Local Labour Market Plan

Update

October 2013

A Regional View of Priorities & Trends in Labour Force Development

Mission Statement - *We build positive and lasting collaborations to identify community need, facilitate solutions, and advocate for the development of a skilled, inclusive and adaptive labour force in the counties of Prince Edward, Hastings and Lennox & Addington.*

The East Central Ontario Training Board (ECOTB) is part of a Local Board Network, comprised of 25 Local Boards across Ontario. ECOTB is governed by a volunteer board of directors and has a jurisdiction of Hastings, Prince Edward and Lennox & Addington counties.

This 2012 Local Labour Market Plan is funded by the Ministry of Training, Colleges and Universities as part of an agreement with ECOTB to conduct local labour market planning and partnership development as a means to address local challenges and priorities in the region. The report provides an update on the issues and activities related to labour force, the population and local industries and occupations.

ECOTB would like to *Thank* all of the individuals, organizations and companies that provided the information included in this document. Additionally, we would like to acknowledge the guidance and resources provided by Employment Ontario, Ministry of Training, Colleges and Universities.

The Government of Ontario funds this Employment Ontario project. The views expressed in this document do not necessarily reflect those of Employment Ontario.

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Executive Summary

This Local Labour Market Plan Update (LLMP) forms part of an overall strategy to develop and implement 'evidence-informed' planning and activities that address local labour market challenges and take advantage of local opportunities. It combines external information in the form of data analysis and research, with local experience, judgement and expertise to develop new, and report on existing 'strategic actions' in response to identified community priorities.

This report focuses on the counties of Hastings, Prince Edward (PEC), and Lennox & Addington (L&A). A base profile of the region was developed using 'Local Labour Market Indicators' derived from a variety of data sources with a focus on the most current and local data, including: the Census (2006, 2011), Canadian Business Patterns (2012, 2013), National Household Survey (2011) and the Ontario Labour Market Adjustment Data. While ECOTB makes every effort to access the most current data, data by its nature is dated, some more than others. Projecting our future labour force needs can be challenging, since a number of significant factors are converging. An aging population, slower population growth, the threat of a diminishing labour supply, the globalization of the marketplace and technological transformations are having profound effects upon how we train, recruit and manage labour (talent). This document examines some of the local priorities for the ECOTB region and identifies emerging trends that are impacting upon the development of a skilled and adaptable local labour force.

Overview

The economy both nationally and locally has experienced a steady but slow recovery since the latest recession. However, Erin Weir, labour economist of the United Steelworkers Union, feels that there is a lack of job creation by employers. He states "Since the recession, Canadian employers have added barely enough jobs to keep pace with population growth." This reluctance of employers to hire and move forward could reflect a general apprehension regarding both our and the US economies, and/or an inability to find qualified workers. In addition, it could be a product of a general unwillingness to invest in new hires and training/reskilling of existing workers. Bank of Canada Governor Mark Carney also chastised Canadian employers for '*sitting on piles of cash instead of pursuing growth opportunities*'. No matter how much capital investment occurs, without adequate training and education, employers and their employees will be unable to realize the full potential of that investment.

> *'Since the recession, temporary work has grown at more than triple the pace than permanent employment – up 14.2 percent between 2009 and 2012, versus 3.8 percent for permanent workers – Canada's shift to a nation of temporary workers.'*
> *Tavia Grant, Economics Reporter, Globe and Mail March 8th, 2013*

Research indicates a trend towards employers seeking just-in-time talent coupled with a preference for hiring on a temporary or contractual basis. This can offer employers access to a more flexible workforce and can leave them more agility in responding to a shifting economy. Although this may suit some individuals, for many workers this precarious or 'contingent' work (defined as an employment status that lacks security or benefits) can led to personal strains, including the inability to plan or save for the future, or even make ends meet.

> *'Many employees are currently sacrificing advancement for job security.'*
> The New Employment Deal, Insights from the 2010 Global Workforce Study
> Towers Watson

A joint 2013 study by McMaster University and the United Way found that people in insecure work tend to earn 46 percent less than those in secure positions, and rarely receive benefits. According to Wayne Lewchuk, Professor of Labour Studies at McMaster University, "You're either a winner or loser in this labour market. The clear winners are those with great, stimulating, well-paid jobs. But the others exist in a treadmill of insecurity, with little training and a limited career path, which in turn makes it difficult to maintain relationships, buy houses, engage in the community or get established in life."

There appears to be a core imbalance within our labour market evidenced by an abundance of job seekers coexisting with a shortage of skilled workers. While 62 percent of Canadians now achieve some form of post-secondary education (apprenticeship, college, university) many post-secondary graduates are completing their education in areas that do not correspond to the demands of the labour market. As a result many are finding themselves unemployed or employed in jobs for which they are overqualified (underemployed). Both unemployment and underemployment waste precious resources and produce substantial social, human, health, and economic costs.

While there are many intrinsic positives to achieving a higher education, if an expectation is to gain employment than we must closely examine the career preparedness of our youth. Schools and industry must develop stronger linkages to help young people draw clearer sight-lines between their education and the labour market. Youth require current information regarding employment and income prospects of specific programs and disciplines. Post-secondary institutions must be agile in assessing and adjusting programs and curricula to better reflect the future realities of the labour market and economy.

While the highly educated youth appear to receive considerable media coverage and concern regarding their employment plight, the youth who are in the greatest need of supports are those that have lower educational attainment since they have fewer employment options and face stiff employment competition from their more educated peers. Another group that merits more consideration are older displaced workers, since many need to retrain and/or reskill for today's job market, in addition to facing hiring issues of ageism, and having financial obligations due to child or elder care, mortgages, etc. These working age adults need access to a wide spectrum of full- or part-time learning activities to develop their skills to meet the changing demands of the labour market. One approach, a retraining program offered by the Ministry of Training Colleges and Universities, Second Career, is proving to be successful in meeting this need. Locally the majority of Second Career clients are over 25, 58% are between 25 and 44 years, and a further 29% are in the 45 to 64 age range. (Source: Employment Ontario data – August 2013)

Over the past year, each of the counties experienced some growth, however only Prince Edward exceeding the provincial rate. Small businesses, those employing less than 50 workers, continue to dominate the region. The majority (over 20%) of employment continues to be in the Sales and Service sector. This is further supported by the fact that recent data reveals that the majority of Employment Services' clients find employment in the Retail and Accommodation and Food Services sectors. Unfortunately, many of these jobs can be lower paid, offer limited opportunities for advancement, with few benefits if any, provide little or no job security, and are typically characterized by high turnover.

However, a recent Manufacturing Study conducted by the Quinte Manufacturing Resource Centre and Quinte Economic Development Commission paints a more optimistic picture for the region. Interviews with local employers revealed a general optimism with most contemplating positive growth. Employment in this sector can run the full gamut of qualifications from entry level to advanced degrees, and generally, offers more secure and higher paid employment. However, many employers interviewed for this study expressed concern regarding their ability to find qualified workers. Several pinpointed 'work ethic' and workplace or 'soft' skills as lacking in their job applicants. In fact, 100 percent of the respondents felt that 'soft' skills were extremely important and in many cases more important than technical skills. Many commented that it was easier to teach their employees the technical skills, while with the soft skills they were dealing with behavioural traits that they were less proficient at dealing with. They identified their top labour force challenges as:

- negative perception of manufacturing as a viable career
- aging workforce
- rural Ontario not considered as a destination for employment
- upgrading the skills of the current labour force.

Not surprising, the employers identified their top three challenges to providing training as, finding time for employees to attend training, loss of productivity and cost. Ninety percent of those survey agreed that ongoing training and education were critical to the success of their operation. However, 48 percent spend less than one percent of their revenue on training, and 35% spent between 1 and 5 percent. Research confirms that this lack of employer investment in the development of their labour force to be widespread across industry sectors and geographies. Meanwhile, there is considerable evidence that workforce education yields higher gains in productivity, and has a positive influence on job satisfaction and employee commitment and loyalty.

A 2013 Conference Board of Canada study found that business investment in employee training has declined by 40% since its peak in 1993.

Local Labour Market Conditions

Small & Medium Business – June 2012- 2013

The change in the number of employers by employee size range was examined and compared to that of the province. When the local number of employers is growing faster than that of Ontario, this suggests that the local demand for labour may exceed that of the province. This in turn suggests relatively higher labour mobility within the local area. As a result, a local worker may find employment more easily within the region rather than outside it. Additionally, workers outside the area may be attracted to the region. Conversely, when the growth rate is slower than that of the province, local workers may be tempted to search for employment outside the region.

Overall, all three counties experienced gains in the total number of employers, with PEC enjoying an increase of 10.51% surpassing the provincial average of 8.37%.

County	Number of Employers 2012	Number of Employers 2013	Absolute Change	% Change	Ontario % Change
Hastings	7,493	7,590	97	1.29	8.37
Lennox & Addington	1,861	1,956	95	5.10	8.37
Prince Edward	1,713	1,893	180	10.51	8.37

Source: Statistics Canada, Canadian Business Patterns Data, June 2012, June 2013

Number of Employers by Employee Size Range, June 2012 – June 2013

Firms are divided into size categories according to the number of persons they employ. Small and medium sized enterprises (SME) range in size from owner-operated (self-employed) to companies with up to 99 employees. Businesses with fewer than 100 employees collectively represent a significant share of the total employment base for the region, and they can be a source of the next generation of larger enterprises. SMEs are the economic drivers of the economy both locally and nationally. SMEs are primarily responsible for economic growth and renewal and, with support have the potential to grow into larger enterprises.

In the region, the number of owner-operated enterprises dominates the local economy, Hastings (48%), Lennox & Addington (52%) and Prince Edward (55%) respectively. In Hastings 85% of the businesses employ less than 20 people, the number is slightly higher for Lennox & Addington at 89%, and even higher in Prince Edward at 91%. This is worthy of attention since firms of this size often lack human resources and financial capacity, as a result can be more vulnerable to economic downturns. Overall, each county experienced growth over the last year, with Prince Edward outpacing even the province.

Hastings County					
Employee Size Range	**# Employers 2012**	**# Employers 2013**	**Absolute Change**	**Hastings Change (%)**	**Ontario Change (%)**
0* (Self Employed)	3,433	3,661	228	6.64	10.97
1 - 4	2,081	1,984	-97	-4.66	6.94
5 - 9	890	839	-51	-5.73	2.92
10 - 19	566	588	22	3.89	2.84
20-49	331	329	-2	-0.60	3.76
50-99	108	107	-1	-0.93	2.05
100-199	48	46	-2	-4.17	2.07
200-499	30	29	-1	-3.33	1.75
500+	6	7	1	16.67	-0.19
Total	**7,493**	**7,590**	**97**	**1.29**	**8.37**

Lennox & Addington County					
Employee Size Range	**# Employers 2012**	**# Employers 2013**	**Absolute Change**	**L & A Change (%)**	**Ontario Change (%)**
0*	926	1,013	87	9.40	10.97
1 - 4	528	511	-17	-3.22	6.94
5 - 9	211	225	14	6.64	2.92
10 - 19	103	111	8	7.77	2.84
20-49	57	61	4	7.02	3.76
50-99	23	22	-1	-4.35	2.05
100-199	8	6	-2	-25.00	2.07
200-499	3	5	2	66.67	1.75
500+	2	2	0	0.00	-0.19
Total	**1,861**	**1,956**	**95**	**5.10**	**8.37**

Prince Edward County					
Employee Size Range	**# Employers 2012**	**# Employers 2013**	**Absolute Change**	**PEC Change (%)**	**Ontario Change (%)**
0*	909	1,039	130	14.30	10.97
1 - 4	471	487	16	3.40	6.94
5 - 9	163	193	30	18.40	2.92
10 - 19	95	99	4	4.21	2.84
20-49	54	55	1	1.85	3.76
50-99	14	14	0	0.00	2.05
100-199	5	5	0	0.00	2.07
200-499	2	1	-1	-50.00	1.75
500+	0	0	0	0	-0.19
Total	**1,713**	**1,893**	**180**	**10.51**	**8.37**

Source: Statistics Canada, Canadian Business Patterns Data June 2012, June 2013

Distribution of Top Industry Sectors

The following tables show the top growth SME employment sectors by 3-digit industry classification (NAIC) for the counties of Hastings, Lennox & Addington and Prince Edward, using June 2012 and 2013 Canadian Business Patterns data. The local ‘distribution’, or significance, is then compared to that of the province. The long term shift in Canada’s economy from goods-producing to service-producing is reflected locally by the significance and growth in the ‘541 - Professional, Scientific and Technical Services’ in all three counties. In general, these are considered higher paying jobs that require more formal education. The three counties still trail the provincial distribution significantly for this sector.

A continued local construction and real estate boom is reflected in the relatively high ranking of ‘238 - Specialty Trade Contractors’, ‘531 - Real Estate’, and ‘236 - Construction of Buildings’ in all three counties. In particular, the Specialty Trade Contractors Sector represents a considerably greater distribution rate than that of the province. This often translates into some very skilled and well paid employment; however, it can also be influenced by the seasonality of the construction sector. As a note, the importance of ‘Real Estate’ should be tempered slightly with the knowledge that this sector represents mainly commission sales, can be part time work and often exhibits considerable ‘churn’ in employment.

The importance of the agricultural and local food movement in the local economy is evidenced by the relative importance of ‘111 – Crop Production’ and ‘112 – Animal Production’ in all three counties, and in particular when compared to the provincial distribution rate. Many of these jobs can be lower paying and seasonal in nature. Yet, it is important to note that the local agricultural sector is influential in many other sectors such as, Food Service, Retail, Tourism and Manufacturing (food processing). However, while Animal Production remains significant in the region, it is noteworthy that this sector is in decline in all three counties. This could reflect a number of trends including, smaller dairy herds being replaced by larger operations, increased feed prices, a very poor 2012 forage harvest, and the aging/retirement of the owner operators.

Locally, Tourism continues to be influential, as shown in the relative importance of ‘722 Food Services & Drinking Places’ in all three counties. Employment in this sector is often entry level, relatively low paying with fewer opportunities for advancement, and is influenced by seasonal demand. As a result, these workers can be less attached to the labour force. However, employment in this sector should not be undervalued since it can provide an important role in local labour force development by cultivating workplace skills and experience that will prove beneficial in any career. Unfortunately, those workers with lower educational attainment are often relegated to remain in these lower paying and less secure positions.

The continued growth and relative importance of ‘621 Ambulatory Health Care Services’ reflects the local demographics of an aging population. Indeed, this is reflected in the provincial rate as well.

Hastings County Top Industry Sectors by # of Businesses					
NAICS	Hastings 2012	Hastings 2013	Change	Hastings Distribution %	ON Distribution %
531 - Real Estate	700	788	88	10.38	10.58
541 - Professional, Scientific & Technical Services	585	626	41	8.25	15.07
238 - Specialty Trade Contractors	628	619	-9	8.16	6.48
621 - Ambulatory Health Care Services	327	367	40	4.84	4.79
722 - Food Services and Drinking Places	308	311	3	4.10	3.46
236 - Construction of Buildings	298	297	-1	3.91	3.66
484 - Truck Transportation	276	288	12	3.79	3.74
561 - Administrative and Support Services	301	263	-38	3.47	4.12
811 - Repair and Maintenance	270	254	-16	3.35	2.36
813 - Religious, Grant-Making, Civic, & Professional & Similar Organizations	220	227	7	2.99	2.36
523 - Securities, Commodity Contracts, & Other Financial Investment & Related Act.	224	217	-7	2.86	4.08
112 - Animal Production	289	212	-77	2.79	1.64
111 - Crop Production	80	201	121	2.65	1.98
812 - Personal and Laundry Services	172	162	-10	2.13	1.97
445 - Food and Beverage Stores	156	154	-2	2.03	1.51

Lennox & Addington County Top Industry Sectors by # of Businesses					
NAICS	L & A 2012	L & A 2013	Change	L & A Distribution %	ON Distribution %
238 - Specialty Trade Contractors	204	196	-8	10.02	6.48
541 - Professional, Scientific & Technical Serv.	162	167	5	8.54	15.07
531 - Real Estate	121	163	42	8.33	10.58
236 - Construction of Buildings	102	115	13	5.88	3.66
112 - Animal Production	128	109	-19	5.57	1.64
811 - Repair and Maintenance	75	84	9	4.29	2.36
484 - Truck Transportation	74	80	6	4.09	3.74
111 - Crop Production	33	67	34	3.43	1.98
722 - Food Services and Drinking Places	59	67	8	3.43	3.46
621 - Ambulatory Health Care Services	43	65	22	3.32	4.79
561 - Administrative and Support Services	73	59	-14	3.02	4.12
445 - Food and Beverage Stores	52	50	-2	2.56	1.51
813 - Religious, Grant-Making, Civic, & Professional & Similar Org.	48	48	0	2.45	2.36
523 - Securities, Commodity Contracts, & Other Fin. Investment & Related Act.	42	44	2	2.25	4.08
551 - Management of Companies & Enterprises	37	38	1	1.94	3.56

Prince Edward County Top Industry Sectors by # of Businesses					
NAICS	PEC 2012	PEC 2013	Change	PEC Distribution %	ON Distribution %
531 - Real Estate	146	190	44	10.04	10.58
541 - Professional, Scientific and Technical Services	169	177	8	9.35	15.07
111 - Crop Production	65	132	67	6.97	1.98
238 - Specialty Trade Contractors	120	124	4	6.55	6.48
236 - Construction of Buildings	80	111	31	5.86	3.66
112 - Animal Production	145	97	-48	5.12	1.64
621 - Ambulatory Health Care Services	64	78	14	4.12	4.79
722 - Food Services and Drinking Places	52	66	14	3.49	3.46
811 - Repair and Maintenance	47	63	16	3.33	2.36
561 - Administrative and Support Services	59	61	2	3.22	4.12
721 - Accommodation Services	50	57	7	3.01	0.52
484 - Truck Transportation	51	54	3	2.85	3.74
523 - Securities, Commodity Contracts, and Other Financial Investment and Related Activities	46	51	5	2.69	4.08
813 - Religious, Grant-Making, Civic, and Professional and Similar Organizations	52	50	-2	2.64	2.36
453 - Miscellaneous Store Retailers	36	39	3	2.06	0.98

Source: Statistics Canada, Canadian Business Patterns Data, June 2012, June 2013

The 2011 National Household Survey provides information on occupations using the National Occupation Code (NOC) categories. The tables below show the distribution of these occupations by county. Sales and Service occupations dominate the area; this is further supported by the Employment Ontario Data *(see page 12)* as one of the top employment destination for their clients.

Occupation Sectors	Hastings		L & A		PEC	
Sales and Service	14015	23%	4360	23%	2380	22%
Trades, Transport And Equipment Operators & Related	10515	17%	3480	18%	1880	17%
Education, Law And Social, Community & Government Services	8520	14%	2530	13%	1275	12%
Business, Finance & Administration	7955	13%	2875	15%	1240	11%
Management	6655	11%	1960	10%	1480	14%
Manufacturing And Utilities	4210	7%	925	5%	585	5%
Health	3900	6%	1345	7%	850	8%
Natural And Applied Sciences & Related	2815	5%	1010	5%	465	4%
Art, Culture, Recreation &Sport	1355	2%	355	2%	385	4%
Natural Resources, Agriculture & Related Production	1070	2%	340	2%	350	3%
Total	61,000	100%	19,175	100%	10,890	100%

Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011051

Population Dynamics

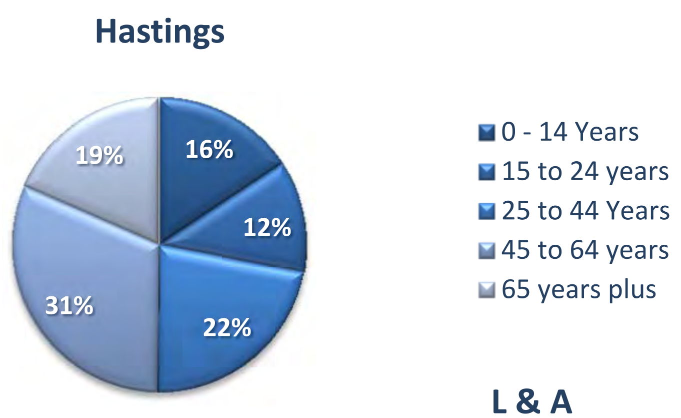
Increase in the local population is the definitive driver of labour market supply, and a key factor in the demand for certain categories of workers. Prince Edward County has experienced a decline or negative growth rate. When the Toronto CMA (Census Metropolitan Area) is removed from the Ontario statistics, the provincial population growth rate is 3.1%. Prince Edward County is the only portion of the region that is lagging the province.

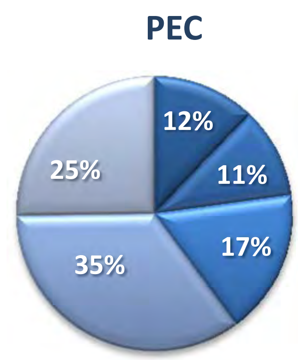
Population Change 2006 - 2011			
Location	**2006**	**2011**	**Population Change (%)**
Hastings County	130,474	134,934	3.4
L & A County	40,542	41,824	3.2
Prince Edward county	25,496	25,258	-0.9
Ontario	12,160,282	12,851821	5.7
Ontario minus Toronto CMA*	7,047,133	7,268,697	3.1

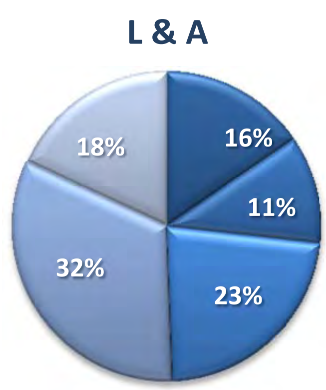
*Census Metropolitan Area

Population Age Characteristics

The following charts show the age breakdown of the local population. The population of the region is older than that of Ontario, with Prince Edward County's median age being the most significant at 11 years older, 51.6 compared to 40.6 years.







2011 Canada Taxfiler

ECOTB continues its annual analysis of local area income and economic dependency statistics using information derived from Statistics Canada Taxfiler Profile data. This analysis provides insight into the economic wellbeing of the region's residents. There is approximately a two year delay in the reporting of taxfiler data, as a result the most recently released data, 2011, was used for this report. Analysis of the corresponding indicators for the province of Ontario served as a benchmark for the interpretation of the regional indicators.

Average Incomes- 2011

Geography	Employment Income		Wages, Salaries Commissions		Self-Employment	
	$	**%**	**$**	**%**	**$**	**%**
ONTARIO	$43,853.39	100	$44,996.86	100	$18,146.95	100
ECOTB Region	$34,417.90	78.5	$35,949.74	79.9	$10,871.66	59.9

Source: Statistics Canada, 2011 NID Table 4 CD City Totals

In every income category the region trails the province by a significant margin. This is most notable is in the self-employment category, where the region's entrepreneurs have an average income of less than sixty percent of that of their provincial counterparts. However the average self-employment income levels for both the province ($18,146.95) and the region ($10,871.66) are far below a 'living' wage and could imply that many are self-employed by necessity rather than choice, as a result of being unable to find conventional paid employment.

Economic Dependency Indicators - 2011

Geography	Total Government Transfers		Employment Insurance Benefits		Social Assistance Benefits	
	# of Taxfilers	% of Taxfilers	# of Taxfilers	% of Taxfilers	# of Taxfilers	% of Taxfilers
ONTARIO	8,614,560	88.4	797,850	8.2	615,640	6.3
ECOTB Region	141,550	90.8	14,080	9.0	12,520	8.0

Geography	CPP Benefits		OAS Benefits	
	# of Taxfilers	% of Taxfilers	# of Taxfilers	% of CPP Recipients
ONTARIO	2,220,350	22.8	1,796,700	80.9
ECOTB Region	50,570	32.4	38,040	75.2

In most of the Economic Dependency categories, the region has a higher percentage of taxfilers in receipt of Government Transfers. Total Government Transfers have increased both provincially and regionally from the 2010 Taxfiler data. Overall this could reflect the effects of an aging population that is retiring and therefore creating a greater draw on CPP and OAS. While the region continues to significantly outpace the province in the receipt of Social Assistance Benefits, both have remained stable from the 2010 data. The Employment Insurance Benefits have dropped in both geographies, however this may not necessarily be a positive indicator, since it could reflect prolonged unemployment where many individuals have exhausted their benefits and are no longer eligible. The CPP and OAS Benefits show only a very slight gain from the previous year. The significant gap between the CPP rate regionally and provincially, is primarily a reflection of the region's relatively older population.

Employment Ontario Data

This year ECOTB has access to data regarding local services provided by the Employment Ontario and Literacy & Basic Skills Service Providers. This data will be examined in detail with the agencies. The tables below provide some insight into the makeup of the client groups and their employment destinations.

Employment Services (ES) Clients			
	ECOTB Area	Eastern Region	Ontario
ES Assisted Clients Total	**3,716**	**30,684**	**184,947**
15 - 24 yr.	958	7,192	39,027
25 - 44 yr.	1,603	13,545	87,027
45 - 64	1,122	9,697	56,634
65 Plus	33	249	1,429
Female	1,811	14,619	90,803
Male	1,905	16,048	93,645

In all three regions, the majority (45%) of clients are in the 25-44 age range, followed by the 45 – 64 year olds (31%). The genders were evenly represented with males only slightly edging female clients, 51% to 49%

Employment Services Clients			
	ECOTB Area	Eastern Region	Ontario
ES Assisted Clients Total	3,716	30,684	184,947
Newcomers	24	1,514	15,918
Visible Minority	50	2,135	17,833
Person with Disability	296*	2,128	7,906
First Nations	103	703	4,536
Internationally Trained Professionals	97	2,950	35,239
Total	**570**	**9,430**	**81,432**

Local Service Providers serve proportionately higher numbers of Persons with Disabilities than their regional and provincial counterparts, 63% compared to 33% and 17% respectively. While provincially, Newcomers represent over a third of the identified client groups, locally this group represents only 5% of the ES client group.

E S Clients' Employment Destinations by Industry Sector			
	ECOTB Area	Eastern Region	Ontario
Retail Trade	244	1,210	6,617
Accommodation and Food Services	190	942	4,966
Administrative & Support, Waste Management & Remediation Services	185	685	5,141
Manufacturing	176	670	4,751
Construction	158	684	3,073
HealthCare & Social Assistance	108	726	3,958
Other Services	82	408	2,726
Transportation & Warehousing	74	303	1,905
Professional, Scientific and Technical Services	39	283	2,154
Public Administration	32	196	792
Arts, Entertainment and Recreation	31	190	1,052
Education Services	27	280	1,625
Agriculture, Forestry, Fishing & Hunting	25	98	526
Wholesale Trade	25	152	908
Real Estate and Rental & Leasing	15	70	539
Information & Cultural Industries	14	102	798
Finance & Insurance	13	86	750
Mining & Oil & Gas Extraction	5	14	177
Utilities	5	27	131
Management of Companies & Enterprises	0	2	29
Total	**1,448**	**7,128**	**42,618**

Regionally and provincially the majority of Employment Services clients found employment in the retail sector. Regionally this was followed closely by Accommodation and Food Services. However it is encouraging to see the relatively high prevalence of employment in Manufacturing, Construction and Healthcare, since these occupations tend to be more secure and higher paying.

Action Plan Update

Locally there are many forward-thinking activities and initiatives related to business attraction, expansion and retention, entrepreneurism, tourism and social issues. Many agencies work tirelessly to support the development of a skilled local labour force through innovative programs to improve literacy and educational attainment levels. The following represents a brief summary of activities most directly related to labour force development and reflect substantial ECOTB involvement.

The local priority areas focus on the following:

Youth

Recent studies have shown that among the challenges, facing youth are a combination of a lack of knowledge of the realities of the labour force, including employer expectations, the job search process, paired with unrealistic expectations regarding their employment opportunities. There is strong evidence that skills development is more effective if the world of work and the world of learning are linked. Experiential learning provides youth with applied learning opportunities in industry environments and contributes to their job-ready skills, attitudes and behaviours. Post-secondary institutions, such as Loyalist College, play a key role in supporting workplace-based experiential learning. They also provide students with training on industry relevant equipment and technologies. Hands-on learning can also help to motivate disengaged youth to stay in or re-engage with their education, in addition to smoothing the transition from education to work.

Local Youth Priorities:

A recent Ontario Employer skills survey indicates that employers are in the greatest need of post-secondary credentials in the subject areas of science, engineering, and technology; business and financial professions. (Source: The Cost of Ontario's Skills Gap, Conference Board of Canada, June 2013)

- Address issues of a growing gap between the skills that employers state they need and the ones that job seekers can provide.
- Lower educational attainment
- Decreased enrollment in STEM (science, technology, engineering and mathematics) courses
- Encourage youth to consider and explore employment in the technical, skilled trades
- Engage youth in their education, community and the workplace

Actions

- TradeWise event - October 17th, 2013
  - One day event that provides over 70 young women with hands on experience in non-traditional and STEM careers, (automotive, welding, construction, bioscience, manufacturing, culinary, esthetics, electrical), each will complete two projects in disciplines of their choice.
- Trade Places event – May 24th, 2013
  - Over 100 teachers left their classrooms to become students. They met with employers and professionals in a variety of fields and connected what they were teaching in the classroom to the workplace. Then they completed 3 projects in a team completion.
- Careers in HealthCare – October 30th, 2013
  - Approximately 300 grade 9-11 students will be attending a Career fair that will feature over 20 health disciplines. Professional, employers and associations will be on hand with displays and career information.
- Science Engineering Technology Ultimate Pathways (SET-UP) – May 2nd, 2013

- Career Resource development – ongoing
    - Careers in Health handbook
    - Skilled Trades handbook
    - Parent guide to the Skilled Trades
    - Parent guide to careers in hospitality and service sector

Partners - Loyalist College, Algonquin Lakeshore Catholic District School Board, Hasting Prince Edward District School Board, Quinte Healthcare Corporation, local associations and employers

Priority: Accessible Local Labour Market Information

LMI is a valuable resource for individuals who are exploring career, work and learning trends and opportunities, and require information on current and emerging labour market and economic developments. LMI includes a wide range of information related to employment, wages, job qualifications, working conditions, economic indicators, labour market conditions, and occupational forecasts and technology. Users can use LMI (demographic trends, employment projections, etc.) to assist them in planning and developing human resource strategies. Access to LMI is critical to enable individuals, employers, education and training institutions and governments to make informed decisions.

Actions

- Collect, analyze and *share* relevant local data including custom sorts of Canadian Business Patterns, Canada Taxfiler, National Household Survey, Censuses and OMAFRA data with community partners - ongoing
- Prepare an easy-to-read guide for business owners, employers, educators and those planning their careers to access and understand Labour Market Information and its practical applications

Partners - Chambers of Commerce (Napanee, Belleville, Quinte West, Madoc, Prince Edward and Bancroft), economic development offices, Career Edge, Community Employment Services, Prince Edward Learning Centre, Community Learning Alternatives, Vital Signs Advisory Committee,

Priority: Service Coordination

A partnership collaboration of employment services with other health and social service agencies with a focus on providing a more streamlined and consistent approach to client service within the community. Guiding principal objective: *In each community, the assessment and referral process ensures that the client pathway to employment is seamless. Clients can access the right community services and programs, the first time, to address their specific needs.*

Actions

- Managers' Forum – June 18th, 2013
- Quinte Employment Network service coordination Presentation – September 17th, 2013
- Planning Meeting – September 18th, 2013
- Community Service Information Fair – November 7th, 2013
- Service Provider training
    - Prior Learning Assessment and Recognition (PLAR) Practitioner training – November 13th & 14th, 2013
    - Job Development Training Day – November 20th, 2013

Partners - META Employment Services, Community Employment Services, Career Edge, Watton Employment Services, Quinte West Youth Centre, John Howard Society, Military Family Resource Centre, Prince Edward Learning Centre, MTCU, Community Learning Alternatives, Canadian Mental Health Association, Gleaners Food Bank, Volunteer Information Quinte, Kingston Literacy, Highland Shores Children's Aid, Algonquin Lakeshore Catholic and Hastings Prince Edward District School Boards

Priority: Local Food

The agricultural sector is playing an increasing important role in the local Food Processing Industry as `near sourcing` of the food supply chain is becoming increasingly more important in reducing manufacturers` input costs, and meeting increasing consumer demands for local, safe and healthy food.

Actions

- Regional Local Food quarterly meeting – April 26th, 2013
- Local Food Conference – December 3rd, 2013 - Sponsorship and participation

Partners - OMAFRA, Economic Development Offices (Northumberland, Hastings, Lennox & Addington and Prince Edward Counties)

Priority: HR Resource Toolkit for Small Business

The convergence of a number of factors, an aging population, low birth rate coupled with the globalization and technologically progressive economies has resulted in employers facing many challenges in attracting and retaining talent. The new workforce promises to be more diverse in terms of age, gender, ethnicity and lifestyle. Employers will need to offer various work arrangements. Many small businesses lack the resources both human and financial to properly address their HR needs.

Actions

- Develop a plain English Human Resource toolkit for small businesses - ongoing
    - Establish an Advisory Team representing small business
    - Survey small business operators regarding their HR challenges and needs
    - Develop a strategy to address training gaps

Partners - Chambers of Commerce (Belleville, Napanee, Madoc, Bancroft, Quinte West and Prince Edward County), local employers

Priority: Engaging Underrepresented Groups in the Labour Force

In the context of labour force decline, securing the full utilization of the local workforce is becoming increasing important. Increasing the participation of under-represented groups could expand the size of our labour force. Targeting broad demographic groups (such as women, aboriginals, older workers and the disabled) offers great potential for the labour supply, in addition to reducing labour market barriers to improve their social inclusion.

Actions

- Partnership with Rotary at Work Initiative - peer to peer delivery of the business case for hiring persons with disabilities - Event – March 6th, 2013
- Accessibility event – Mental Health in the Workplace – October 4th, 2013

Partners - Local Rotary Clubs, social service agencies, Chambers of Commerce, Community Living Belleville and Area, META Employment Services, City of Belleville, John Howard Society, Community Learning Alternatives, Prince Edward Learning Centre

Emerging Trends

A Reformation of the Post-Secondary Education (PSE) System

Colleges and universities will continue to play a key role in developing a skilled and adaptive labour force for an increasingly complex and competitive workplace. However, they must ensure that their program offerings remain relevant to labour market demand. Experts predict that over the next few years the proportion of jobs requiring some form of post-secondary education will increase to over seventy-five percent. However, a one size fits all approach to education excludes many members of the population. Conventional PSEs cater to 18-24 year olds pursing a traditional degree or diploma on a full time basis. However, many of today's learners will require a greater range of options and innovative programs to accommodate their work and familial obligations. Traditional models of education must be adapted to meet the evolving needs of today's labour market

Significant PSE innovations and trends will include:

- changes in some programs from four year to three-year degrees
- greater use of "technology-enabled" learning
- simpler mechanisms for transferring course credits between college and university
- expanded online and night courses/programs that focus on more analytical and social intelligence programs, such as sciences and engineering
- programs and policies that target speedy labour market integration upon graduation – such as graduate guarantee programs, supports for entrepreneurs, paid internships, and income supports
- provision of courses for first year students that outline what their career path will look like
- additional courses in the practical aspects of job search, such as cover letter writing, etc.
- programs for entrepreneurship – developing a new focus on graduating *job creators* not just *job seekers*

Career Planning - the new education focus

The issue of youth unemployment and underemployment may be rooted in an inadequate match between employers' needs and workers' skills. Greater use of school/PSE-employer partnerships will help to improve the match between employers' needs and workers' skills as well as to help youth make informed decisions about their field of study. A constructive, needs and ability based approach of career advisors, educators and parents in guiding youth in their career choices will be instrumental in ensuring that the level of skills present in the economy is adequate.

Healthy Job Growth in Primary Industries

The fortunes of primary industries are on the rise and so is the demand for skilled labour. The Canadian mining industry predicts $140 billion in new mining investment in the next five years. Last year, Canada's agricultural sector experienced the largest harvest on record, worth an estimated $53 billion, up seven percent from 2011. This growth is expected to continue as demand in emerging markets rises.

The resource industries have long been important to the economy. Provincially 153,000 work in forestry, 235,000 in mining and 2.1 million in agriculture and food. While ECOTB has been tracking the local agriculture / agri-food sectors for some time, two other areas are showing promise.

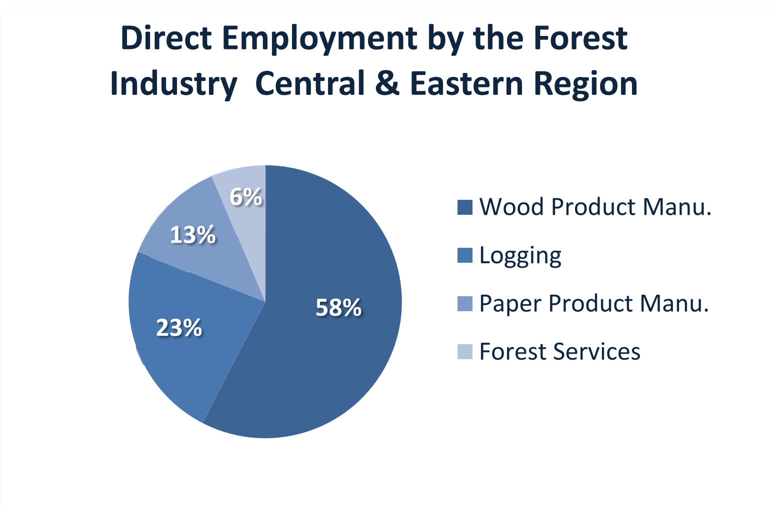
Positive Signs for the Forest Industry

There are clear signs of recovery in the Forestry and Forest Product Sectors with improvement in the US housing market (65% of exports), a sustained domestic demand, and lumber and pulp prices trending steadily upward.

> *'By 2020 the industry will generate an additional $20 billion in economic activity from new innovations and growing markets."*
> *Forest Products Association of Canada*

Signs of Growth

- *Aditya Birla (Birla) has spent over $250 million to convert Terrace Bay into a dissolving pulp mill supporting a total of 1,900 jobs.*
- *Olav Haavaldsrud Timber Company is nearing completion of a $66 million co-generation facility adjacent to its sawmill. The facility will use biomass waste to produce electricity for sale to the*
- *Resolute Forest Products has announced it will invest $50 million to build a new sawmill in Atikokan. The mill is expected to employ 90 people when it becomes fully operational in 2014.*
- *EACOM is expanding its Timmins sawmill, at a cost of $25 million. The company expects to bring back all employees displaced by the shutdown. It is expected to reopen by the fall of 2013.* *(Source: Ministry of Natural Resources presentation September 25th, 2013)*



Source: Healthy Forests, Healthy Business - Ontario Ministry of Natural Resources

The Canadian Forest Products Sector estimates that by 2020 approximately one third or 53,000 forestry workers will retire, and based upon projected growth scenarios, logging operations, mills and wood-product manufacturers expect to hire between 40,000 and 120,000 workers in the same period. Half of the growth is expected to come from new export markets while the other half will result from new products.

The forestry sector can be effectively divided into three sub-groups:

1. **Primary**
   a. Harvesting
   b. Forestry and Nurseries Services
2. **Commodity**
   a. Lumber Residuals
   b. Pulp
   c. Newsprint
3. **Value-added**
   a. Wood products
   b. Papers

As a result, this sector employs a wide spectrum of workers, from cutters and skidders who harvest the trees to chemical engineers who develop the new products. In general, our northern region is dominated by *Primary* and *Commodity*, while the southern region tends to employ predominately *Value-added* workers. This represents many employment and career opportunities regionally and provincially. The Forest Products Association of Canada's focus is on rebranding the industry (Vision2020 and *The Greenest Workforce*) to attract a new generation of workers, and gaining Government support.

The Fur Trade *'Renaissance'*

In 2012, Canadian fur exports topping $706 million, a 33% increase from 2011 and more than double the exports of 2000. According to the Fur Council of Canada, year over year prices for individual pelts are up 30% on average. Experts predict this trend to continue as China's growing middle class has a taste for luxury goods including Canadian fur. Similar markets are emerging in South Korea and Russia. Trapping is seasonal work, hard work and out in the elements. However this lifestyle and self-employment opportunity is appealing to more and more remote populations. In Ontario, there are currently 8,700 licenced trappers, the highest number since the mid 1990's. In response, the Ministry of Natural Resources has a new youth fur trapping program to extend trapping licences to youth. Their goal is to educate and encourage youth to consider trapping as a viable career.

> *"The market is very strong…It is good news for the people on the land in Canada"*
> *Alan Herscovici, Executive Vice-president, Fur Council of Canada*

While both the Forestry and the Fur Sectors have their opponents, they represent an important part of our heritage and economic development, and now, perhaps future employment opportunities.

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This Employment Ontario project is funded by the Ontario government

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