ALGOMA WORKFORCE INVESTMENT CORPORATION

AWIC LOCAL LABOUR MARKET PLANNING REPORT

SPRING 2019

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and by the Government of Ontario

The views expressed in this document do not necessarily reflect those of the Government of Ontario.

CONTENTS

EXECUTIVE SUMMARY

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Algoma's Labour Market is constantly changing and evolving. It is important to identify the trends which have an impact on our local labour markets and recognize how they will continue to affect Algoma's workforce.

The first half of this report provides an overview of Algoma's Labour Market including:

- A summary of employment by sector and occupations
- Canadian Business Count data for Algoma
- The effects of an aging population on Algoma's workforce

We also take a deeper look at Algoma's 2016 Census data to uncover information about:

- Places of Work
- Jobs by Industry
- School attendance among youth 15 to 24
- Youth not is school, not employed and not looking (NEET)
- School attendance among adults in the labour force

Finally, you will find an update on AWIC's activities around the region.

BACKGROUND

BACKGROUND

Both qualitative and quantitative methodologies were used to produce this report. In addition to an analysis of the data provided by Employment Ontario it includes the results of our continuous data analysis and our monitoring of emerging and critical workforce issues. We collect information from a wide range of stakeholders and in a variety of ways, such as feedback from consultations, surveys, research reports, industry groups and associations.

Unless otherwise noted, the information and data found in this report is derived from both primary and secondary sources of data including:

- Statistics Canada's 2016 Census data;
- An analysis of Statistics Canada's Canadian Business Patterns data for June 2018, and comparisons to previous years;
- An analysis of data pertaining to clients of Employment Ontario services, for the fiscal year 2017-2018 and comparisons to the previous year, including observations arising from consultation with EO service providers;
- Labour Force Survey data;
- Taxfiler data;
- Vicinity Jobs tracking;
- Community Consultations.

The analysis of this data provides insights into changing employment patterns, trends relating to business establishments, and the characteristics and outcomes of individuals seeking employment services.

The purpose of this report is to provide an update on Algoma's labour market conditions, characteristics and trends. We hope that readers find the information relevant and applicable in the current context of our rapidly changing labour market. We are confident that this report will help service providers understand the usefulness and importance of the support they provide to Algoma's job seekers. Our Action Plan update illustrates how we engage with the issues identified through our research and consultations.

As with any report of this nature, the data included in the report represents a snapshot in time. Since the labour market in Algoma is always evolving, please use this report as guide to the overall trends that are impacting Algoma and visit awic.ca for the most up-to-date labour market research.

ABOUT AWIC

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The Algoma Workforce Investment Corporation (AWIC) is Algoma's Workforce Planning Board. AWIC's goal is to provide access to easy-to-understand, quality assured Labour Market Information (LMI) for the Algoma region that allows individuals to make decisions about future careers, employers to plan and find talent and community stakeholders to inform policy and support local workforces.

Operating as part of the Local Boards Network of Ontario, AWIC is one of 26 Workforce Planning Boards that are funded by the Ministry of Training, Colleges and Universities (MTCU). We thank our sponsor for their support in publishing this report and our community partners for their generous participation in the research.

This report was prepared by Tom Zizys, Labour Market Analyst and Jonathan Coulman, the Executive Director of the Algoma Workforce Investment Corporation (AWIC).

ALGOMA'S LABOUR MARKET

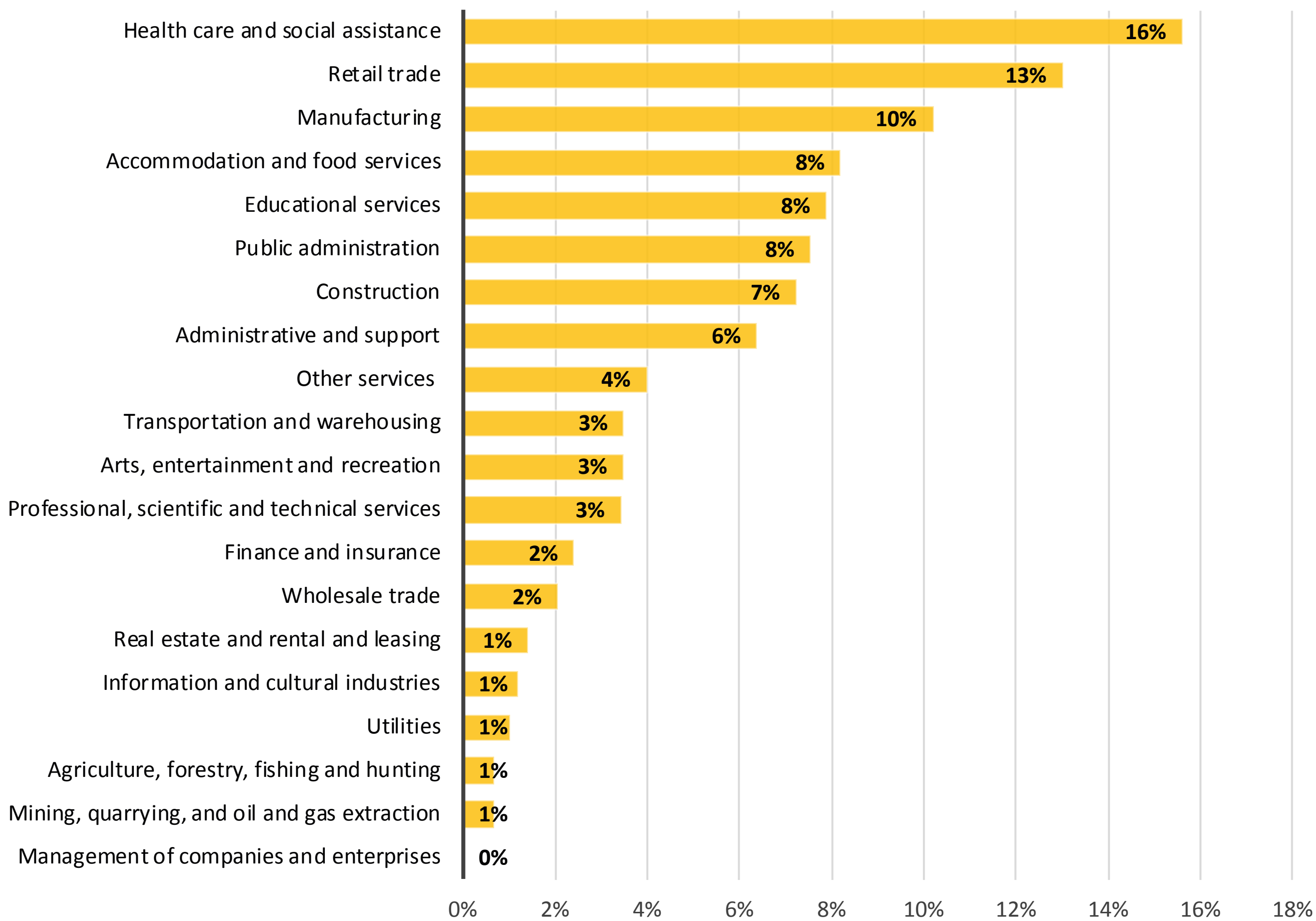
ALGOMA'S LABOUR MARKET

Employers are divided into broad types of sectors:

- Goods-Producing Sector – organizations that make things
- Services-Producing Sector – organizations that provide services

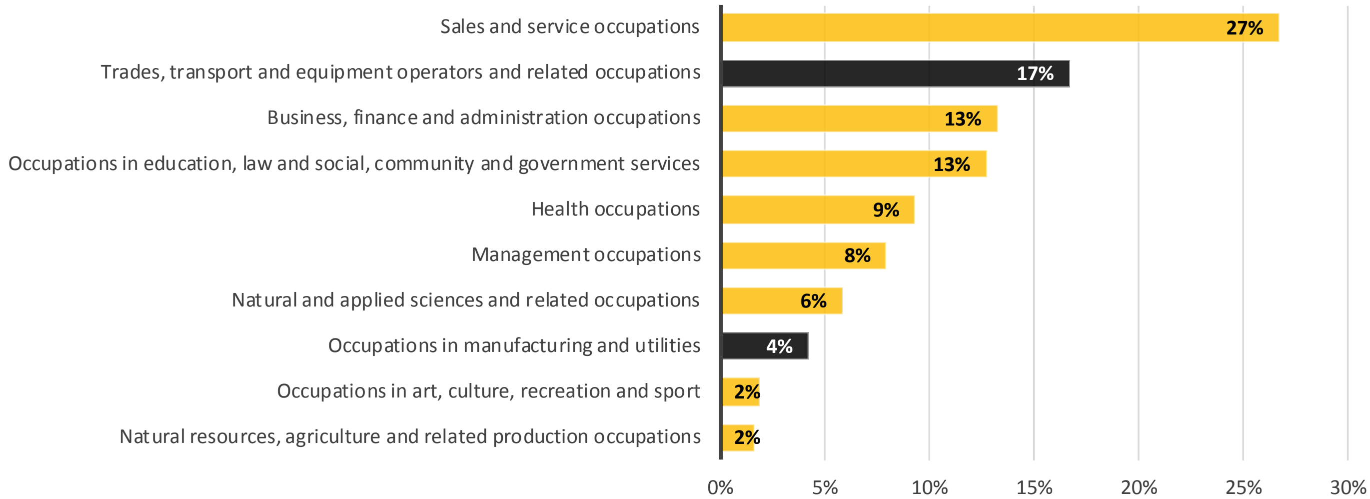
80% of jobs in Algoma are in the Services-Producing Sector – which includes Healthcare, Retail, Education and all levels of Government

20% of jobs in Algoma are in the Goods-Producing Sector – which includes Manufacturing, Utilities and Construction



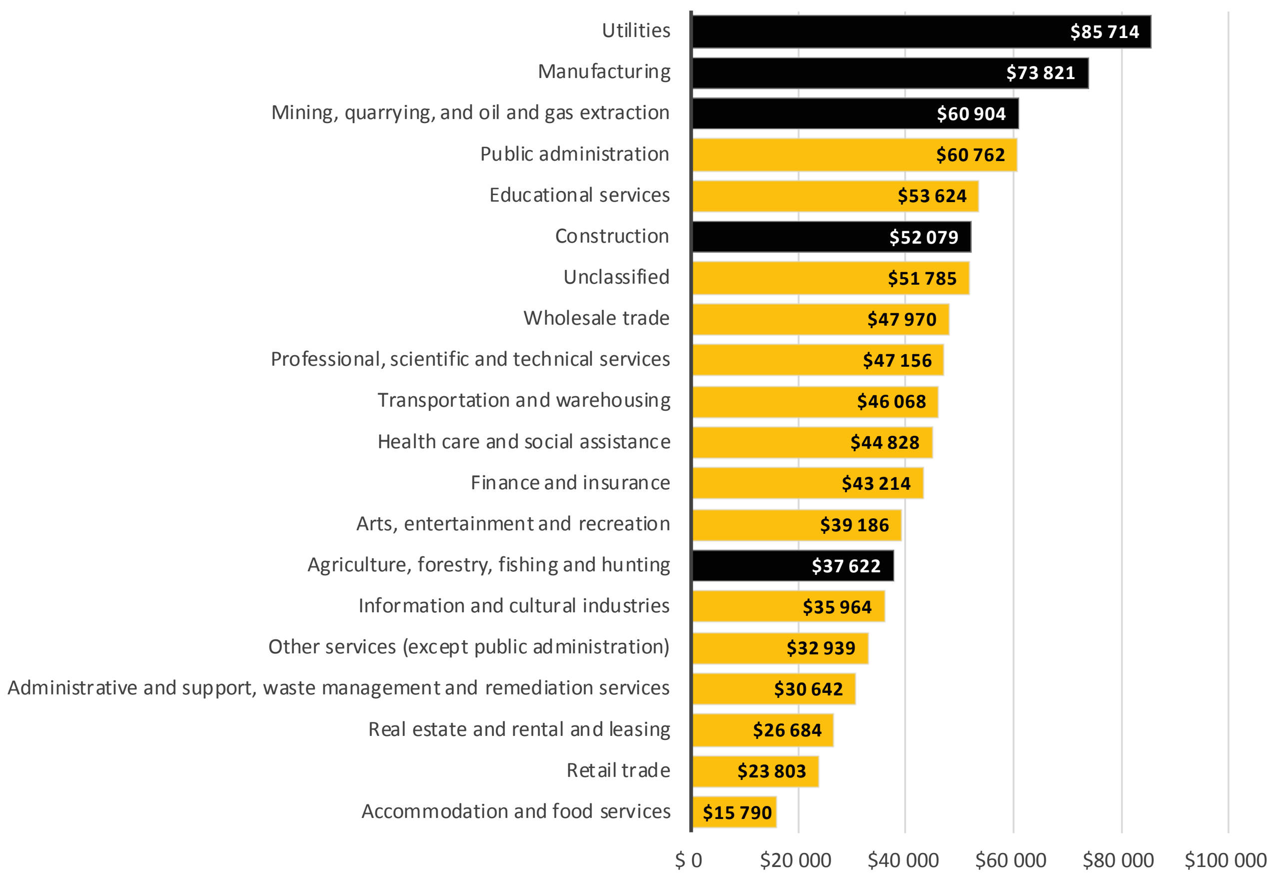
Statistics Canada 2016 Census

As you might expect, the ranking of Occupations (by job classification) follows the same trends as the Industry make up in Algoma. Most people work in Sales and Service occupations, which are also the top occupations in the province.



Statistics Canada 2016 Census

The highest paying sectors are the Goods Producing Sectors. These sectors have occupations that generally require specialized skills and training in order to work in them.



Statistics Canada 2016 Census

CANADIAN BUSINESS COUNTS – LABOUR MARKET INDICATORS

CANADIAN BUSINESS COUNTS – LABOUR MARKET INDICATORS

Introduction

Statistics Canada maintains an on-going count of business establishments across the country, relying on administrative data (corporate income tax and GST files) and surveys of businesses. The information for this section comes from this data set, called Canadian Business Counts.

Number of businesses, by size of establishment and by industry

Table 1 provides the summary data for all businesses located in the District of Algoma for June 2018. The table provides two different counts:

1. **Classified businesses:** the major part of the table provides the data for all businesses for which the industry classification is known and shows the breakdown by number of employees as well;

2. **All businesses, classified and unclassified:** the last three rows of the table present the distribution of all businesses (classified and unclassified) by number of employees; roughly 10% of the total counts in Algoma represent businesses that are unclassified, lower than the provincial average of 13%. This simply means that for these businesses, Statistics Canada was unable to identify which industries these businesses belonged to.

The second-to-last column shows the percentage distribution of all classified businesses by industry.

The last column shows the ranking of the total number of classified businesses by industry, from the largest (1) to the fewest (20) number of businesses. The five industries with the greatest number of classified businesses have their ranking numbers bolded.

The highlighted cells identity the three industries with the largest number of firms for each employee size category column.

If the percentage distribution is 0%, it does not mean there are no firms in that category, only that the number of firms, when expressed as a percentage of the total, is below 0.5% and has been rounded down to 0%.

TABLE 1 - ALGOMA DISTRICT NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE JUNE 2018

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	212	60	17	8	4	1	0	302	4%	9
21 Mining	9	5	0	2	1	1	2	20	0%	20
22 Utilities	22	2	2	2	4	0	4	36	1%	19
23 Construction	367	171	88	38	28	8	2	702	10%	3
31-33 Manufacturing	66	26	13	18	14	6	6	149	2%	13
41 Wholesale Trade	63	29	26	19	11	2	0	150	2%	12
44-45 Retail Trade	257	143	151	116	59	16	10	752	11%	2
48-49 Transportation/Warehousing	168	37	17	18	16	3	3	262	4%	10
51 Information and Cultural	23	18	19	2	4	2	0	68	1%	15
52 Finance and Insurance	302	42	26	16	14	2	1	403	6%	8
53 Real Estate, Rental, Leasing	1147	70	19	7	1	2	0	1246	18%	1
54 Professional Scientific Tech	312	117	38	24	9	5	0	505	7%	6
55 Management of Companies	39	4	2	0	1	0	0	46	1%	17
56 Administrative Support	93	54	40	15	7	5	2	216	3%	11
61 Educational Services	32	7	5	2	2	0	4	52	1%	16
62 Health Care & Social Assist	330	154	51	48	42	6	13	644	10%	4
71 Arts, Entertainment & Rec	76	23	9	12	4	2	2	128	2%	14
72 Accommodation & Food	153	66	55	76	45	13	7	415	6%	7
81 Other Services	314	195	67	33	16	4	1	630	9%	5
91 Public Administration	2	3	7	7	15	5	6	45	1%	18
CLASSIFIED BUSINESSES	3987	1226	652	463	297	83	63	6771		
Percentage of all classified and unclassified businesses	61%	18%	9%	6%	4%	1%	1%	100%		
Cumulative percentage	61%	79%	88%	94%	98%	99%	100%			
ONTARIO percentage of classified and unclassified businesses	71%	17%	5%	4%	2%	1%	1%			

Statistics Canada, 2016 Census

Some observations:

- **Number of small firms:** Businesses are by far made up of small establishments. 61% of the classified and unclassified firms in Algoma have no employees[1], and another 18% have 1-4 employees; Algoma has fewer solo establishments (61%) among its businesses compared to the Ontario average of 71% (the last row of the table);

- **Highest number of firms by industry:** The second to last column provides the percentage distribution of all firms by industry. The five industries with the largest number of firms in Algoma are Real Estate, Rental, & Leasing, accounting for 18.4% of all firms; the second largest, Retail Trade, represents 11.1%; third, Construction, represents 10.4%; fourth, Health Care & Social Assistance, at 9.5%; and, fifth, Other Services (such as auto repair stores, hairdressers, nail salons and so on) at 9.3%: by way of context, the five largest industries by number of firms in Ontario are: Estate and Rental & Leasing (19.7%); Professional, Scientific and Technical Services (14.3%); Construction (10.2%); and then a near tie: Health Care & Social Assistance (7.1%) and Retail Trade (6.9%);

- **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 very large number of firms in the no employee size category drives the total numbers (that is, for Real Estate and Rental & Leasing; Construction; and Health Care & Social Assistance). In the mid-size ranges, firms in Retail Trade and Accommodation & Food Services come to the fore. Among the largest firms, three industries are prominent: Health Care & Social Assistance; Retail Trade and Accommodation & Food Services.

Drilling down further:

Almost two-thirds (65%) of all firms (with or without employees) are to be found in Sault Ste. Marie. Elliot Lake accounts for another 7%, and around 4% are found in each of: Algoma, Unorganized, North Part; Blind River; and Huron Shores.

The large number of firms in the Real Estate and Rental & Leasing category is by far made up of landlords of residential buildings and dwellings, followed more distantly by landlords of non-residential buildings and dwellings, and by real estate agents (residential landlords outnumber the real estate agents by about a seven-to-one ratio).

In the Retail Trade sector, the subsectors with the most numbers of stores with employees are (in order of largest): convenience stores; pharmacies; beer, wine and liquor stores; supermarkets; and gasoline stations with convenience stores.

In the Construction industry, by far the largest subsector by number of firms with employees is residential building construction, followed by a distant second and third by plumbing, heating and air-conditioning contractors and then electrical contractors.

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[1] This actually undercounts the number of self-employed individuals. The Statistics Canada's Canadian Business Count 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.

In the Health Care & Social Assistance industry, two categories of firms will be profiled. Among firms with no employees, the largest numbers are found in the subsectors of: offices of physicians; offices of all other health practitioners (this is a grab-bag category that includes acupuncturists, dental hygienists, dieticians, naturopaths, podiatrists and others); child day care services; and offices of dentists. Among firms in this industry with employees, the largest categories are: offices of physicians; offices of dentists; offices of all other health practitioners; and residential developmental handicap facilities. The Health Care & Social Assistance industry is one of the few sectors where different sub-categories predominant among different-sized firms. Thus, offices of medical practitioners are largely in the range of zero to nine employees. Child day care centres range from zero to 49 employees, while residential developmental handicap facilities have firms in the five to 49 employee range. Nursing care facilities have most of their establishments in 20 to 499 employee size categories, while most hospitals have over 200 employees.

Among Other Services, the single largest sub-category is represented by religious organizations, which include places of worship as well as missions, convents and reading rooms promoting a religion. Beauty salons and general auto repairs are slightly behind and almost tied, at second and third place. In forth place comes unisex hair salons, and fifth is commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance.

Change in the number of firms by industry, June 2017 to June 2018

Changes in the number of employers are experienced differently across the various industries. Table 2 highlights the changes in the number of firms by industry and by employee size between June 2017 and June 2018 for Algoma. The table also lists the total number of firms in each industry in June 2018, to provide a context. The colour-coding of the tables (green where there is an increase, orange where there is a decrease) helps to illustrate any pattern.

It should be noted that Statistics Canada discourages comparisons of this sort, on the grounds that their data collection and classification methods change. At the very least, these comparisons can provide the foundation for further inquiry, tested by local knowledge about changes in industries.

It is not always easy to assess what the changes in the number of firms by different size categories might mean. Certainly, where there are only increases (such as in Construction, Information & Cultural Industries, Professional, Scientific & Technical Services, and Management of Companies & Enterprises), the net effect is obviously an increase in employment. In the same way, across the board declines mean a loss of employment (as in Utilities, Wholesale Trade, Finance & Insurance, and Arts, Entertainment & Recreation).

It becomes more challenging to make an assessment on the net impact on employment where there are mixed results. It is likely the case, as in Agriculture, Forestry, Fishing & Farming, that a loss of 12 establishments with no employees and a gain of 8 establishments in the 1-19 employee category results in net employment gain, even those the sector as a whole lost four firms. Similarly, a gain of three firms with no employees in Manufacturing, countered by a loss of four firms in the 1-19 employee range and two firms in the 20-99 employee range very likely means a loss of employment.

But an example such as Transportation & Warehousing illustrates that one would have to guess as to the impact on net employment with a decline of 6 firms with no employees and five firms with 1-19 employees countered by a gain of two firms in the 20-99 employee group. The gains could be two firms growing from 18 to 22 employees, with a gain of eight jobs, or two new firms being created, each with 50 employees.

Overall, looking at the mix of gains and losses in Table 2, one could probably say that if net employment has been impacted, it is likely a slight loss of jobs. Even though there was a net increase in the total number of firms of 37, there were 45 more firms in the zero-employee category, and thus a net loss of eight firms among establishments with employees (notably, there was decline of six firms with over 100 employees).

Perhaps more telling is what has been the longer-term trend. Table 3 shows the total number of firms with employees in Algoma District by industry for each of the last four years. There has been a net decline of 155 firms, approximately 5%, with the largest absolute declines among Health Care & Social Assistance, Finance & Insurance, Real Estate & Rental and Leasing, Other Services and Construction. One industry has had a notable increase in the number of firms: Information & Cultural Industries.

TABLE 2 - DISTRICT OF ALGOMA CHANGE IN THE NUMBER OF EMPLOYERS, BY INDUSTRY AND BY FIRM SIZE, JUNE 2017 TO JUNE 2018

INDUSTRY	Firm size (number of employees)					Total number of firms June-18
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing, farming	-12	8	0	0	-4	302
Mining and oil and gas extraction	1	2	2	-1	4	20
Utilities	-1	-1	0	0	-2	36
Construction	9	2	0	1	12	702
Manufacturing	3	-4	-2	0	-3	149
Wholesale trade	-3	-4	-1	0	-8	150
Retail trade	-9	8	0	-2	-3	752
Transportation and warehousing	-6	-5	2	0	-9	262
Information and cultural industries	0	14	1	0	15	68
Finance and insurance	-3	-3	-2	-1	-9	403
Real estate and rental and leasing	48	-13	-2	0	33	1246
Professional, scientific and technical services	7	2	0	0	9	505
Management of companies and enterprises	3	0	1	0	4	46
Administrative and support	-2	9	-1	-2	4	216
Educational services	-2	-8	1	0	-9	52
Health care and social assistance	19	-22	15	-1	11	644
Arts, entertainment and recreation	-2	-2	-1	0	-5	128
Accommodation and food services	3	-4	-1	1	-1	415
Other services	-6	1	5	0	0	630
Public administration	-2	-1	2	-1	-2	45
TOTAL	45	-21	19	-6	37	6771

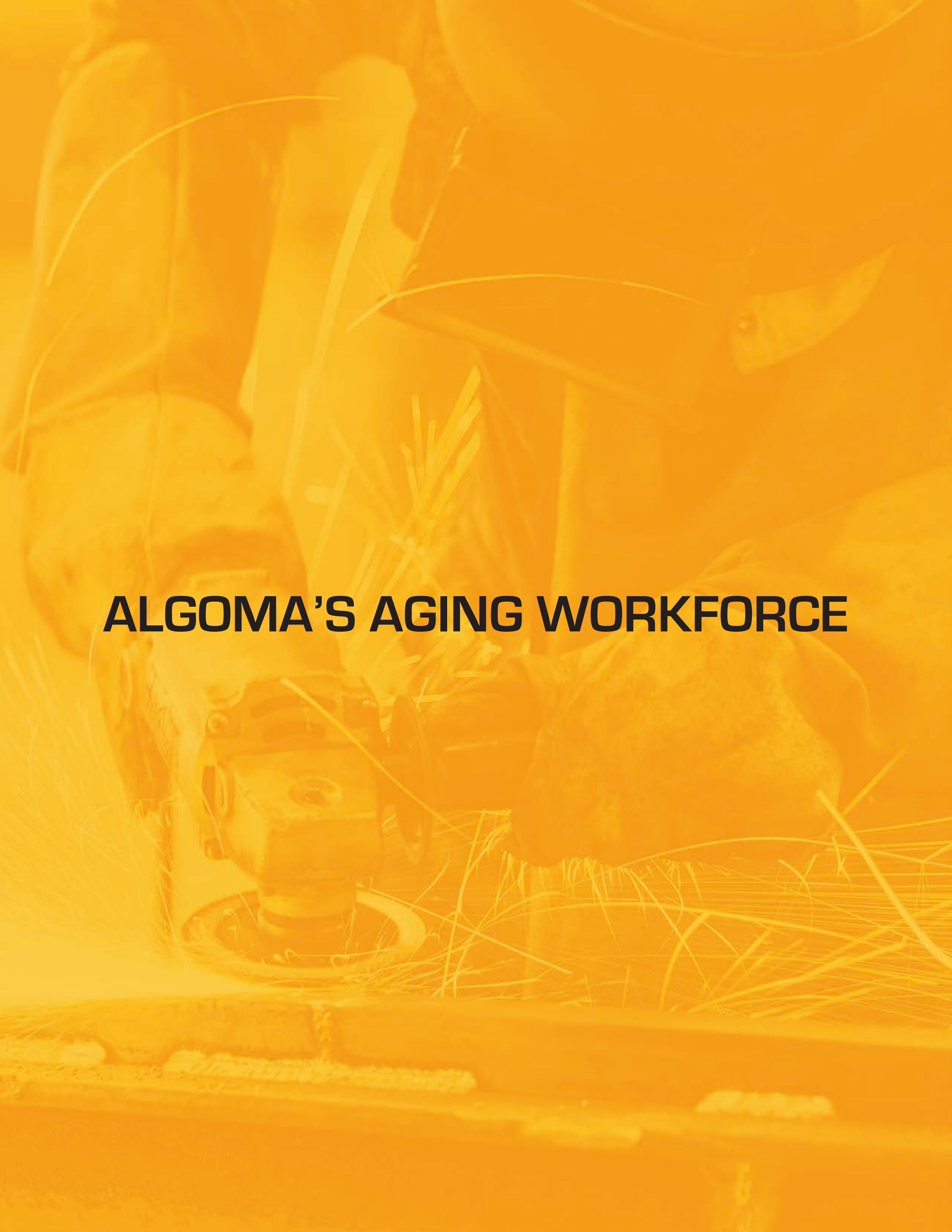
Statistics Canada, Canadian Business Counts, June 2017 and June 2018

TABLE 3 - DISTRICT OF ALGOMA TOTAL NUMBER OF FIRMS WITH EMPLOYEES BY INDUSTRY 2015-2018

	2015	2016	2017	2018
Agriculture, forestry, fishing and farming	80	81	82	90
Mining and oil and gas extraction	9	8	8	11
Utilities	14	15	15	14
Construction	355	349	332	335
Manufacturing	90	85	89	83
Wholesale trade	96	97	92	87
Retail trade	503	494	489	495
Transportation and warehousing	105	106	97	94
Information and cultural industries	26	30	30	45
Finance and insurance	123	105	107	101
Real estate and rental and leasing	121	121	114	99
Professional, scientific and technical services	201	191	191	193
Management of companies and enterprises	15	14	6	7
Administrative and support	121	123	117	123
Educational services	29	27	27	20
Health care and social assistance	344	331	322	314
Arts, entertainment and recreation	55	52	55	52
Accommodation and food services	276	266	266	262
Other services	338	321	310	316
Public administration	38	42	43	43
TOTAL	2939	2858	2792	2784

Statistics Canada, Canadian Business Counts, June 2015, June 2016, June 2017 and June 2018

ALGOMA’S AGING WORKFORCE



ALGOMA'S AGING WORKFORCE

The 3 biggest trends that are having a significant impact on Algoma's labour market are:

- An aging workforce
- The speed of technologic change
- The changing nature of work

AWIC has described each of these trend's in previous reports and presentations which can be found on our website at www.awic.ca.

In this report we will unpack Algoma's aging workforce for a more detailed look as it is having the most significant impact on both employers and employees in Algoma – and the impacts will only get more significant in the years to come.

An aging population

It is no secret that Algoma has an aging population, AWIC has been pointing this fact out in numerous presentations and reports. It bears repeating, the general population of Algoma is significantly older than the rest of the province and is getting older every day.

Median Age	
Ontario 41 years	Algoma 49 years

Looking at the demographic trends in Algoma over the last 20 years, we can clearly see that the proportion of those aged 15 years old and younger has decreased, while those 65 years of age and older has increased significantly.

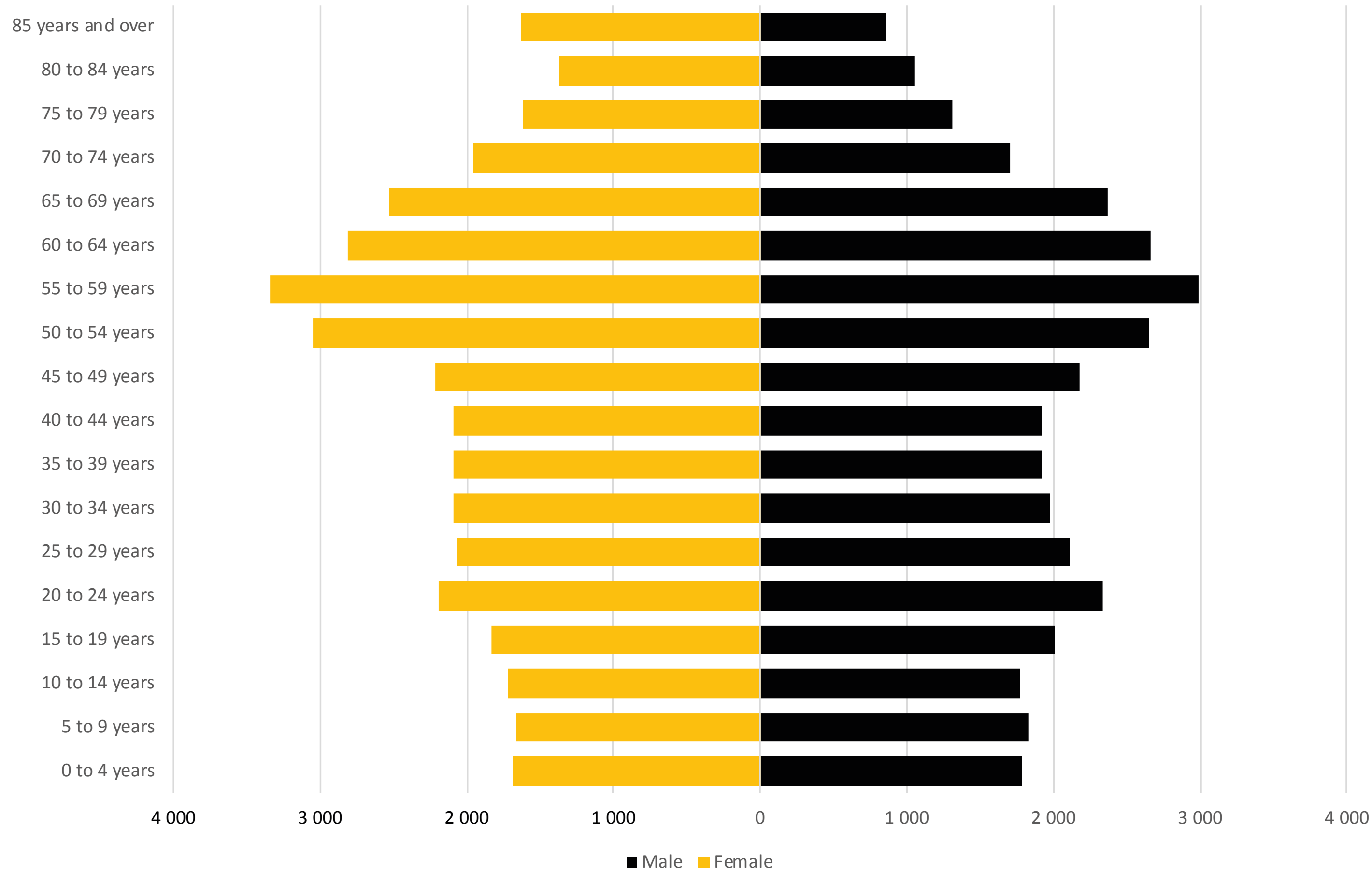
TABLE 4 - ALGOMA REGION CENSUS TRENDS

	1996	2006	2016
Total population count	125,455	117,460	114,095
% of the population aged 0 to 14 years	20%	15%	14%
% of the population aged 15 to 64 years	66%	66%	62%
% of the population aged 65 years and over	14%	19%	24%
Median age	37	45	49
Ratio of age groups 0 to 14 years to 65 years and over	1.5	0.8	0.6

Statistics Canada 1996, 2006 and 2016 Census

Where once we would describe the profiles of populations as 'population pyramids', Algoma's current population profile more closely resembles a fire hydrant. Given that half the population is over the age of 49 and that life expectancy in Algoma is 76 years old for men and 82 years old for women, one can clearly see the significant proportion of the population moving towards those age ranges. Conversely, one can also see that the population has thinned out in years younger than 49.

Sault Ste. Marie Population 2016



Statistics Canada 2016 Census

So, what happened to the pyramid? Well as a population we are not replacing ourselves in Algoma, either through births or migration into the region.

Birthrates in Algoma

Total Fertility Rate (TFR) is the number of children who would be born per woman (or per 1,000 women) if she/they were to pass through the childbearing years bearing children according to a current schedule of age-specific fertility rates. The replacement level of fertility for any population is thought to be 2.1 children per woman – which makes sense, potentially one female and male child. It is estimated that Ontario's TFR in the range of 1.5 to 1.65 children per woman.

While the TFR for Algoma is not published, according to the Algoma Public Health, on average, 1,034 babies are born each year in Algoma. This equates to 8.8 births per 1,000 residents in Algoma. If we compare this to the Ontario rates of 9.9 births per 1,000 residents and a Canadian rate of 10.8 births per 1,000 residents, we can see that Algoma has a lower birth rates per 1,000 residents.

Given that Algoma's birth rate has been stable for the past 10 years, aging will have a negative effect on the birth rate as the number of females of reproductive age in Algoma decreases. In 1996 25% of Algoma's population were females between the ages of 15 and 49 years of age compared to 19% in 2016.

ALGOMA FEMALE DEMOGRAPHICS

	1996	2016
Total Population	125455	114095
Females 15-49 years old	31730	21250
% of Population	25%	19%

Statistics Canada 1996 and 2016 Census

Migration

As birth rates remain low, population growth is dependant on migration patterns – people moving to Algoma from other locations. Unfortunately, migration data is not consistently gathered and the most recent data available is for the years 2012 and 2013. At that time the average in-migrations each year to Algoma were 2,242 people compared to average out migrations of 2,732 people. This equates to an average net out-migration of 490 people.

Given that Algoma's over all population has decreased between Census years, it is safe to assume that in migration to the region still does not exceed out-migrations.

Immigration

400 people immigrated to Algoma between 2011 and 2016. This is a relatively low number, but we know immigration levels have increased in recent years as the District welcomed refugees into the region. In 2016 alone 50 refugees resettled into the region as Government Assisted Refugees.

Even at these increased levels, immigration into the region is relatively small compared to the levels of in- migration and out-migration.

At a national level, Canada has committed to increasing immigration levels into the country over the next 3 years. Hopefully Algoma will benefit from increased levels of immigration, especially through pilot programs such as the Rural and Northern Immigration Pilot. Target levels are not set for the District, but if we look the national targets for the entire population, we can calculate a target based on Algoma's proportion of the population (this should be considered an optimistic estimate as most immigration tends to cluster in areas of greater population density).

	2019	2020	2021
National Immigration Targets - Economic	330,800	341,000	350,000
Targets based on Algoma's proportion of Canada's population (0.3%)	992	1,023	1,050

Immigration, Refugees and Citizenship Canada – 2018-2020 Immigration Levels Plan

Immigration is further broken down into 3 categories: Economic, Family Reunification and Refugees. While people who immigrate through all 3 paths could end up as part of the labour force, immigration through the Economic programs result in immediate resources for the labour market.

	2019	2020	2021
National Immigration Targets - Economic	191,600	195,800	202,300
Targets based on Algoma's proportion of Canada's population (0.3%)	575	587	607

Immigration, Refugees and Citizenship Canada – 2018-2020 Immigration Levels Plan

The impact of aging Algoma's Labour Market

In 2016, almost half of the working-age population in Algoma was 55 or over.

In 2016, people in Algoma age 55 and over accounted for 48% of the working age population (aged 15 and over), up from 43% in 2011 and noticeably higher than 20 years ago in 1996 when 30% of the working age population was over 55. By contrast people aged 55 and over in Ontario accounted for 36% of the working age population in 2016.

Given the median age of Algoma's population is 49 years old, this proportion of the working age population will continue to grow. The increases in among this group are mostly due to the first wave of baby boomers who began to turn 55 in 2001. In 2016, this cohort was between the ages of 51 and 70. By 2021, the baby boom cohort will have fully transitioned past the age of 55.

People 25 to 54 years of age are considered to be of core working-age because of their strong attachment to the labour market. Their population share in Algoma fell from 53% in 1996 to 46% in 2006 and to 40% in 2016.

The share of the population aged 15 to 24 also declined from 1996 to 2016, from 17% to 12%

Fewer are entering than exiting Algoma's labour market

In 2016, there were 12,100 youths aged 15 to 24 in Algoma and 19,700 aged 55 to 64, meaning there is a widening gap between the number of younger people entering the labour force and the number of people preparing to exit the labour market.

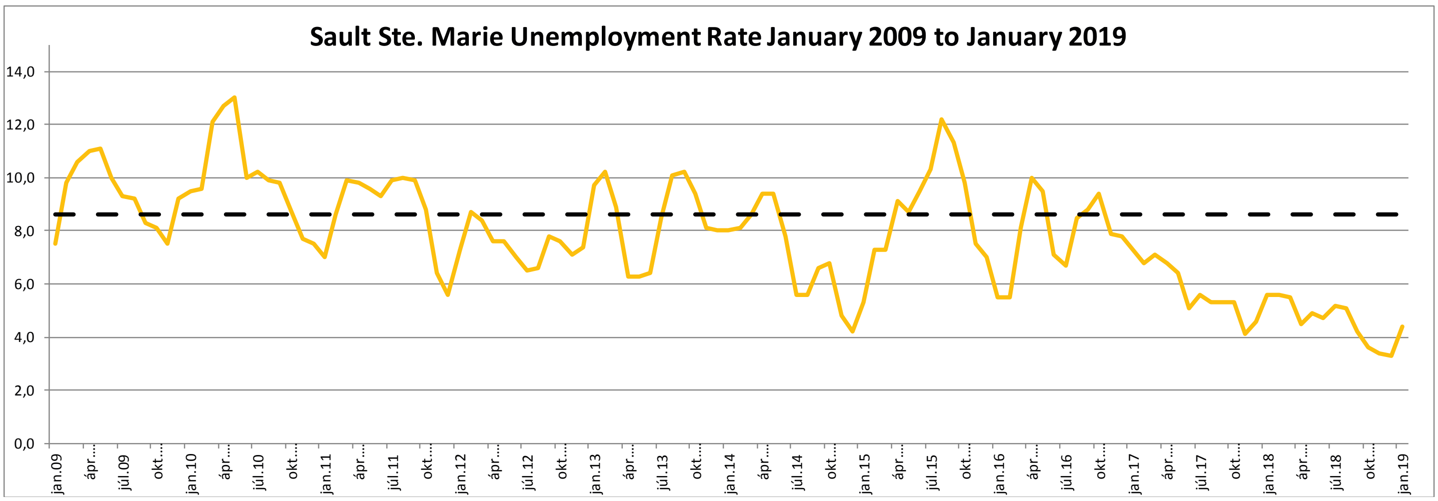
The ratio of youths to people 55 to 64 years old was 0.6 in 2016. This is below the replacement rate of 1. For comparison, 20 years ago in 1996, youth out numbered the older demographic by ratio of 1.3.

Tighter Labour Market

There is no question that Algoma employers are having difficulty filling job openings as indicated by low participation rates and low unemployment rates.

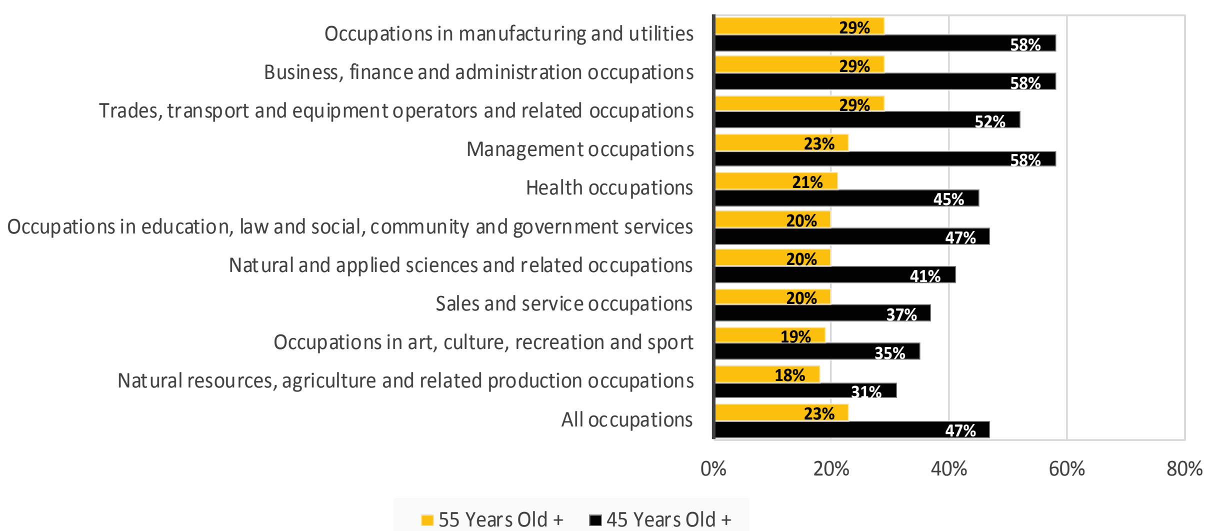
In the 2016 census, Algoma's participation rate was 55%, substantially less than then Ontario's overall participation rate of 65%. This means that Algoma has a larger proportion of its population that is not participating in the labour market (either by working or actively looking for work). Having an older population means that there are more people who have left the labour market all together through retirement.

Algoma is also seeing low levels of unemployment. Unfortunately, monthly unemployment rates are not available for the region, but we do have monthly updates for Sault Ste. Marie. At the time of writing, Sault Ste. Marie is experiencing a period of very low unemployment, the lowest it has been in the past 20 years. In January 2019 the city's unemployment rate was 4.4% as compared to the Province's rate of 5.7%.



Statistics Canada Labour Force Survey

The challenges Algoma employers are facing today are really just the tip of the demographic iceberg. Employers are filling the labour gaps with overtime and delayed retirements, but as the population and workforce continues to age, this will no longer be possible. Almost a quarter of Algoma's workforce is over the age of 55 years old and almost half is over the age of 45 years old. As the group 55 years and older retire in the coming years, employers in the district will be looking to replace as many as 11,000 workers.



Another indicator of the community's tight labour market is the increase in online job postings. Online job postings have increased by 20% since 2016 and 4th quarter postings have increased by 30% over the past 3 years[2].

The effects of the aging workforce on Algoma's labour market is compounded by the fact that some of the largest sectors of employment in the region have among the oldest workforces. Recent AWIC surveys of employers in the health care, manufacturing and construction sectors showed that over 80% of employers in these sectors have hired in the past year and most had difficulty filling positions.

TABLE 5

	Hiring	Jobs in Demand	Outlook
Health Care	• 80% of health care employers hired in the previous year • 63% had difficulty filling positions • 40% of health care employers did not think they had adequate resources • Rates of overtime as high as 30%.	• Personal Support Workers • Registered Nurses • Registered Practical Nurses	• 21% of the health care workforce is over 55 years old • 46% is over the age of 45 years old
Manufacturing	• 80% had hired in the previous year • 60% had difficulty filling positions	• Millwrights and industrial mechanics • Welders • Machine Operators • Industrial Electricians • Labourers in Metal Fabrication	• 29% of the manufacturing workforce is over 55 years old • 58% is over the age of 45 years old
Construction	• 90% had hired in the previous year • 47% of respondents had issues finding and hiring people • 93% of respondents plan on hiring in the upcoming year	• General Labour • Carpenters • Heavy equipment operators • electricians • Truck drivers	• 29% of the trades and equipment operator workforce is over 55 years old • 52% is over the age of 45 years old

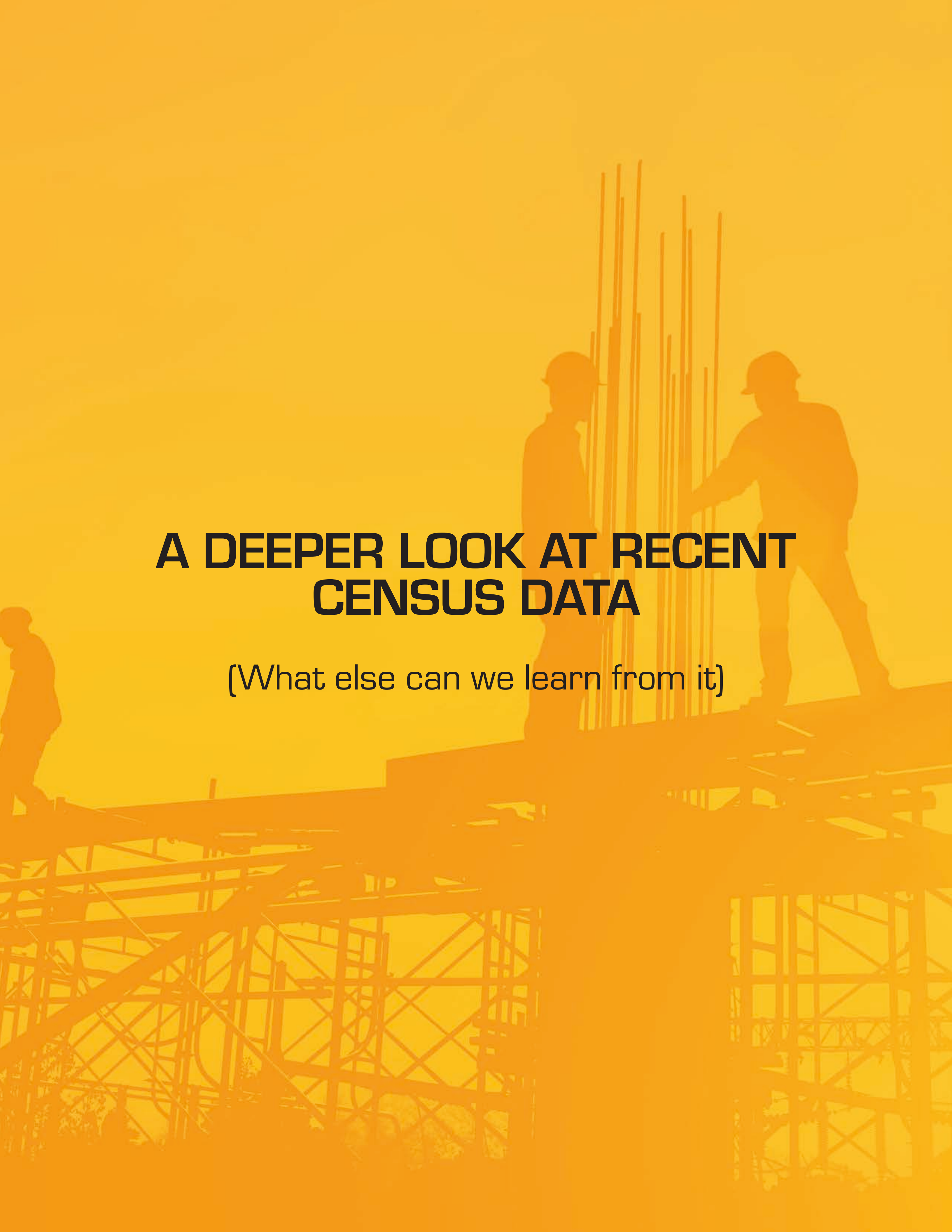
AWIC Surveys of Health Care, Manufacturing and Construction Employers. Results available at awic.ca

[2] AWIC uses a tool called Vicinity Jobs to track online job postings in Algoma

Attraction, Retention and Talent Development

In a tight labour market, employers need to focus on how best to attract new employees to their business in a competitive environment, how to retain their best talent and how to continually develop their employees to fill the critical roles where they are losing people to retirement.

The same can be said for Algoma's communities. Each needs to have an effect value proposition for people to stay and move into the community along with looking at ways to develop underutilized groups within the community to fill gaps left by the aging workforce.



A DEEPER LOOK AT RECENT CENSUS DATA

(What else can we learn from it)

A DEEPER LOOK AT RECENT CENSUS DATA (What else can we learn from it)

Introduction

Every five years, Canada carries out a national census, the most recent being in 2016. In addition to the questions, a 25% sample of census respondents is asked to complete a long-form questionnaire on questions beyond the basic demographics of age and residency, which includes a significant number of questions about labour market participation, such as levels of employment, occupation, industry, employment income and so on.

As part of its support for workforce planning boards, the Ontario Ministry of Training, Colleges and Universities commissions a set of customized data from Statistics Canada, which involves cross-tabulations of the national survey results that are relevant to describing and analyzing the local labour market. This data allows workforce planning boards to provide insights that would otherwise not be available, except where an institution was willing to purchase this same data. This census year, the Ministry purchased the data not only at the planning board and region/county/district level, but also at the level of municipalities.

This labour market analysis relies entirely on this 2016 Census data, and explores the following topics:

- **Place of work:** What is the physical location of the job, firstly, whether it is at home, in a usual place of work or with no fixed location and, secondly, what is the actual number of jobs with a usual place of work (excluding working at home) in a given jurisdiction; this information is provided for each municipality where the data is available;

- **Local jobs by industry:** The total number of jobs within a given jurisdiction (both usual place of work and working from home), and a percentage breakdown for each municipality by industry;

- **School attendance among youth aged 15 to 24 years old:** This data is for the entire Algoma Workforce Investment Corporation area, and identifies the proportion of youth not attending school and attending school, and for the latter, by level of schooling; the data is broken down for younger youth (aged 15-19 years old) and older youth (20-24 years old), and by males and females;

- **Youth not in school, not employed and not looking for work (NEET):** This data provides the number and percentage of youth, by the two age categories, by gender and by level of educational attainment who are no longer in school but also not employed and not looking for work; apart from those who may be raising children, many of these youth would likely require more intensive assistance to find a footing in the labour market;

- **School attendance among adults in the labour force:** For adults aged 25 to 44 years old, the percentage by gender and by prior level of education attending school while in the labour force; this is one indicator of the degree to which adults are engaged in further education or training.

The area covered by the Algoma Workforce Investment Corporation (AWIC) contains 31 of the 32 census subdivisions located within the District of Algoma, with the exception of Hornepayne Township, which has been assigned to the Far Northeast Training Board.

Place of Work

One statistic which is important for understanding the labour market is counting the number of jobs. However, there are several ways to express the number of jobs, which this section will present.

Most labour market data is expressed in terms of residents, and their place of work status describes where their jobs are to be found. This includes working from home, working outside of Canada (a very small amount which is not being displayed in the accompanying tables), working in a job that does not have a fixed workplace (for example, a construction labourer moving from worksite to worksite), and a job with a fixed workplace (going to the same workplace every day, a "usual place of work") – this is by far the most common type of workplace location.

All this data relates to AWIC area residents; however, it does not tell us where geographically they work (except for those working from home). Certainly, those jobs with no fixed workplace can be anywhere, but so can the jobs with a fixed workplace – they could be in Algoma or in a neighbouring district.

The other type of place of work data refers to where the job is located: it provides the actual count of jobs in a given locality. It certainly includes individuals working from home, but it cannot include jobs with no fixed workplace, because those jobs are moving. Moreover, it does not tell us where the workers come from. A job in a given town may be filled by a resident of that town or by someone living in a neighbouring district.

The ratio between jobs with a fixed workplace in a municipality and residents of that municipality employed in a job with a fixed workplace tells us if there is a sufficient number of jobs to provide employment for all local residents if they all chose to work in their district. It gives a sense of the degree to which a given location would sustain its working population. This calculation excludes those individuals working in a job with no fixed workplace as well as those individuals working from home. Table 6 provides the data for all Algoma municipalities.

There are a few locations where Statistics Canada does not provide data, either because there is no figure for that column or because the figure is not reliable because of a low response rate to the census for that area. Under Place of Work Status, there was no data for: Rankin Location 15D; Goulais Bay 15A; and Algoma, Unorganized, South East Part. Under Local Jobs, these three localities did not have data, nor did the following: Hilton; Thessalon 12 IRI; Prince; Sagamok; and Gros Cap 49 IRI.

Among local jobs with a usual place of work, Sault Ste. Marie accounts for three-quarters (29,920 out of 38,825, or 77%) such jobs in Algoma, and around half (1,130 out of 2,180, or 52%) of the jobs of individuals working at home.

TABLE 6 - PLACE OF WORK DATA AND JOB LOCATION DATA, AWIC AREA AND ITS MUNICIPALITIES, AND ONTARIO, 2016

	PLACE OF WORK STATUS OF RESIDENTS				Local jobs excluding from home	RATIO: Jobs to usual place of work
	TOTAL – Place of Work Status	Worked at home	No fixed Workplace	Usual place of work		
ONTARIO	6,612,150	480,290	736,715	5,356,000	5,386,980	1.01
AWIC AREA	46,680	2,180	4,755	39,525	38,825	0.98
Jocelyn	145	20	35	80	20	0.25
Hilton	95	20	15	60	xxx	xxx
Hilton Beach	70	15	20	35	25	0.71
St. Joseph	495	70	130	295	120	0.41
Laird	505	40	60	395	30	0.08
Tarbutt and Tarbutt Additional	250	20	30	195	20	0.10
Johnson	310	95	35	180	225	1.25
Plummer Additional	300	70	40	185	40	0.22
Bruce Mines	205	20	30	145	210	1.45
Thessalon 12 IRI	55	0	10	40	xxx	xxx
Thessalon T	460	25	30	405	645	1.59
Huron Shores	590	70	70	440	210	0.48
Blind River	1,365	65	145	1,155	1,315	1.14
Spanish	215	20	35	155	70	0.45
The North Shore	170	0	15	150	170	1.13
Elliot Lake	3,100	155	360	2,580	2,405	0.93
Macdonald, Meredith and Aberdeen Additional	740	25	105	600	235	0.39
Sault Ste. Marie	31,665	1,130	2,885	27,490	29,920	1.09
Prince	445	10	60	365	xxx	xxx
Sagamok	295	10	55	225	xxx	xxx
Serpent River 7 IRI	115	10	10	100	40	0.40
Mississagi River 8 IRI	175	10	25	145	40	0.28
Garden River 14 IRI	375	15	55	290	235	0.81
Wawa	1,415	55	75	1,285	1,445	1.12
Gros Cap 49 IRI	30	0	0	25	xxx	xxx
Dubreuilville	275	0	20	255	380	1.49
White River	335	0	30	300	410	1.37
Algoma, Unorganized, North Part	2,495	185	380	1,925	445	0.23

Statistics Canada, 2016 Census

In Ontario, approximately 7% of employed residents work from home. The average for Algoma is 5%, although some communities have much higher proportions, such as: Johnson (31%); Plummer Additional (23%); and Hilton and Hilton Beach (each at 21% -- although the numbers are quite small here, and because of how StatCan randomly rounds their numbers under 20, the percentages may not quite be a true reflection of the real proportions). In Sault Ste. Marie, only 4% of employed residents work from home.

In Ontario, around 11% of residents work in jobs that have no fixed workplace. In Algoma, that average is 10%. Among localities with more than 200 employed residents, the following had higher proportions working in jobs that had no fixed workplace: St. Joseph (26%); Sagamok (19%); and Spanish (16%).

The ratio between the number of jobs with a fixed workplace and the number of residents working in a job with a fixed workplace (excluding individuals working from home), highlights which municipalities are local centres of employment. Among municipalities with more than 200 employed residents, the following had ratios greater than 1.00: Thessalon T (1.59); Dubreuilville (1.49); Bruce Mines (1.45); White River (1.37); Johnson (1.25); Hornepayne (1.15); Blind River (1.14); Wawa (1.12); and Sault Ste. Marie (1.09).

Local Jobs by Industry

In the following table, the percentage breakdown of jobs by industry is presented for the municipalities of Algoma. The top row of each table shows the actual number of jobs, with the percentage breakdown by industry underneath. Only those municipalities with at least 500 local jobs are represented.

Compared to the averages for Ontario, Algoma District (Table 7) has a considerably smaller proportion of jobs in the following industries: Wholesale Trade; Information & Cultural Industries; Finance & Insurance; Real Estate & Rental and Leasing; and Professional, Scientific & Technical Services. On the other hand, the District has higher proportions of jobs in: Mining & Oil and Gas Extraction; Retail Trade; Health Care & Social Assistance; Arts, Entertainment & Recreation; Accommodation & Food Services; and Public Administration. Each of the larger municipalities demonstrate different concentrations of industries, and the exceptions can appear larger when the total number of local jobs is rather small.

Thus, Agriculture, Forestry, Fishing and Farming are particularly pronounced in Thessalon and Algoma Unorganized, North Part, while Algoma's somewhat higher share of Mining & Oil and Gas Extraction is almost entirely driven by jobs in Wawa. Accommodation & Food Services and Construction accounts for a significant proportion of jobs in Algoma Unorganized, North Part, while Manufacturing is prominent in Thessalon and Sault Ste. Marie. Health Care & Social Assistance contribute large proportion of jobs almost everywhere except Algoma Unorganized, North Part. Public Administration jobs are a large component of the jobs found in Wawa. The larger share of Administrative & Support Services jobs in Sault Ste. Marie is a result of the telephone call centres located there.

TABLE 7 - LOCAL JOBS BY INDUSTRY, ALGOMA MUNICIPALITIES, 2016

	ONTARIO	AWIC AREA	Thessalon	Blind River	Elliot Lake	Sault Ste. Marie	Wawa	Algoma, Unorganized, North Part
TOTAL NUMBER OF JOBS	5867265	41,005	670	1,380	2,560	31,050	1,500	630
Agriculture, forestry, fishing, farming	1.5%	1.4%	3.0%	0.7%	1.2%	0.4%	2.0%	3.2%
Mining and oil and gas extraction	0.4%	1.5%	0.0%	1.4%	0.8%	0.3%	14.0%	0.0%
Utilities	0.7%	1.0%	4.5%	0.7%	0.0%	1.0%	2.0%	1.6%
Construction	3.6%	3.6%	0.0%	5.1%	3.1%	3.3%	4.7%	11.1%
Manufacturing	10.6%	10.4%	20.9%	10.1%	2.7%	11.6%	2.0%	4.8%
Wholesale trade	4.1%	1.8%	1.5%	0.0%	1.2%	1.8%	0.7%	1.6%
Retail trade	12.1%	13.9%	6.0%	14.5%	15.2%	14.3%	11.3%	15.9%
Transportation and warehousing	4.0%	3.3%	3.0%	2.9%	4.7%	3.1%	2.0%	4.8%
Information and cultural industries	2.6%	1.1%	1.5%	0.7%	1.2%	1.2%	0.7%	0.0%
Finance and insurance	6.1%	2.6%	6.0%	0.7%	1.6%	3.0%	2.0%	0.0%
Real estate and rental and leasing	2.1%	1.3%	0.0%	0.7%	2.0%	1.4%	0.0%	0.0%
Professional, scientific, technical	8.5%	3.3%	1.5%	1.4%	2.7%	3.5%	1.3%	4.8%
Management of companies	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Administrative and support	3.8%	4.7%	0.0%	2.9%	2.0%	5.6%	2.0%	1.6%
Educational services	7.9%	8.0%	4.5%	13.0%	7.4%	7.9%	10.7%	4.8%
Health care and social assistance	11.6%	17.6%	31.3%	21.7%	29.3%	17.5%	11.3%	4.8%
Arts, entertainment and recreation	2.0%	3.2%	1.5%	0.7%	0.8%	3.6%	0.7%	6.3%
Accommodation and food services	7.2%	9.0%	4.5%	11.6%	11.3%	8.5%	14.0%	23.8%
Other services	4.4%	4.0%	3.0%	4.3%	5.1%	3.9%	2.7%	6.3%
Public administration	6.6%	8.2%	4.5%	6.5%	7.0%	8.2%	14.7%	3.2%

Statistics Canada, 2016 Census

School Attendance Among Youth Aged 15 to 24 Years Old

One of the Census questions asks whether the person attended school in the previous nine months (at any time between September 2015 and May 10, 2016), and the type of school they attended. The data also provides their labour force status, meaning whether they are employed, unemployed or not in the labour force. This provides some useful insights: (1) when it comes to youth, it can explain whether lower labour force participation is as a result of staying in school longer, and it can also identify those youth who are not employed, in education or training (a category known as NEET); (2) it can also highlight the extent to which adults participate in continuing education and training.

The following table below compare the results by gender and by different age groups. In order to provide a context, it is useful to have a comparison point. However, Ontario numbers mask what are two different experiences, namely what happens in the Greater Toronto Area and what happens in the rest of Ontario.

To provide that appropriate comparison, a modified Greater Toronto Area figure has been created, representing the results for Toronto, York, Peel and Halton (Durham is actually much more reflective of the rest of Ontario); this modified GTA has very high school attendance and educational attainment figures (only the Ottawa Region matches their numbers). The Ontario averages are represented by the Ontario figures minus this modified GTA.

TABLE 8 - PERCENTAGE DISTRIBUTION OF SCHOOL ATTENDANCE, MALES AND FEMALES AGED 15-19 YEARS OLD, AWIC AREA AND ONTARIO MINUS PARTS OF THE GREATER TORONTO AREA, AND MODIFIED GTA, 2016

	MALES			FEMALES		
	AWIC AREA	ONTARIO MINUS GTA*	GTA*	AWIC AREA	ONTARIO MINUS GTA*	GTA*
Did not attend school	15%	15%	10%	10%	12%	8%
Yes, attended school	85%	85%	90%	90%	88%	92%
Elementary/secondary school	70%	68%	67%	69%	66%	66%
Tech/trade school or college	9%	8%	7%	10%	8%	6%
University	5%	9%	15%	11%	13%	20%
Two or more of the above	0%	0%	1%	1%	0%	1%

Statistics Canada, 2016 Census

GTA* refers to Toronto, York, Reel and Halton

The 15% of AWIC area males aged 15-19 years old who are not attending school matches the figure for Ontario minus the GTA. Among those males attending school, a higher proportion are still in elementary or secondary school, while a higher proportion than elsewhere are enrolled in technical school or college, whereas the figure for university attendance is considerably lower than the average for the rest of Ontario, and only a third of the 15% level for the modified GTA.

Among AWIC area females aged 15-19 years of age, the proportion not attending school is slightly lower than the average for the rest of Ontario. Like their male counterparts, they have a higher proportion who are still in elementary or secondary school or who are enrolled in technical school or college. Their university attendance is lower than the rest of Ontario or the modified GTA, but still double that for local males (11% compared to 5%).

TABLE 9 - PERCENTAGE DISTRIBUTION OF SCHOOL ATTENDANCE, MALES AND FEMALES AGED 20-24 YEARS OLD, AWIC AREA AND ONTARIO MINUS PARTS OF THE GREATER TORONTO AREA, AND MODIFIED GTA, 2016

	MALES			FEMALES		
	AWIC AREA	ONTARIO MINUS GTA*	GTA*	AWIC AREA	ONTARIO MINUS GTA*	GTA*
Did not attend school	55%	52%	40%	48%	45%	35%
Yes, attended school	45%	48%	60%	52%	55%	65%
Elementary/secondary school	5%	3%	3%	5%	3%	3%
Tech/trade school or college	23%	20%	19%	21%	19%	17%
University	17%	25%	36%	25%	33%	44%
Two or more of the above	1%	0%	1%	1%	0%	1%

Statistics Canada, 2016 Census

GTA* refers to Toronto, York, Reel and Halton

Among older youth, aged 20-24 years of age, the school attendance figures for both males and females in the AWIC area are lower than those for the rest of Ontario or for the modified GTA. The attendance figures for elementary or secondary school are higher, as are the figures for technical school or college. The university attendance levels are considerably lower than those for the rest of Ontario and much lower than the figures for the modified GTA. (Some of this would reflect the fact that Algoma youth may change residence to attend university elsewhere, although that is only a partial explanation.)

TABLE 10 - NUMBER AND PERCENT OF YOUTH NOT IN SCHOOL NOT EMPLOYED AND NOT LOOKING FOR WORK, BY AGE, GENDER AND LEVEL OF EDUCATIONAL ATTAINMENT, AWIC AREA, 2016

	15-19 YEARS OLD		20-24 YEARS OLD	
	MALES	FEMALES	MALES	FEMALES
NO HIGH SCHOOL DIPLOMA				
TOTAL Number	235	150	305	235
NEET Number	135	85	100	145
NEET Percent	57%	57%	33%	62%
HIGH SCHOOL DIPLOMA				
TOTAL Number	220	115	935	650
NEET Number	35	20	170	165
NEET Percent	16%	17%	18%	25%
APPRENTICESHIP, COLLEGE DIPLOMA OR UNIVERSITY DEGREE				
TOTAL Number			535	550
NEET Number			15	40
NEET Percent			3%	7%

Statistics Canada, 2016 Census

Table 11 reveals a number of insights:

- Over half of youth aged 15 to 19 years old who are not in school and have not obtained a high school diploma are not working; among those that age who have a high school diploma, 16-17% are not in the labour force (not working and not looking for work);
- Among youth aged 20 to 24 years of age who are not in school and who do not have a high school diploma, a third of the males are not working, while almost two-thirds of the females are not working (one possible explanation is that among the females, a certain proportion are raising children);
- Among the youth school drop-out population (that is, no educational certificate and not attending school), it is almost equally divided between those who are 15-19 years old (47%) and those who are 20-24 years old (53%);
- Among those youth aged 15-24 years old with a high school diploma, between 16-18% are not in the labour force, except for females aged 20-24 years old, who have a slightly higher figure of 25% (once again, child-rearing may be an explanation);
- Those youth aged 20-24 years old who have a post-secondary certificate are far less likely not to be in the labour force, with only 3% of males and 7% of females in that category.

School attendance among adults in the labour force

The school attendance data among adults aged 25 to 44 years of age reflects two population groups: those who have continued post-graduate education following their post-secondary degree, and those who have returned to school after some time to improve their labour market outcomes. Table 6 provides the data for the AWIC area by educational attainment levels and compares the results to residents of Toronto and to residents of the rest of Ontario minus Toronto. The population represents only those in the labour force (that is, either employed or actively looking for work; it does not include those who are enrolled full-time in education and not working or not looking for work).

TABLE 11 - SCHOOL ATTENDANCE AMONG ADULTS AGED 25 TO 44 YEARS OLD, BY GENDER AND BY EDUCATIONAL ATTAINMENT, FOR RESIDENTS IN THE LABOUR FORCE OF AWIC AREA, TORONTO AND ONTARIO MINUS TORONTO, 2016

	NO CERTIFICATE		HIGH SCHOOL DIPLOMA		POST-SECONDARY CERTIFICATE	
	MALES	FEMALES	MALES	FEMALES	MALES	FEMALES
AWIC AREA						
Number	35	35	140	170	550	650
% of total	5%	8%	5%	9%	9%	9%
TORONTO						
Number	980	845	7,265	5,760	36,070	48,455
% of total	4%	6%	11%	13%	14%	17%
ONTARIO MINUS TORONTO						
Number	2,970	2,445	19,890	15,350	83,970	107,390
% of total	3%	5%	7%	8%	11%	13%

Statistics Canada, 2016 Census

There are several evident trends:

- In every area and at each level of educational attainment, in all cases a higher proportion of females is engaged in further education than males (even though the AWIC area figures for males and females with a post-secondary degree appears tied at 9%, these are rounded off from 8.7% for males and 9.1% for females);
- In each area, the more previous education a person has, the more likely it is they will be pursuing further education; that being said, the increase from one level to another among AWIC area residents is far more muted – there is less difference between those with no certificate and those with a post-secondary degree compared to the figures for the rest of Ontario, and considerably less compared to the figures for Toronto;
- Residents of Toronto are more likely to be engaged in further education, followed by residents of the rest of Ontario; interestingly, AWIC area residents with no certificate engage in further education at a slightly higher percentage than these other areas, although the absolute numbers for the AWIC area are quite small (at 35 each for males and females).

UPDATE ON AWIC ACTION ITEMS

UPDATE ON AWIC ACTION ITEMS

Priority One - Provide Relevant and Current Labour Market Information

Monthly Online Job Postings Report	The report provides a monthly portrait of unoccupied positions in the District and helps assess the degree of labour shortages and demand within the labour market.	Ongoing
Labour Market Newsletter	Weekly roundup of Labour Market News that we think is relevant here in Algoma.	Ongoing
Supporting Local Projects	AWIC provides Labour Market data to a number of different groups throughout the region including IRCC Immigration Pilot applications in Sault Ste. Marie and White River.	Ongoing
Industry and Occupation Profiles for Algoma	Profiles provide an overview of the top Industries and Occupations in Algoma using local data. They are resource tools for students, job seekers and employment advisors.	Updated for 2018

Priority One - Provide Relevant and Current Labour Market Information

Manufacturing Day in Algoma	MFG DAY addresses common misperceptions about manufacturing by giving manufacturers an opportunity to open their doors and show, in a coordinated effort, what manufacturing is — and what it isn't. By working together during and after MFG DAY, manufacturers will begin to address the skilled labor shortage they face, connect with future generations, take charge of the public image of manufacturing, and ensure the ongoing prosperity of the whole industry.	Complete Fall 2018
Construction and Manufacturing Sector Surveys	The Construction and Manufacturing sectors are not only among the largest sectors of employment in Algoma, they are also among the fastest growing. This is creating opportunities for people looking to enter the workforce across the region. At the same time, gathering information directly from employers can be an issue and entry into the fields for individual involves specialized training and skill sets.	Surveys of employers in Manufacturing and Construction Sectors Final Report March 2019
Employer Workshops	Employers in Algoma are facing more and more labour market related challenges when it comes to finding and retaining staff. AWIC held workshops around the region to help employers to begin attraction, retention and talent management programs.	Winter 2019
Focus on Students	Develop information, presentation and activities for school guidance counsellors. Presentations have mainly focused on careers of the future and skills that are in demand. Guidance counsellors were also taken on tours of local manufacturers.	Ongoing

Priority Two (continued)

Youth Enterprise Camps	AWIC sponsored this camp which gives youth between the ages of 10 and 13 the opportunity to embark on a journey into the world of enterprise. Participants will recognize various qualities, characteristics and attitudes within themselves that can be related to entrepreneurship.	Complete
Dollars and Sense	AWIC is committed to providing relevant workforce information to employers in order to help individuals get the training, skills and experience to achieve their career goals. This guide is meant to show that there are many tax credits, wage incentives, programs and resources available to help employers make their workplaces more efficient, productive and cost effective.	February 2019

Priority Three – Strengthening Connections

Regional Presence	AWIC attends and hosts regular meetings in the Algoma region. The goal is to continually improve communication and coordination of projects and programs related to workforce development within each region and across the district.	Ongoing
Sponsorships	In 2012, AWIC introduced a sponsorship program to support non- profit organizations that hold events and activities that will have a positive effect on workforce development within the Algoma District.	Ongoing

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ALGOMA WORKFORCE INVESTMENT CORPORATION

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