECT's knowledge re: employer needs - to better align education and industry; past events: tour of Carpenter's hall; UA local 800; LiUNA; water/waste treatment plants and presentation by BMW; Future industry tours: transportation; auto, agriculture	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 2020
Online job portal	City of Greater Sudbury – Economic Development; GSCC	Partnership to develop an online job portal (free for employers to post jobs). Participate in portal promotion to employers and analyze employer data. Delayed by city.	delayed December 2020
Employment Ontario (EO) network	WPSM lead	Consultations with EO services on EO data, LMI, EO network challenges and needs of employers and jobseekers; promote EO services and LMI resources.	various consultations each year
Soft skills	Employment Options (Little Current and Espanola); local employers	Produce 2 videos in each area highlighting local employers and the skills they are looking for when they hire. Focus will be on soft skills such as showing up to work on time	ongoing use by EO with clients

Are we ready for the future?

Every year, we ask ourselves this question – are we ready for the future? This question actually leads to more questions as there are so many unknowns. As indicated in previous reports, no one has a crystal ball; all we can do is make an educated guess that is based on history, economic trends, local LMI data, a sense of where the economy might grow in the future and jobs that are needed to support that growth. Anyone who says they can predict 10-15 years out is only making an educated guess as no one really knows for sure.

It is also important to point out that a lot of the economic forecasts and federal/provincial level labour market-related reports that are used, are often not relevant to local economies, local industries or local needs. While what is happening globally, across North America, across Canada or even across Ontario may have an impact, these impacts are often an academic exercise and not generalizable across all communities, particularly those in northern Ontario.

Change is happening in the blink of an eye in the way we do business, the way we teach our children, the jobs that currently exist, the technologies that are emerging and even our commitment to one employer in our lifetime. There is no one single predicter, but what we do know is this. As we have said in the executive summary, we are moving into an age of fluidity in the workplace. We need to have the tools to be adaptable, flexible, ready to change and willing to be trained, retrained or reskilled. These are not skills that are taught, but a way of responding to the tsunami of changes that we are seeing.

More questions. How can we train for jobs that we don't even know will exist? Better still, how do we continue to shift and change without eroding some of the core skills and values that are needed to make our society function, help our industries survive and thrive, and keep good jobs from disappearing? Can we keep them from disappearing?

Employers are treading these same murky waters. Willingness to change and be flexible and adaptable also apply, as many are not ready for the workforce coming before them or the shortages that are anticipated. Some employers still fall short of providing equitable opportunities (and wages) for women, and some are ill prepared or unwilling to consider opportunities to hire Indigenous people, immigrants and persons with disabilities – all people willing to not only work but work hard. And still further, some are unwilling to help train our future workforce and don't give apprentices or graduates a chance to gain experience – some say it is not their job. But if it is not their job, then whose is it? And how can we do a better job?

On the other end of the spectrum, there are other employers who invest time, resources and energy into planning for the future of their business and their workforce. Those are the ones who provide opportunities such as apprenticeships and internships. They may also train or upskill their staff and open doors to new technologies to improve safety and efficiency. We all know this may impact on jobs in the future, but it is part of being ready for continuing change.

One thing to keep in mind as we look at our workforce. We still need people to look after those who are ill or elderly, to teach our children, to police our communities, to move our commodities and to build and fix our roads, bridges, buildings, houses, towns and cities. These jobs and many other good jobs are not disappearing. They may shift and change with new technologies, but that is why we need to remain flexible, adaptable and willing to shift and change as needed.

So back to our original question – are we ready for the future? I am not sure if we can ever be completely ready, but we can be prepared by being adaptable and flexible to the changes that might or might not come.

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 Training and Colleges
Ministry of Labour, Training and Skills Development
Ministry of Education
Northeast Local Health Integration Network

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

LABOUR:
Various unions/locals

ASSOCIATIONS:
BuildForce Canada
FONOM (Federation of Northern Ontario Municipalities)
Northeastern Ontario Construction Association
Ontario Construction Secretariat
Ontario Electrical League
Ontario Health Coalition
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):
Architecture and Engineering
Construction
Education
Environment/Green
Health, hospitals and long-term care
Information Technology/High Tech
Manufacturing
Mining and mining supply services
Retail
Transportation/Logistics

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
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)
Hardline Solutions
MIRARCO (Mining Innovation Rehabilitation and Applied Research Corporation)
NPI (Northern Policy Institute)
SOY (Support Ontario Youth)
NORCAT

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

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Notes