October 2013

AWiC ALGOMA WORKFORCE INVESTMENT CORPORATION

Local Labour Market Plan Update

EXECUTIVE SUMMARY

The primary role of the Algoma Workforce Investment Corporation (AWiC) is to provide current labour market data to community stakeholders and to the public so that issues regarding Algoma's workforce can be identified and ultimately addressed. In March 2013, AWiC released the *2013 Local Labour Market Planning Report* which provided a comprehensive overview of Algoma's labour market as a whole and the local labour markets within the District. This report is an update to that report and includes the latest Labour Market information contained in the 2011 National Household Survey.

In addition the Ministry of Training, Colleges and Universities (MTCU) has provided AWiC with aggregated Employment Ontario (EO) program data for the District of Algoma. This data focuses on the Employment Services (ES), Literacy and Basic Skills (LBS), Second Career (SC) and Apprenticeship programs. The data provides insight into the number of clients served within Algoma and allows us compare these at a regional and provincial level. It also allows a comparison of the Employment Ontario data to Labour Market data to provide insight into any issues such as any gaps, overlaps and under-serve populations in local services.

As part of the process of writing this report AWIC consulted with Employment Service Providers and Literacy & Basic Skills providers across Algoma to verify the data and provide input on the results. The feedback from these consultations has been incorporated into the final report.

And finally a note about the data – in order to put the National Household Survey data into some sort of context we often compare it to the previous survey information from 2006. Readers should note that Statistics Canada states: "Caution must be exercised when NHS estimates are compared with estimates produced from the 2006 Census long form, especially when the analysis involves small geographies. Users are asked to use the NHS's main quality indicator, the global non-response rate, in assessing the quality of the NHS estimates and determining the extent to which the estimates can be compared with the estimates from the 2006 Census long form." AWiC attempts to make observations based on close approximations of all available data. The information in this report should be used as part of an analysis from other sources and in collaborating with other like-minded organizations. For further information, see the Comparability of the NHS Estimates on the Statistics Canada website.

If you have any questions about the data is this report or Labour Market issues in general, please feel free to contact AWiC. Also visit www.awic.ca for the latest labour market information for the District of Algoma.

Thank you,

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LOCAL LABOUR MARKET CONDITIONS

POPULATION

An aging population, low birth rates and a declining overall population are indicators pointing to labour challenges for Algoma as more people retire and there are less people entering the workforce. The following table provides an overview of the change in population across Algoma. In general the overall population is declining and only two areas are experiencing slight growth.

TABLE 1

Comparison of 2006-2011 Census Population of Communities in Algoma

Geography	Population 2011	Population 2006	% Change
Algoma	115,870	117,461	-1.4%

Source: Statistics Canada, 2011 Census of Population

At the same time we are seeing a decrease in overall population the overall age of the population is increasing. The factors contributing to this trend are a decrease in the birth rates and an out-migration of youth. Table 2 shows the Median age of Algoma compared to the rest of the province and country while Table 3 shows the migration of people by age range.

TABLE 2

Median Age of Algoma Compared to Ontario & Canada

	Median Age	
	2006	**2011**
Canada	39.5	40.6
Ontario	39.0	40.4
Algoma	**45.0**	**47.2**

Source: Statistics Canada, 2011 Census of Population

Population Trends

- Algoma is 'aging' quicker than the rest of Ontario and Canada.
- As older people leave the workforce, effective succession planning is needed to transfer skills to younger workers.
- A decrease in population means a decrease in overall labour force which could slow the growth of the economy and individual sectors (for example Forestry and Mining in Superior East).
- Net out migration of youth could reflect a perceived lack of career opportunities in Algoma or skills mismatch between the youth that are leaving the area and needs of local employers.
- Immigration and tapping into under-utilized pools of labour (such as First Nations and Women in non-traditional roles) could help the immediate need and bridge the gap for developing local workforce.

TABLE 3

Net-Migration for Algoma by Age Group 2006-2011

Age Group	In-migrants	Out-migrants	Net-migrants
0-17	3,114	2,766	348
18-24	1,671	2,831	-1,160
25-44	4,700	5,229	-529
45-64	3,179	2,607	572
65+	1,296	1,677	-381
Total	**13,960**	**15,110**	**-1,150**

Source: Statistics Canada, Taxfiler

For more detailed information on **Algoma's Population Trends** please read:

AWIC's March 2013 LLMP Report

LABOUR FORCE CHARACTERISTICS AND TRENDS

Labour Force Survey (LFS) information provides a picture of labour force participation, employment and unemployment for the population aged 15 and over.

In Table 4 Algoma's participation and employment rates remained fairly consistent between census years, but the unemployment rate increased by 2.1%.

TABLE 4

Labour Force Percent Change in Algoma, 2006 - 2011

	2006	2011	% Change
Participation Rate (%)	57.2	56.8	-0.4
Employment Rate (%)	52.1	50.6	-1.5
Unemployment Rate (%)	8.9	11	2.1

Source: 2011 National Household Survey

Unfortunately detailed Labour Force information is only provided on a regular basis for Sault Ste. Marie, but we can use these numbers to reflect trends that should be consistent across the region. The following table shows the annual Labour Forces rates for the past 3 years.

TABLE 5

Sault Ste. Marie Year Labour Force Estimates
2010-2012

Labour force characteristics	2010	2011	% change from 2011-2010	2012	% change from 2012-2011
Unemployment rate (rate)	10	8.9	**-1.1**	7.5	**-1.4**
Participation rate (rate)	60.9	58.2	**-2.7**	53.9	**-4.3**
Employment rate (rate)	54.8	53.2	**-1.6**	49.9	**-3.3**

Source: Labour Force Survey, Statistics Canada

For 2012, Table 5 indicates Sault Ste. Marie unemployment rate (year over year) was the lowest it has been since 2010. The unemployment rate dropped 1.4% between 2012 and 2011. While there was a 3.3 % decline in the number of people employed, labour force participation dropped by 4.3% suggesting that some people may have stopped looking for work or chosen retirement.

We can also look at current data from the Monthly Labour Force Survey for Sault Ste. Marie. While the year over year trends show decreases in Labour Force estimates, the monthly data shows that each of metrics is increasing. For example unemployment has increased to 8.5%.

TABLE 6

Sault Ste. Marie Monthly Labour Force Estimates
July 2011-2013

Labour force characteristics	2011	2012	change from 2011-2010	2013	change from 2012-2011
Unemployment rate (rate)	9.9	6.5	**-3.4**	8.5	**2.0**
Participation rate (rate)	63	55.5	**-7.5**	58.7	**3.2**
Employment rate (rate)	56.9	51.7	**-5.2**	53.7	**2**

Source: Labour Force Survey, Statistics Canada

Perhaps more of a concern here though is the participation and employment rates which are based on the numbers of people actually working and looking for work as a percentage of the total population 15 years and over. These rates are significantly lower than the Ontario rates for the same timeframe 67.5% and 62.3% respectively. This means that proportionately, significantly more people have left the workforce in Algoma compared to Ontario and less people are employed as a portion of the total population (for example in Sault Ste. Marie only about 1 in 2 people are employed – 53.7%).

Unemployment rates also vary by age range. Table 7 shows that unemployment is significantly higher for those looking for work between the ages of 15 to 19 years old than any other age range. This is concerning as it indicates a lack of opportunities for the youngest members of the workforce which contributes to youth out-migration as people look elsewhere for opportunities.

TABLE 7

Labour Force Statistics by Age Range

	Participation rate	Employment rate	Unemployment rate
Total - Age groups	56.8	50.6	11
15 to 19 years	47.3	33.6	29.1
20 to 24 years	80.8	59.8	25.9
25 to 44 years	83.1	74.8	10
45 to 64 years	66.2	62.1	6.2
65 years and over	9.7	8.7	10.1

Source: 2011 National Household Survey

Labour Force Trends

- Unemployment increased between census years while Participation and Employment rates decreased.
- Decline in Participation and Employment rates indicates that a significant number of people have stopped looking for work or have retired – which is a reflection of Algoma's aging workforce.
- Although the unemployment rate is not much higher than the provincial rate, we can assume that if Algoma had a higher participation rate (ie. more people actively looking for work) there would be a higher unemployment rate.
- Unemployment is highest among youth aged 15 to 24 years of age.
- Males in Algoma experience a higher unemployment rate than females.

EDUCATIONAL ATTAINMENT

The over-all levels of education required to perform any given occupation has increased steadily over the years. Jobs that may have only required a high-school education in the past may now require at least 2 years of college now. Even entry level jobs in the Retail or Service sector require that people have a certain level of Essential Skills (Literacy and Numeracy) in order to perform the job effectively. As reflected in Table 8, completing High School is essential for access to the labour market and having completed some form of post-secondary education increases an individual's employability significantly.

Labour Force Statistics by Level of Education

Highest Level of Education	Unemployment Rate	Participation Rate	Employment Rate
Total – Total Unemployment (at time of 2011 Census)	11%	56.8%	50.6%
No certificate, diploma or degree	19.8%	29.6%	23.7%
High school diploma or equivalent	13.8%	59.2%	51%
Postsecondary certificate, diploma or degree	7.9%	67.5%	62.2%
Apprenticeship or Trades Certificate or Diploma	9.5%	57.5%	51.9%
College, CEGEP or other non-university certificate or diploma	8.3%	70.5%	64.7%
University certificate or diploma below bachelor level	7.6%	64.7%	59.8%
University certificate, diploma or degree at bachelor level or above	6.4%	71.5%	67%

Source: 2011 National Household Survey

With that in mind we can compare the levels of Educational Attainment for Algoma between census years and we see that the levels of education have increased slightly across the board. However 50% of the population still has just a High School certificate or less.

TABLE 9

Level of Educational Attainment

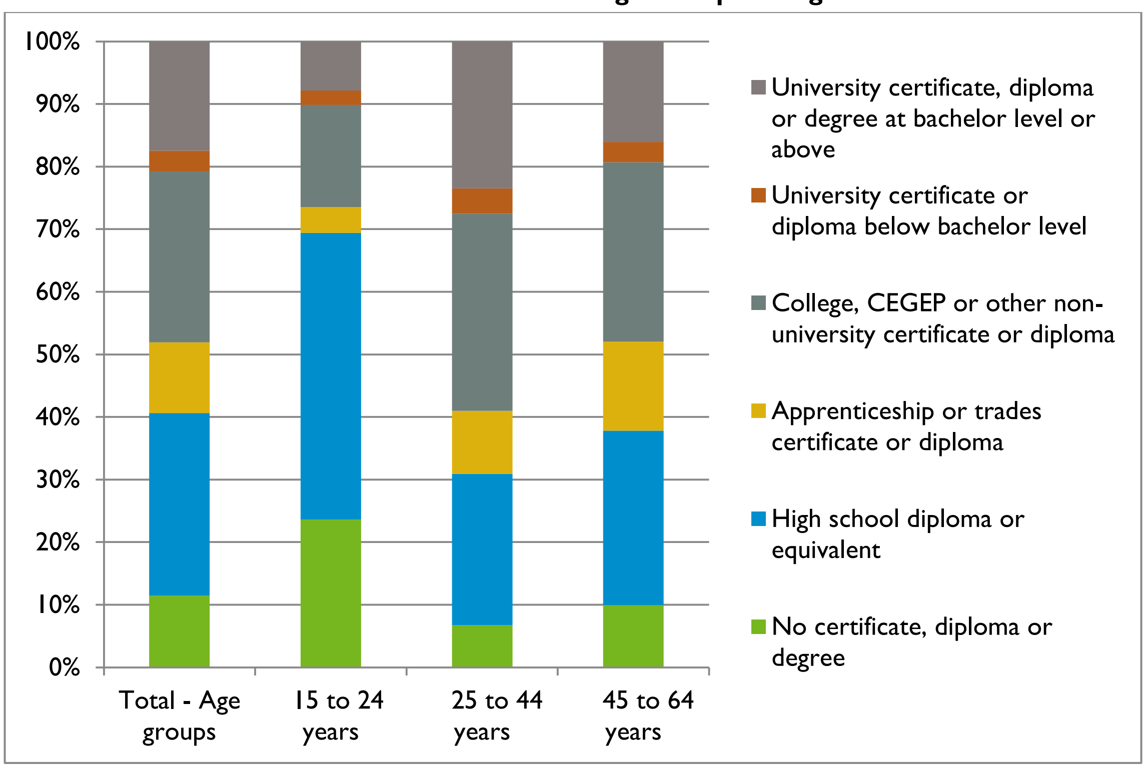
	2006	2011
No certificate; diploma or degree	*28%*	*22.0%*
High school certificate or equivalent	27%	28.0%
Apprenticeship or trades certificate or diploma	11%	11.2%
College; CEGEP or other non-university certificate or diploma	20%	22.0%
University certificate or diploma below the bachelor level	3%	2.9%
University certificate; diploma or degree	12%	13.9%

Source: 2011 National Household Survey

Looking at the Level of Education across age ranges in Table 10, we can see that the youngest age range has the least amount of education. Almost 70% has a High School diploma or less. Obviously a lot of these people are still in school and this high number is a reflection of that fact – but if we consider the unemployment rates for this age group, we know that significant portion of this age range are actively looking for work without success.

TABLE 10

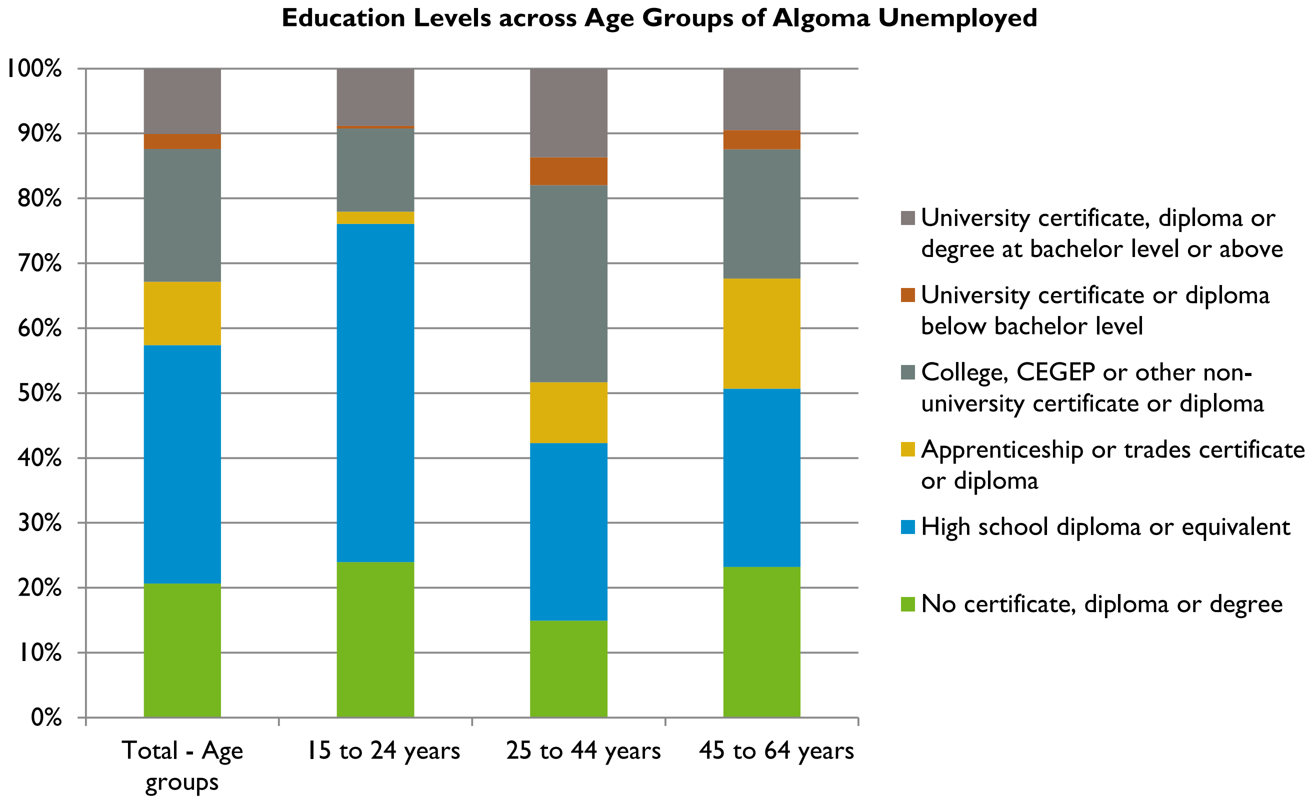
Level of Education across Age Groups in Algoma



Source: 2011, National Household Survey

Breaking the data down further, Table 11 shows the Level of Education of those that are unemployed in Algoma by Age Range. It also highlights the lower education rates of the younger demographic and the fact that those with a High School degree or less make up the majority of the unemployed in that age range.

TABLE 11



Source: 2011, National Household Survey

Educational Attainment Trends

- Highest unemployment for those without high school.
- Unemployment rates decrease with higher levels of education.
- Almost 70% of those aged 15 to 24 have only a high school diploma or less.
- Skilled based economy means a for need more education and training qualifications
- Of those with post-secondary training or education, Apprentices have the highest level of unemployment. This reflects the some of the employment issues Apprentices find in getting a job such as employer reluctance to hire apprentices and ratios.

OCCUPATION CHARACTERISTICS

Overall, there has been shrinkage of 3.8% in employment among Algoma industries between 2006 and 2011, representing 1,970 fewer jobs. Like elsewhere in the province, Manufacturing led the decline, with 1090 jobs lost, a drop of 16.9%, largely in wood product manufacturing (minus 820 jobs) and paper manufacturing (minus 305 jobs).

Other sizeable jobs losses were experienced in:

- Other Services (minus 765 jobs, down 25.6%), almost entirely in automotive repair and maintenance (minus 655 jobs);
- Administrative and Support (minus 675 jobs, down 21.1%), due to a sharp decline in business support services (minus 910 jobs) – this subsector includes call centres; there were increases in some other subsectors, such as investigation and security services (plus 85 jobs);
- Transportation and Warehousing (minus 565 jobs, down -22.4%), due to losses in truck transportation (minus 250 jobs) and transit and ground passenger transportation (minus 245 jobs) (this includes school bus services);
- Accommodation and Food Services (minus 500 jobs, down 12.8%), all due to traveller accommodations (minus 490 jobs).

TABLE 12

Employment by Industry; Comparisons between 2006 and 2011

Algoma

	Number	% Change	% Distribution	
	2011	**06-11**	**2006**	**2011**
ALL INDUSTRIES	49,420	-3.8%	100.0%	100.0%
Agriculture, forestry, fishing, farming	650	-44.2%	2.3%	1.3%
Mining and oil and gas extraction	790	90.4%	0.8%	1.6%
Utilities	510	47.8%	0.7%	1.0%
Construction	3,225	19.2%	5.3%	6.5%
Manufacturing	5,360	-16.9%	12.6%	10.8%
Wholesale trade	940	6.8%	1.7%	1.9%
Retail trade	6,160	-4.2%	12.5%	12.5%
Transportation and warehousing	1,955	-22.4%	4.9%	4.0%
Information and cultural industries	545	-28.3%	1.5%	1.1%
Finance and insurance	1,220	17.3%	2.0%	2.5%
Real estate and rental and leasing	660	-18.0%	1.6%	1.3%
Professional, scientific, technical	1,780	6.9%	3.2%	3.6%
Management of companies	15	-50.0%	0.1%	0.0%
Administrative and support	2,525	-21.1%	6.2%	5.1%
Educational services	4,100	1.7%	7.8%	8.3%
Health care and social assistance	7,330	9.3%	13.0%	14.8%
Arts, entertainment and recreation	1,465	-7.6%	3.1%	3.0%
Accommodation and food services	3,415	-12.8%	7.6%	6.9%
Other services	2,225	-25.6%	5.8%	4.5%
Public administration	4,555	22.0%	7.3%	9.2%

Source: 2011, National Household Survey

On the other hand, there were industries exhibiting growth, in particular:

- Public Administration (plus 820 jobs, up 22.0%), with growth at all three levels: federal government (175 jobs), provincial government (405 jobs) and regional and local government (280 jobs);
- Health Care and Social Assistance (plus 625 jobs, up 9.3%), the major advances being in nursing homes and residential care facilities (370 jobs), offices of health practitioners other than physicians and dentists (180 jobs) and dentists' offices (140 jobs);
- Construction (plus 520 jobs, up 19.2%), almost all the increase occurring among the specialty trades;
- Mining and Oil & Gas Extraction (plus 375 jobs, up 90.4%), all in mining

These changes have re-ordered, somewhat, the industries by proportion of employment. Health Care and Social Assistance remains in first place in terms of total employment, now accounting for 14.8% of all employed Algoma residents. Retail Trade has moved from third to second, even though it lost jobs, only because manufacturing lost even more, dropping from second to third spot. Public Administration's large growth vaulted it from sixth to forth position. Educational Services grew, but nonetheless was displaced from fourth to fifth spot. And Accommodation and Food Services fell from fifth to sixth.

EMPLOYER CHARACTERISTICS AND TRENDS

Table 13 provides the number of employers present in the District of Algoma in June 2013, and breaks down the figures by industry and by employee size ranges. The highlighted cells identity the three industries with the largest number of firms for each employee size category column.

A few observations to highlight from the data on number of employers:

- *Number of small firms*: Businesses are by far made up of small establishments. 43% of the firms in Algoma have no employees,[1] a proportion notably smaller than the percentage for Ontario as a whole (57%, see the last row). 26% of employers have 1-4 employees, and 83% have less than 10 employees;

- *Highest number of firms by industry*: The second to last column provides the percentage distribution of all firms by industry. Retail Trade is the largest industry by number of employers in Algoma, accounting for 13.4% of the total, considerably higher than the provincial average of 9.0%; Construction comes second with 11.0%, the same as the provincial average of 11.2%. Real Estate and Rental & Leasing; Other Services;[2] and Health Care & Social Assistance round out the top five;

- *Highest number of firms by size and industry*: The three largest industries by each employee size category have also been highlighted. The table demonstrates how the large number of firms in the no employee category drives the total numbers, in Construction; Real Estate and Rental & Leasing; and Professional, Scientific & Technical Services. Establishments with 1-4 employees are prominent in Health Care & Social Assistance and Other Services, while in the mid-size and large ranges, various industries claim the top three spots.

TABLE 13

Number of Employers by Employee Size
June 2013 – Algoma

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYERS									
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL	%	RANK
11 Agriculture	169	68	18	6	5	1	0	267	5	9
21 Mining	10	5	1	2	0	1	3	22	0	20
22 Utilities	10	2	4	2	3	0	3	24	0	19
23 Construction	250	181	84	48	28	10	4	605	11	2
31-33 Manufacturing	56	30	23	15	11	12	5	152	3	12
41 Wholesale Trade	47	33	36	20	12	3	0	151	3	13
44-45 Retail Trade	176	186	189	118	41	13	12	735	13	1
48-49 Transportation/Warehousing	143	48	19	25	12	5	5	257	5	10
51 Information and Cultural	19	12	7	4	6	0	0	48	1	17
52 Finance and Insurance	159	54	28	11	41	1	1	295	5	8
53 Real Estate	420	93	25	13	6	2	0	559	10	3
54 Professional Scientific Tech	223	117	45	20	14	3	1	423	8	6
55 Management of Companies	116	12	6	2	1	0	0	137	3	14
56 Administrative Support	60	55	28	14	12	5	6	180	3	11
61 Educational Services	19	12	8	5	2	1	4	51	1	16
62Health Care & Social Assist	105	194	60	63	24	7	16	469	9	5
71 Arts, Entertainment & Rec	45	22	16	15	9	0	2	109	2	15
72 Accommodation & Food	122	77	72	75	55	9	3	413	8	7
81 Other Services	198	235	76	26	11	3	2	551	10	4
91 Public Administration	3	3	6	9	9	4	5	39	1	18
TOTAL	**2350**	**1439**	**751**	**493**	**302**	**80**	**72**	**5487**		
Percentage of all employers	43%	26%	14%	9%	6%	1%	1%	100%		
Cumulative percentage	43%	69%	83%	92%	97%	99%	100%			
ONTARIO percentage of all employers	57%	24%	8%	5%	4%	1%	1%			

Source: Statistics Canada, Canadian Business Patterns

[1] This actually undercounts the number of self-employed individuals. The Statistics Canada's Canadian Business Patterns database does not include unincorporated businesses that are owner-operated (have no payroll employees) and that earn less than $30,000 in a given year.
[2] This industry is made up of: repair and maintenance establishments; personal and laundry services; religious, grant-making, civic, and professional and similar organizations; and private households employing staff (a negligible subsector in Algoma).

Change in the number of employers by size of firm

One indicator of the local economic activity and employment trends is the number of employers, including the size of their firms, present in the local community. Table 6 provides the numbers of employers aggregated by several size categories for the District of Algoma over the course of several years:

"0"	Zero employees (in most instances, self-employed employers, or no employees)
1-19	Small firms
20-99	Medium-sized firms
100+	Large firms

TABLE 14
ALGOMA
NUMBER OF FIRMS BY EMPLOYEE SIZE
DECEMBER 2008 TO JUNE 2013

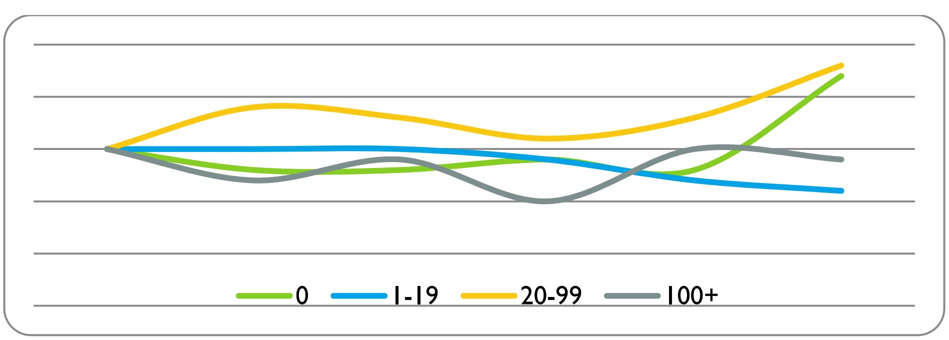
	0	1-19	20-99	100+
December 2008	2,190	2,788	354	73
June 2009	2,140	2,776	368	71
December 2010	2,157	2,777	363	72
June 2011	2,160	2,751	357	69
June 2012	2,141	2,714	364	73
June 2013	2,350	2,683	382	72

Source: Canadian Business Patterns - Statistics Canada

Table 15 makes evident the trends in the changing number of employers by employee size. The chart uses the figures for December 2008 as the baseline, assigning a value of 100. Each subsequent number is expressed in relation to the December 2008. This makes it easier to visualize changes across numbers with different orders of magnitude for these categories.

In the three years after the start of the 2008 recession, there was a general downward trend in the number of firms in the different size categories (apart from an initial increase in the number of firms with 20-99 employees). Since 2011, there has been a recovery in the number of firms with 100 or more employees, and growth among firms with no employees and 20-99 employees. Firms with 1-19 employees, however, have continued to decrease in numbers. The industries with large numbers of establishments in this category are: Construction; Retail Trade; Health Care & Social Assistance; and Other Services.

TABLE 15
Change in the number of employers by size of firm
December 2008 to June 2013, (December 2008 = 100)
Algoma



Source: Canadian Business Patterns - Statistics Canada

Change in the number of firms by industry, June 2012 to June 2013

Changes in the number of employers are experienced differently across the various industries. Table 16 highlights the change in the number of firms by industry and by employee size between June 2012 and June 2013 for Algoma. The tables also list the total number of firms in each industry in June 2013, to provide a context.

The colour-coding of the table (green where there is an increase, red where there is a decrease) helps to illustrate any pattern. Note that these changes not only represent the emergence of new firms or the shutting down of firms; an establishment can change categories, adding or losing sufficient workers to push them from one size category to another.

TABLE 16

ALGOMA
CHANGE IN THE NUMBER OF EMPLOYERS,
BY INDUSTRY AND BY FIRM SIZE, JUNE 2012 TO JUNE 2013

INDUSTRY	Firm size (number of employees)					Total number of firms June-13
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing and farming	11	5	1	0	17	267
Mining and oil and gas extraction	4	3	-1	0	6	22
Utilities	4	1	1	0	6	24
Construction	15	7	-3	1	20	605
Manufacturing	3	-6	2	0	-1	152
Wholesale trade	-7	-8	-2	0	-17	151
Retail trade	13	-3	-6	1	5	735
Transportation and warehousing	18	-12	4	-1	9	257
Information and cultural industries	0	3	0	0	3	48
Finance and insurance	11	7	2	-1	19	295
Real estate and rental and leasing	49	16	1	0	66	559
Professional, scientific and technical services	14	-7	4	1	12	423
Management of companies and enterprises	-1	1	-1	0	-1	137
Administrative and support	-3	-11	3	0	-11	180
Educational services	5	-5	0	-1	-1	51
Health care and social assistance	36	27	1	0	64	469
Arts, entertainment and recreation	1	-1	-2	-1	-3	109
Accommodation and food services	12	-21	7	0	-2	413
Other services	24	-24	4	0	4	551
Public administration	0	-3	3	0	0	39
TOTAL	**209**	**-31**	**18**	**-1**	**195**	**5487**

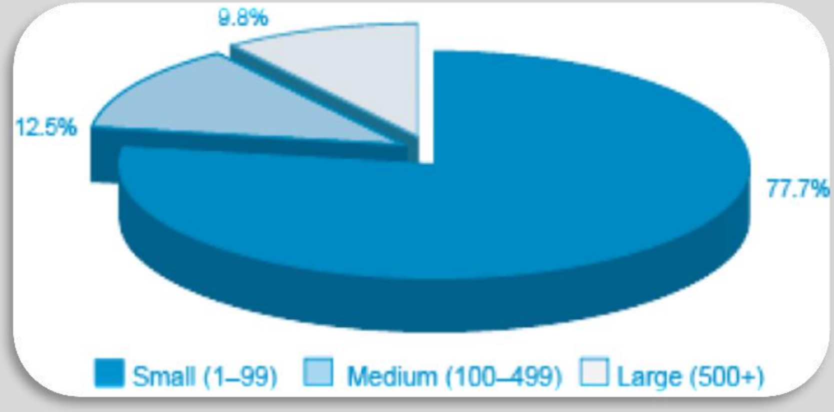
Statistics Canada, Canadian Business Patterns, June 2012 and June 2013

When changes in the number of employers between June 2012 and June 2013 are broken down by industry and by size of establishment, a more nuanced view emerges. Several industries show a consistent pattern across most size categories. Thus, growth in the number of employers is clear in: Agriculture, Forestry, Fishing and Farming; Utilities; Real Estate and Rental & Leasing; and Health Care & Social Assistance. On the other hand, decreases predominate in: Wholesale Trade; Retail Trade (despite the additional store with 100+ employees); and Arts, Entertainment & Recreation.

Overall, however, the net decline by one in the number of firms with 100+ employers is more than compensated by the net increase by 18 in the number of firms with 20-99 employees.

The power of Small Businesses

The industry and occupation data for Algoma show the importance of Small and Medium Sized Enterprises (SMEs) to in the local economy and in job creation.



This same pattern can be found nationally as well. Small businesses account for more than 98 percent of all firms in Canada and proportionally play a large role in net job creation, creating 77.7 percent of all private jobs from 2002 to 2012.

In total, Canadian small businesses created a little over 100,000 jobs each year on average.

Medium-sized and large businesses, which account for 1.6 percent and 0.1 percent of all firms, respectively, created 12.5 percent and 9.8 percent of net new jobs over the same period, representing about 17,000 and 118,000 jobs each year on average.

Source: Statistics Canada, *Labour Force Survey* (LFS), 2012, and calculations by Industry Canada.

EMPLOYMENT ONTARIO (EO) CLIENT DATA

This year, 2013, the Ministry of Training, Colleges and Universities (MTCU) provided AWiC with aggregated Employment Ontario (EO) program data for the District of Algoma. This data provides insight into the number of clients served within Algoma and allows us compare these at a regional and provincial level. It also allows a comparison of the Employment Ontario data to Labour Market data to provide insight into any issues such gaps, overlaps and under-serve populations in local services.

The Employment Ontario data focused on the Employment Services (ES), Literacy and Basic Skills (LBS), Second Career (SC) and Apprenticeship programs.

UNEMPLOYMENT

By using the unemployment rate we can approximate the number of people who were unemployed and compare that to the number of people who used Employment Services.

TABLE 17

ES Clients by Percent of all ES Clients; Compared to Total Population

	Algoma	Northern	Ontario
ES Clients	78%	61%	32%

Source: Employment Ontario, Local Board Report, Algoma 13

Unemployed figures from Labour Force Survey, 2012; Northern Region is based on sum of Northeast and Northwest Economic Regions figures; Board estimate of unemployed relies exclusively on Sault Ste. Marie Census Agglomeration data (while Sault Ste. Marie population accounts for almost 70% of the Board area's population, it does not necessarily account for the same proportion of the area's unemployed. As a result, this cell is shaded pink, to signify caution).

The comparison of ES clients as a percentage of all unemployed is a rough calculation, as the ES Client figures cover the fiscal year (April 1, 2012 to March 31, 2013) while the figure for the unemployed covers the calendar year (January 1 to December 31, 2012). Nevertheless, it provides a useful approximate comparison. In the case of the Northern Region, it appears that ES clients make up a significant proportion of the unemployed, almost double the proportion experienced in the province as a whole (61% compared to 32%). In the case of the Board area, given that the estimate for the number of unemployed undercounts the true number; one can still infer that ES clients very likely make up a larger share of the unemployed than the provincial average.

In short, ES service providers in Algoma appear to be doing a better job of reaching more of the unemployed than the provincial average.

AGE COHORTS

The majority of the clients who utilized employment services were in the 25-44 age groups at 1,017 or 46.7% of the total clients. Ontario's employment service clients were slightly higher at 47.5% of the clients were in the same age category.

Table 18 compare the proportions of ES clients by age range for the three geographies.

TABLE 18

Distribution by Age of ES clients and Unemployed
Algoma, Northern Ontario and Ontario

	ES CLIENTS			ALL UNEMPLOYED		
Age range	**Algoma**	**Region**	**Ontario**	**Algoma**	**Region**	**Ontario**
15-24 years	26.8%	30.9%	21.1%	39.0%	37.7%	31.7%
25-44 years	46.7%	45.1%	47.5%	32.3%	N/A	37.0%
45-64 years	25.9%	23.5%	30.6%	25.1%	N/A	29.4%
over 65 years	0.6%	0.5%	0.8%	3.6%	N/A	1.8%

Source: Employment Ontario, Local Board Report, Algoma 13. 2011 National Household Survey, Statistics Canada.

The figures for the unemployed in Ontario are from the Labour Force Survey for Ontario, 2012, StatCan CANSIM Table 282-0002; figures for the unemployed for the Region are from Greater Sudbury CMA figures, which only represents 21% of the Region's population, and so need to be treated with caution. Data at the board level is from the 2011 National Household Survey data.

This distribution suggests that youth make up a much smaller share of the ES client base than their share of all unemployed, and conversely 25-44 year olds make up a much larger share of the ES client population, compared to their share of all unemployed.

Some concerns raised during consultation included that there might be 'branding' issues with youth that ES is seen as only for people who have lost their job or have a barrier to employment. Therefore there is an opportunity to promote the services more to youth – including those with post-secondary education who are looking for their first jobs after graduation. Also raised, was the fact that there may be some apathy among this age group in finding a job – they simply are not as concerned as older age groups.

Although just released at the time of this report, youth initiatives such as the Youth Employment Fund (YEF) will increase the number of youth who are aware of ES and ultimately take advantage of the programs.

GENDER

Based on 2011 National Household Survey employment numbers, those employed is split 50/50 by gender, but males have a significantly higher unemployment rate – 59% compared to 41%.

On the surface the higher number of unemployed males would explain why more males access Employment Services. But if we compare the percentage total unemployed by gender against the percentage of ES clients by gender we see that, at least a district level, unemployed females are more likely to access the services (some individual ES offices noted that they actually have more male clients than female).

TABLE 19

Distribution by Gender of Unemployed and ES clients
Algoma, Region and Ontario

ONTARIO	
Unemployed	
55.2%	**44.8%**
ES Clients	
50.8%	**49.2%**
REGION	
Unemployed – Sudbury CMA, Thunder Bay CMA	
56.3%	**43.8%**
ES Clients	
57.9%	**42.1%**
ALGOMA	
Unemployed – Algoma	
58.5%	**41.2%**
ES Clients	
54.5%	**45.5%**

Source: Employment Ontario, Local Board Report, Algoma 13

The calculation for the unemployed in Ontario is derived from the Labour Force Survey for Ontario, 2012, StatCan CANSIM 282-0004. The calculation for the unemployed in the Northern Region is an estimate derived from the Labour Force Survey for the Greater Sudbury and Thunder Bay CMAs. The calculation for the unemployed in the Algoma Workforce Investment Corporation area is derived from the 2011 National household Survey. ES client data is 2012-13. Unemployed data is 2012. Blue bars represent males, pink bars represent females.

In Algoma, males are less likely to access EO services even though they may need more assistance.

- When you compare the number of males and females accessing Literacy and Basic Skills programs the gap grows even wider. Only 37% of the participants are male compared to 63% female.
- Perhaps this is partial explained by a stigma associated with literacy issues by males and could be addressed with having more male instructors to work with male clients and a focus on promoting programs as workplace essential skills.

EDUCATIONAL ATTAINMENT

Comparing the ES client numbers to unemployed numbers, it would appear that unemployed individuals with less than a high school diploma are less likely to use ES services (they make up 20.7% of the unemployed while only 15.1% of ES clients), while College graduates are more likely to use the services (20.5% of unemployed yet 30% of ES clients). Individuals with either high school diplomas or university degrees are slightly more likely to use ES services.

The one major variance from the figures for the Northern Region is that Algoma appears to have a considerably smaller proportion of ES clients with "no certificate" – 15.1% compared to 25.3% for the Region. Otherwise, the Algoma area has a slightly higher percentage of ES clients with either college or university completion.

TABLE 20

Educational attainment levels among 2012 ES clients and unemployed in 2011
Algoma, Region and Ontario

	ES CLIENTS			UNEMPLOYED in 2011		
	Algoma	**Region**	**Ontario**	**Algoma**	**Region**	**Ontario**
No certificate	15.1%	25.3%	13.4%	20.7%	21.1%	17.9%
High school	36.9%	32.5%	29.6%	36.7%	33.5%	34.7%
"Other"	6.7%	8.9%	7.2%	9.8%	1.9%	3.8%
College	30.0%	26.4%	27.1%	20.5%	31.9%	24.0%
University	11.2%	7.0%	22.6%	10.1%	11.6%	19.6%

Source: Employment Ontario, Local Board Report, Algoma 13. 2011 National Household Survey, Statistics Canada.

"Other" under Unemployed in 2011 refers to those with a university diploma less than a Bachelor's degree. Northern Region unemployed educational attainment data represents North Bay, Greater Sudbury, Elliot Lake, Temiskaming Shores, Timmins, Sault Ste. Marie, Thunder Bay and Kenora CMAs.

Given the importance of education, it was noted ES providers put an emphasis on completing High school versus finding a job to individuals who have dropped out of school.

DESIGNATED GROUPS

ES allows individuals to self-identify as a designated group and it is possible to provide some context for understanding these numbers by turning again to the National Household Survey data. While the survey reflects 2011 data, there is no reason to believe that the actual proportions of different designated groups and their labour market outcomes would have changed all that much. The Survey proportions can provide a useful point of reference (there is, however, no labour market outcome data for persons with disabilities). Table 21 illustrates the comparison.

TABLE 21

Percentage of designated groups among 2012 ES clients and unemployed in 2011
Board, Region and Ontario

	ES CLIENTS			UNEMPLOYED in 2011		
	Board	**Region**	**Ontario**	**Board**	**Region**	**Ontario**
Newcomer	1.2%	1.9%	8.6%	0.5%	0.7%	6.7%
Visible minority	1.3%	1.9%	9.6%	1.6%	2.2%	31.5%
Person w/disability	3.1%	5.3%	4.3%	N/A	N/A	N/A
Aboriginal group	7.3%	12.6%	2.5%	13.9%	13.2%	3.4%

Source: Employment Ontario, Local Board Report, Algoma 13. 2011 National Household Survey, Statistics Canada.

Unemployed data for newcomers and visible minorities is from National Household Survey Cat. No. 99-012-X2011038, and for Aboriginal peoples from National Household Survey Cat. No. 99-012-X2011039.
Northern Region data represents North Bay, Greater Sudbury, Elliot Lake, Temiskaming Shores, Timmins, Sault Ste. Marie, Thunder Bay and Kenora CMAs. Board data for unemployed represents Sault Ste. Marie, except in the case of Aboriginal people, which includes Sault Ste. Marie and Elliot Lake.

The share of newcomers and visible minorities among ES clients in the Board area and the Northern Region pretty well matches their share among all unemployed in 2011 for these same areas. The same cannot be said for the Aboriginal population in the Board area, which appears to fall considerably short of their share of all unemployed. This can partly be explained by the fact the designation relies on self-identification, but it does also highlight that there is an opportunity to work more with First Nations employment programs.

TIME OUT OF WORK

The ES data identifies how long a client was out of employment or out of training at the time of intake. Table 9 compares this data for ES clients at the Board, Region and Ontario level with the length of time of all unemployed individuals in Ontario for 2012.

TABLE 22

Percentage distribution by length of time out of employment/training of ES clients Board, Region and Ontario, and unemployed individuals, Ontario, 2012

	ES CLIENTS 2012-13			ONTARIO
	Algoma	Region	Ontario	UNEMPLOYED
Less than 3 months	49%	49%	44%	60%
3 – 6 months	18%	16%	17%	17%
6 – 12 months	15%	14%	15%	15%
More than 12 months	18%	22%	24%	8%

Source: Employment Ontario, Local Board Report, Algoma 13. 2011 National Household Survey, Statistics Canada.

By and large, the distribution of ES clients by length of time out of employment or training is much the same between the Board, Region and the province. There are, however, two significant differences between these ES figures and the distribution of the unemployed in Ontario:

- ES clients represent significantly fewer people who have been out of employment for less than three months (in the Algoma area, this figure is somewhat higher than the provincial average, but still below the figure for Ontario unemployed); and
- ES clients represent significantly more people who have been out of employment for more than 12 months (again, for the Algoma area, this figure is somewhat lower than the region and provincial average, but still much higher than the figure for Ontario unemployed).

Individuals who have been unemployed for longer periods may be difficult to assist, as many barriers to employment need to be overcome. All ES providers have strategies to maintain motivation and optimism amongst clients who are out of work for longer periods of time.

OUTCOMES AT EXIT

The ES data indicates the outcomes at exit for clients. The following table compares the proportions in terms of these outcomes, between the Algoma area, the Northern Region and Ontario. The split in terms of outcomes is virtually identical across all three areas, with the District of Algoma showing slightly higher numbers for employed outcomes and slightly lower for training outcomes.

TABLE 23

ES client outcomes at exit
Algoma, Region and Ontario

	ALGOMA	REGION	ONTARIO
Employed	69%	64%	63%
Training	12%	16%	15%
No outcome	19%	20%	22%

Source: Employment Ontario, Local Board Report, Algoma 13.

Table 24 below identifies the top 10 occupational outcomes reported by employed clients and a comparison to ES outcomes for the region and Ontario.

TABLE 24

Top 10 Employed Outcome Occupations
(NOC) 4 Digit Level Unit Group

	Algoma		Region		Ontario
1	Construction Trades Helpers and Labourers	**1**	Construction Trades Helpers and Labourers	**1**	Retail Salespersons
2	Retail Salespersons	**2**	Retail Salespersons	**2**	Other Labourers in Processing, Manufacturing and Utilities
3	Cashiers	**3**	Cashiers	**3**	Cashiers
4	Cooks	**4**	Light Duty Cleaners	**4**	Construction Trades Helpers and Labourers 1,616.00
5	Food Counter Attendants, Kitchen Helpers and Related Support Occupations	**5**	Food Counter Attendants, Kitchen Helpers and Related Support Occupations	**5**	Food Counter Attendants, Kitchen Helpers and Related Support Occupations
6	Food and Beverage Servers	**6**	Cooks	**6**	Food and Beverage Servers
7	Light Duty Cleaners	**7**	Food and Beverage Servers	**7**	Light Duty Cleaners
8	Customer Service, Information and Related Clerks	**8**	Other Customer and Information Services Representatives	**8**	Cooks
9	Other Customer and Information Services Representatives	**9**	Food Counter Attendants, Kitchen Helpers and Related Occupations	**9**	General Office Support Workers
10	General Office Support Workers	**10**	Janitors, Caretakers and Building Superintendents	**10**	Other Customer and Information Services Representatives

Source: Employment Ontario, Local Board Report, Algoma 13.

All of the 10 occupational outcomes are entry level jobs and 5 out of the 10 fall within the service sector. This reflects a number of issues:

- Placements reflect the available opportunities – eg. Retail represents the largest number of employers in Algoma.
- Most clients are looking for jobs placements as quickly as possible and tend to move into the most readily available opportunities.
- Job seekers with more experience tend to take entry level jobs requiring more skills, even if they are over qualified, leaving only low skilled entry level jobs available.
- Not all organizations promote opportunities through Employment Services.

Table 25 looks at the distribution of EO Employed Outcomes by industry for the Algoma Workforce Investment Corporation area (District of Algoma), the Northern Region area (Parry Sound, Nipissing, Timiskaming, Cochrane, Manitoulin, Greater Sudbury, Sudbury, Algoma, Thunder Bay, Kenora and Rainy River) and Ontario and compares it to the distribution of employed residents for these areas (figures derived from the 2011 National Household Survey), as well as to the distribution of unemployed residents by the industry they are associated with (figures only available at the Ontario level).

TABLE 25

Industry Distribution of EO Employed Outcomes to Employed Algoma, Region and Ontario, and Unemployed by Industry in Ontario

	ALGOMA		REGION		ONTARIO		
	EO employed outcomes	Employed residents	EO employed outcomes	Employed residents	EO employed outcomes	Employed residents	Unemployed residents
Agriculture, forestry, fishing, mining	3.5%	2.9%	4.2%	7.2%	2.1%	2.0%	2.5%
Utilities	0.7%	1.0%	0.3%	1.0%	0.3%	0.9%	0.5%
Construction	9.3%	6.5%	11.8%	7.0%	7.2%	6.1%	10.1%
Manufacturing	5.3%	10.8%	6.6%	6.2%	11.1%	10.4%	12.3%
Wholesale trade	2.4%	1.9%	2.2%	2.5%	2.1%	4.6%	3.2%
Retail trade	18.0%	12.5%	17.3%	12.5%	15.5%	11.1%	12.6%
Transportation and warehousing	5.2%	4.0%	5.4%	5.0%	4.5%	4.7%	4.1%
Finance and insurance	1.1%	2.5%	1.3%	2.4%	1.8%	5.6%	3.1%
Real estate and leasing	1.1%	1.3%	0.9%	1.4%	1.3%	2.0%	1.4%
Professional, scientific and technical	3.0%	3.6%	2.4%	3.8%	5.0%	7.7%	6.1%
Management, administrative support	10.2%	5.1%	9.7%	3.2%	12.1%	4.5%	9.6%
Educational services	3.2%	8.3%	2.9%	8.7%	3.8%	7.5%	6.8%
Health care and social assistance	7.9%	14.8%	7.1%	15.1%	9.2%	10.6%	4.2%
Information, culture and recreation	6.0%	4.1%	3.6%	3.3%	4.3%	4.7%	6.3%
Accommodation and food services	14.5%	6.9%	15.8%	6.6%	11.6%	6.0%	10.0%
Other services	6.1%	4.5%	5.5%	4.5%	6.4%	4.4%	3.9%
Public administration	2.5%	9.2%	3.1%	9.5%	1.9%	7.0%	3.3%

Source: Employment Ontario, Local Board Report, Algoma 13. 2011 National Household Survey, Statistics Canada.

Several observations about the data:

- The Construction, Retail Trade, Management & Administrative Support and Accommodation & Food categories account for a notably higher proportion of EO employed outcomes than their share of local employed residents, and in the case of Retail Trade and Accommodation & Food, notably higher than those unemployed in those industries;

- Manufacturing, Educational Services, Health Care & Social Assistance and Public Administration account for a considerably lower share of EO employed outcomes than their share of local employed residents and often higher than those unemployed at the provincial level.

SECOND CAREER

157 clients participated in Second Career. The majority were between the ages of 25-44 at 62.4% and 45-64 at 24.2%. Males represented a significantly larger share 90 clients or 57.3% compared to females at 67 clients or 42.7%. The majority (50) held a secondary school diploma at the time of intake, but a significant number (39) held a college diploma. 21 people had less than high school.

The majority of Second Career clients represent EI recipients (88) with 56.1% with the balance reporting Ontario works 10.2% and other source of income at 26.1%.

TABLE 26

Top 10 Approved Skills Training Program for Algoma

1.	Transport Truck Drivers
2.	Underground Production and Development Miners
3.	Heavy Equipment Operators (Except Crane)
4.	Home Support Workers, Housekeepers and Related Occupations
5.	Early Childhood Educators and Assistants
6.	General Office Support Workers
7.	Welders and Related Machine Operators
8.	Administrative Assistants
9.	Licensed Practical Nurses
10.	Social and Community Service Workers

Many of the training programs selected for Second Career reflect the fact that people are looking for a 'quick fix' to find employment and therefore short programs (eg. 6 week programs). Issue raised regarding Second Career were that it is difficult to convince clients to invest in longer term training or education and that in smaller areas, the costs covered by the program do not take into account someone having to move to take training.

APPRENTICESHIP

During 2012-2013 apprenticeship reported that there were 365 new registered apprentices, 2,052 active apprentices, and 7326 active journeypersons in Algoma. The information below compares the top 10 registrations in Algoma to the region and province and the top 10 trades by journeypersons.

TABLE 27

Top 10 Trades: New Registrations

	Algoma		Region		Ontario
1	Information Technology - Contact Centre Customer Service Agent	1	Information Technology - Contact Centre Customer Service Agent	1	Information Technology - Contact Centre Customer Service Agent
2	Information Technology - Contact Centre Sales Agent	2	Heavy Duty Equipment Technician	2	Automotive Service Technician
3	Hairstylist	3	Industrial Mechanic Millwright	3	Hairstylist
4	Electrician - Construction and Maintenance	4	Information Technology - Contact Centre Sales Agent	4	Electrician - Construction and Maintenance
5	Automotive Service Technician	5	Automotive Service Technician	5	General Carpenter
6	Cook	6	Industrial Electrician	6	Child Development Practitioner
7	General Carpenter	7	General Carpenter	7	Cook
8	Heavy Duty Equipment Technician	8	Electrician - Construction and Maintenance	8	Truck and Coach Technician
9	Industrial Mechanic Millwright	9	Truck and Coach Technician	9	Information Technology - Contact Centre Sales Agent
10	Truck and Coach Technician	10	Hairstylist	10	Industrial Mechanic Millwright

Source: Employment Ontario, Local Board Report, Algoma 13

While the information provided does not allow us to track trends or changes, we do observe that service sector apprentices such as cook and child development practitioner are presently in demand. We can also observe similarities and differences with the region & province, most notably the top 2 trades in Algoma in Information Technology – which reflects that number of call centres in Algoma and specifically Sault Ste. Marie.

TABLE 28

Top 10 Trades: Active Journeypersons

	Algoma		Region		Ontario
1	Automotive Service Technician	1	Automotive Service Technician	1	Automotive Service Technician
2	Industrial Mechanic Millwright	2	Industrial Mechanic Millwright	2	Electrician - Construction and Maintenance
3	General Carpenter	3	Electrician - Construction and Maintenance	3	Industrial Mechanic Millwright
4	Electrician - Construction and Maintenance	4	Heavy Duty Equipment Technician	4	Hairstylist
5	Heavy Duty Equipment Technician	5	Truck and Coach Technician	5	Industrial Electrician
6	Hairstylist	6	General Carpenter	6	Truck and Coach Technician
7	Industrial Electrician	7	Hairstylist	7	General Carpenter
8	Truck and Coach Technician	8	Industrial Electrician	8	Plumber
9	Construction Millwright	9	General Machinist	9	General Machinist
10	General Machinist	10	Construction Millwright	10	Tool and Die Maker

Source: Employment Ontario, Local Board Report, Algoma 13

As noted previously, of those with post-secondary training or education, Apprentices have the highest level of unemployment. This reflects the some of the employment issues Apprentices find in getting a job such as employer reluctance to and current ratios.

AWIC PARTNERSHIP PROJECT UPDATES

Each year AWIC undertakes Community based Partnership Projects to address Labour Market issues in Algoma. The following chart provides a description and update on the projects we are undertaking this year (2012-13). The projects range from the impact of essential skills on apprenticeship completions, improving that level of training that is available locally, increasing communication and referals between agencies that have a labour force association and proactivily looking at the impact of an aging workforce on local businesses.

As we begin our planning cycle for 2013-14, AWIC will initiate four new projects that will address issues identified in this report. For more information on AWIC's activities, please visit our website at www.awic.ca

LIT119	Apprenticeship Completions Forums
Description	The Apprenticeship Completions Forum will promote Employment Ontario's new 'Supporting Apprenticeship Completions' program offered through local LBS providers.
Issue Addressed	The highest occupational demand is in trades and production such as underground miners, millwrights, mineral processors, heavy equipment operators and electricians. Work in the skilled trades provides good and well-paying jobs. Yet, literacy skills and/or educational gaps too often contribute to candidates not completing their apprenticeship qualifications.
Outcomes	Participants will be educated on how to better engage apprentices and those pursuing skills training programs and will have enhanced knowledge and awareness of supports and services and will know how to conduct appropriate referrals and expanded access to services.
Outputs	The research for this project is presented in the Consultation Report, Supporting Apprenticeship Completions: a Model of Service Provision. The Report is available on the Northern Literacy Networks website and on the AWiC website.
Key Partners	Mid-North Network Literacy Providers, Apprenticeship candidates in Northern Ontario Rural or Remote Communities, Employers, Unions/Trades Councils, Apprenticeship Offices, Employment Ontario Service Providers, Aboriginal Skills Employment Training Agencies (ASETA), Project Advisory Committee

OWD654	Algoma Training Consortium (ATC)
Description	The Algoma Training Consortium is a framework for employers and service providers to work together to identify training needs, source training resources, communicate existing training opportunities and share the costs of training.
Issue Addressed	The District of Algoma faces an ongoing challenge to update and maintain the skills and capacity in technology and trades required to maintain and grow a viable industrial, manufacturing and construction sector in the North. The high cost of training and administration costs makes regular training very difficult for any individual employer to invest in regular training for their employees. These costs make poaching of trained employees by the larger employers a short term fix but it only adds to the skills shortage in the community as a whole.
Outcomes	To provide cost-effective and innovative training solutions that successfully address the training needs of the Algoma region's employers. To identify the training requirements needed to upgrade the skills of the current/future workforce such as on-going health and safety requirements, technical skills, upgrading of essential skills and leadership development.
Outputs	Employers who participate in the Algoma Training Consortium (ATC) will share their Labour Market Information (LMI) and in turn AWiC will partner with service providers and other community stakeholders to ensure training in made available across Algoma and to report on the sectors labour market information.
Key Partners	Sault College, Confederation College, College Boreal, CSTEC, Employment Ontario Service Providers, Regional CFDC, ELNOS, Regional Chambers of Commerce. Employers in Construction, Manufacturing and Industrial sectors across Algoma.

OWD655	Community Specific Labour Market Asset Maps
Description	Localized directories of services and programs offered by service providers and agencies related to labour market issues.
Issue Addressed	Each year AWiC brings together a variety of stakeholders in the region to consultations and many were unaware of the programs and services offered by others in the community that related to labour market issues.
Outcomes	A consolidated directory of services and programs available locally which will allow for better integration of service delivery and clarity of roles for clients, employers and service providers.
Outputs	A directory of services and programs offered by service providers will be made available online and in print for each region within Algoma.
Key Partners	Employment Ontario Agencies, Ontario Works, Ontario Disability Support Program, Educational institutes, Ministries, LBS. programs, Employment Services, Adult learning, Business Development and Tourism

ILLM41	Employer Succession Planning
Description	Distribute a retail/business assessment survey to East Algoma employers to identify and address labour market issues and workforce challenges.
Issue Addressed	Businesses in East Algoma have faced a number of challenges in retail in recent years. The purpose of this research is to gather information from businesses in East Algoma to identify gaps in the hiring and training of employees, along with succession planning in order to develop strategies and training programs that will benefit local employers.
Outcomes	AWIC will work with partners to produce and execute a employer/ business survey for area employers to identify the workforce gaps/ opportunities in East Algoma. This information will be summarized in a report.
Outputs	Provide Data analysis on Blind River and Elliot Lake in the retail and business sectors. Current and localized data will be made available in a report and made available online.
Key Partners	Chambers of Commerce (Algoma inclusive) , Elliot Lake Centre for Development, Blind River Development Corporation, ELNOS, CFDC

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