Local Labour Market Plan
2021-2022

reports | studies | statistics

Local Labour Market Plan

2021-2022

MISSION STATEMENT

To coordinate identified education and training needs in order to generate opportunities for economic growth in the communities we serve.

MANDATE

The Board is active in the following labour market-related areas: labour market information and research; analysis and advice; planning; access and equity; and lifelong learning.

Workforce Planning for Sudbury & Manitoulin (WPSM) is one of 26 local planning boards in Ontario. Our mandate is to engage key partners across the Sudbury and Manitoulin Districts to address local labour market issues. Given our unique and neutral role, we bridge various labour market partners such as: business; labour; employment services; industry leaders; educators/trainers; economic development organizations; and others to identify and address current and projected workforce issues. This report, the Local Labour Market Plan (LLMP) 2021-2022, provides a foundation on which to build local policies, programs and services. It includes evidence-based research and data analysis, which is corroborated by key stakeholder meetings and consultations. Combined, this information contributes to planning, decision-making, partnerships, and action.

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

This project is funded in part by the Government of Canada and the Government of Ontario

This report was prepared by Reggie Caverson, Executive Director
Workforce Planning for Sudbury & Manitoulin

The views expressed in this document do not necessarily reflect those of the Government of Ontario. The material contained in this report is drawn from various sources. We make no representation or warranty, expressed or implied, as to its accuracy or completeness. In providing this material, WPSM does not assume any responsibility or liability. The assistance of Tom Zyzis for his data analysis expertise, Gwen Boyd, Translator and WPSM Administrative Assistant Colleen Johnson Malette are acknowledged for their contributions to this report. The WPSM Board of Directors and local Employment Ontario Services are also thanked for their insights.

Table of Contents

Shifts and Changes in the Labour Market	**3**
About this Report	**4**
Labour Market Information – Indicators	**5**

- Census Area
- Statistics Canada Data
- Other Data Sources

Greater Sudbury	**6**

- Number of Businesses by Employee Size Range
- Change in Number of Employers by Industry and by Firm Size

District of Manitoulin	**8**

- Number of Businesses by Employee Size Range
- Change in Number of Employers by Industry and by Firm Size

District of Sudbury	**10**

- Number of Businesses by Employee Size Range
- Change in Number of Employers by Industry and by Firm Size

Other LMI Data	**12**

- Top Five Industries
- Businesses with 200+ Employees
- Businesses with No Employees
- Active Businesses Greater Sudbury (June 2020 - June 2021)
- Change in Number of Businesses (June 2020 – June 2021)

Local Data Sources and Research	**14**

- COVID-19 Business Impact Surveys
- Jobs in Sudbury-Manitoulin Job Board
- Previous Research at WPSM

Employment Ontario (EO) Programs	**16**

- Background
- Employment Services (ES) Data
- Literacy and Basic Skills (LBS) Data
- Second Career (SC) Data
- Apprenticeship Data
- Workplace Grants and Incentives

EO Service Provider Consultations	**20**
What will the future hold?	**23**
Action Plan Update	**24**
Key Stakeholders & Resources	**27**
References & Other Sources	**28**

Shifts and Changes in the Labour Market

Saying our world has changed due to Covid-19 doesn't begin to do justice to the upheaval that has been caused in every part of our lives. Everyone has been impacted in one way or another. From the first time we heard the word pandemic to where we are now illustrates just how fragile our world really is and how connected and dependent we are on our global economy.

From a labour market perspective, we see supply chains that have been interrupted in ways we never imagined, the rapid integration of technology into every aspect of business and new demands coming from the workforce.

Although we may feel distant or disconnected from these larger labour market shifts, we aren't. Anyone who has tried to buy lumber, a new vehicle or find a contractor has felt the ramifications of lumber prices, micro-chip shortages or lack of labourers. Anyone who shops for groceries has been witness to the increase in price for many products and empty shelves for high-demand items. Anyone who has school-aged children has had to figure out ways to oversee schooling at home, assess risk of exposure once schools reopened and keep their children active while following public health guidelines.

But let's turn it back to our local economy, our local businesses and our local workforce.

After mandated provincial closures of local businesses, some employees who lost their jobs had little choice but to collect federal wage benefits. Others left their job and went on to find other employment. Even when the mandated closures lifted, some decided not to return to their previous job, some dropped out of the workforce and others looked for a job that would allow them to work from home. For years, most of these were not an option, but our priorities have shifted.

When the pandemic hit, many of the businesses we surveyed, temporarily closed their storefront, laid off staff and changed their business operations by creating a website presence, offering online orders and sales and providing curbside pickup. Unfortunately, some have permanently closed. Survey results are highlighted in this document and a report on each survey is available on our website.

Each industry, even those that were deemed essential have had to adapt their business operations. Like every business, everyone was required to comply with mandated public health guidelines, although many balked at first. Workers across all industries responded – they were scared to go to work for fear of getting COVID or bringing it home to loved ones. Employers continue to make efforts to find the right balance between the safety of their employees and still run their business.

Now some industries and some employers are finding it hard to find employees. Ask any restaurant, hotel or tourism operator. They simply can't find enough people to replace those they laid off prior to the pandemic.

And let's not forget some of the occupations that have been deeply impacted. Nothing can be more devastating than the physical and vicarious toll this pandemic has had on nurses, personal support workers, hospital staff, police officers, emergency response workers and other frontline workers. Each day, these frontline workers have not only been exposed to the risk of COVID as part of their job, but dealing with the additional impact in our communities: increased physical and mental health problems, opioid overdoses, family disruption and deaths.

This brings us back full circle to how deeply and intimately we are all connected in our own community, our own country and right across the globe. This pandemic is like a game of dominos; where one piece is connected to many others, but this is no game. It is real and it is a reality that we will be dealing with for some time to come.

Although we don't have a crystal ball to predict the future, our greatest strength is in our ability to be resilient and adapt. Economic recovery will take time, patience and perseverance as we still have a long way to go. Many of us are tired of zoom meetings, being isolated from friends, families and colleagues, and restricting activities that once formed part of our daily lives.

We know life will not be the same, but we have to find ways to forge ahead in our economy and ensure that everyone who can and wants to work has the opportunity to do so.

DATA OVERVIEW

WPSM BOARD AREA
Greater Sudbury
District of Manitoulin
District of Sudbury

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

Workforce data from the 2021 Census will not be available until late fall 2022. Current census data (2016) will not be used (out-of-date)

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

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

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

*****
more information at:
www.planningourworkforce.ca

About this Report

OVERVIEW

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

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

It is important to keep in mind however that COVID-19 has presented us with a significant challenge not only for this report, but for labour market research in general. Emerging trends, labour market expectations and planning based on traditional sources and models is less reliable. As a result, a cautionary approach will need to be taken to understand what jobs will be in demand, what impact technology will have and how businesses are adapting.

DEMAND SIDE

When examining the labour market, it is important to consider both the demand and supply side. The ***demand side*** includes industry changes, demand for certain occupations and skill sets as well as the needs of employers. Sometimes this is out of sync with the supply side and more recently we are seeing demand outstrip supply - in other words, there are not enough people to fill the needs of employers for a variety of reasons we will explore.

SUPPLY SIDE

Data from the ***supply side***, in other words, who is currently available to work is included. Sources include: reports produced by *Statistics Canada* and data from *Employment Ontario (EO)* which is funded by the Ministry of Labour, Training and Skills Development (MLTSD). As noted above, matching jobseekers with industry needs is complex. We have seen that expectations from the supply and the demand side are not always in sync with one another.

ACTIONS

This report also provides a brief summary and status update of the many labour market activities that WPSM currently supports in local communities and expected activities over the next few years. By no means does this represent the numerous efforts that are underway to develop and grow our workforce.

Labour Market Information - Indicators

CENSUS AREA

As one of Ontario's 26 workforce planning boards, WPSM is responsible for analyzing local LMI data for our area. This includes the following census areas: City of Greater Sudbury, the Districts of Sudbury and the District of Manitoulin.

STATISTICS CANADA DATA

CANADIAN BUSINESS COUNTS

A regular part of our annual review of labour market indicators includes profiling Statistics Canada's *Canadian Business Counts*, which reflects the number of business establishments in a community. Due to COVID, there has been an increased interest in how the number of business establishments has been affected. As a general rule, Statistics Canada recommends against using its semi-annual count of businesses as a longitudinal barometer of whether the number of businesses is growing or shrinking in a given community.

The analysis this year will continue to profile Canadian Business Counts numbers however, data from another Statistics Canada program, the *Experimental Estimates for Business Openings and Closures*, is included to provide another perspective.

STATISTICS CANADA STATEMENT:

"June 2021 counts cannot be used to measure the impacts of the COVID-19 pandemic. These figures continue to include most businesses that closed in the months since the crisis began. Those that close permanently will eventually cease to be included, once businesses wind-down and closeout procedures are completed and confirmed., which can take several months."

EXPERIMENTAL ESTIMATES FOR BUSINESS OPENINGS AND CLOSURES

These estimates are derived from the Business Register maintained by Statistics Canada and supplemented by Canada Revenue Agency payroll deduction files. While this data provides information on: business openings, business closures, active businesses, and continuing businesses, this information is not available for smaller geographies such as the Manitoulin of Sudbury Districts. Even for a smaller Census Metropolitan Area (CMA) such as Greater Sudbury, the data is not available for all industries, so only active businesses will be reported for a 3-year period.

DATA LIMITATIONS

As noted, Greater Sudbury is a designated CMA as the population is greater than 100,000 and some LMI data is available. When data for smaller population areas such as the Sudbury and Manitoulin Districts is dissected, the results become less reliable, because of how Statistics Canada presents the data. With datasets less than 10, data is randomly rounded to end with either "0" or "5" and as a result, is not as helpful in trying to understand labour market challenges in these areas.

OTHER DATA SOURCES

Other data sources in this report include data from: the COVID-19 business impact surveys; the WPSM job board; and Employment Ontario. This data is supplemented with anecdotal information from various stakeholders including: business associations, employers, unions, secondary and post-secondary leads, employment service providers, economic development officers, diversity groups and others.

Greater Sudbury

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 1 – GREATER SUDBURY NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE JUNE 2021										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	57	9	7	7	1	0	0	81	1	18
21 Mining	47	13	8	7	7	3	13	98	1	17
22 Utilities	9	3	4	0	1	1	0	18	0	19
23 Construction	552	257	105	62	54	15	9	1,054	9	3
31-33 Manufacturing	97	48	31	37	29	6	11	259	2	12
41 Wholesale Trade	112	67	58	63	32	10	6	348	3	10
44-45 Retail Trade	339	173	198	147	80	34	15	986	9	5
48-49 Transportation/Warehousing	198	40	19	17	13	9	3	299	3	11
51 Information and Cultural	72	31	11	7	6	6	0	133	1	15
52 Finance and Insurance	664	78	40	33	18	5	3	841	7	6
53 Real Estate, Rental, Leasing	2,560	185	29	20	17	1	1	2,813	25	1
54 Professional Scientific Tech	654	221	62	44	29	11	4	1,025	9	4
55 Management of Companies	127	7	5	2	5	1	1	148	1	14
56 Administrative Support	167	81	39	26	21	12	10	356	3	9
61 Educational Services	78	21	12	3	6	2	9	131	1	16
62 Health Care & Social Assist	609	311	97	92	58	17	22	1,206	11	2
71 Arts, Entertainment & Rec	118	35	11	13	9	3	3	192	2	13
72 Accommodation & Food	120	68	62	80	70	21	4	425	4	8
81 Other Services	409	253	101	43	29	3	3	841	7	6
91 Public Administration	0	1	1	1	0	2	1	6	0	20
CLASSIFIED BUSINESSES	6,989	1,902	900	704	485	162	118	11,260		
Percentage classified/unclassified	65	16	7	6	4	1	1	99		
Cumulative percentage	64	81	88	94	98	99	100			
ONTARIO % classified/unclassified	71%	17%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts June 2021
Highlighted cells: indicate the 3 largest industries (by number of businesses) for each employee-size category
Classified businesses are businesses for which the industry classification is known

CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 1a GREATER SUDBURY CHANGE IN THE NUMBER OF EMPLOYERS, BY INDUSTRY AND BY FIRM SIZE, JUNE 2020 TO JUNE 2021						
INDUSTRY SECTOR	Firm size (# of employees)					Total # of firms June 2021
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing and farming	-8	1	0	0	-7	81
Mining and oil and gas extraction	-13	3	2	-1	-9	98
Utilities	-1	0	0	0	-1	18
Construction	-18	-12	-7	0	-37	1,054
Manufacturing	2	4	-4	1	3	259
Wholesale trade	-6	3	-7	-1	-11	348
Retail trade	2	-8	-9	-1	-16	986
Transportation and warehousing	9	-11	0	0	-2	299
Information and cultural industries	-1	1	-3	-2	-5	133
Finance and insurance	-3	-2	0	0	-5	841
Real estate and rental and leasing	-64	8	-4	1	-59	2,813
Professional, scientific and technical services	8	-1	1	-1	7	1,025
Management of companies and enterprises	-4	-2	0	1	-5	148
Administrative and support	-6	-7	-3	1	-15	356
Educational services	-6	-1	-2	1	-8	131
Health care and social assistance	49	-3	-1	0	45	1,206
Arts, entertainment and recreation	8	-8	-1	0	-1	192
Accommodation and food services	16	2	-21	-2	-5	425
Other services	-28	5	-2	-1	-26	841
Public administration	0	1	-1	0	0	6
Total net changes 2020-2021	-64	-27	-62	-4	-157	11,260
Total net changes 2019-2020	-72	-20	14	-3	-81	
Total net changes 2018-2019	138	28	14	23	203	

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2021
Green indicates an increase in number of firms; red indicates a decrease; "0" indicates no change

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

In Greater Sudbury, the decline in the number of firms was more pronounced (Table 1a). Overall, there was a loss of 157 firms from 2020-2021, 93 of which had employees.

In 2019-2020, the net decline of firms with employees was nine, while in 2018-2019, this same category witnessed an increase of 65 firms. The net decline of firms with employees in Accommodation & Food Services was 21, while Construction saw a decline of 19 and Retail Trade a decline of 18.

District of Manitoulin

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 2 – MANITOULIN DISTRICT
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
JUNE 2021

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	108	12	0	2	0	0	0	122	12	3
21 Mining	4	0	0	0	0	0	0	4	0	20
22 Utilities	14	0	0	0	0	0	0	14	1	15
23 Construction	58	31	16	3	0	0	0	108	10	4
31-33 Manufacturing	12	8	4	3	1	0	0	28	3	12
41 Wholesale Trade	7	6	0	1	0	0	0	14	1	15
44-45 Retail Trade	57	29	26	10	5	3	0	130	12	1
48-49 Transportation/Warehousing	26	15	4	2	3	1	1	52	5	9
51 Information and Cultural	4	5	2	1	0	0	0	12	1	17
52 Finance and Insurance	22	10	5	0	0	0	0	37	4	10
53 Real Estate, Rental, Leasing	114	10	0	0	1	0	0	125	12	2
54 Professional Scientific Tech	55	22	2	1	0	2	0	82	8	6
55 Management of Companies	8	1	0	0	0	0	0	9	1	18
56 Administrative Support	13	11	4	1	0	3	0	32	3	11
61 Educational Services	3	3	2	0	0	0	1	9	1	18
62Health Care & Social Assist	23	14	6	8	7	4	2	64	6	8
71 Arts, Entertainment & Rec	13	6	1	1	0	0	0	21	2	13
72 Accommodation & Food	59	14	17	2	4	0	0	96	9	5
81 Other Services	43	25	7	2	0	3	0	80	8	7
91 Public Administration	0	0	1	2	6	5	2	16	2	14
CLASSIFIED BUSINESSES	643	222	97	39	27	21	6	1,055		
Percentage classified/unclassified	62	21	9	4	2	2	1	100		
Cumulative percentage	62	83	92	95	98	99	100			
ONTARIO % classified/unclassified	71%	17%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts June 2021
Highlighted cells: indicate the 3 largest industries (by number of businesses) for each employee-size category
Classified businesses are businesses for which the industry classification is known

CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 2a MANITOULIN DISTRICT CHANGE IN THE NUMBER OF EMPLOYERS, BY INDUSTRY AND BY FIRM SIZE, JUNE 2020 TO JUNE 2021						
INDUSTRY SECTOR	Firm size (# of employees)					Total # of firms June 2021
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing and farming	3	-6	0	0	-3	122
Mining and oil and gas extraction	1	-1	0	0	0	4
Utilities	0	-1	0	0	-1	14
Construction	-4	-7	0	0	-11	108
Manufacturing	-3	4	1	0	2	28
Wholesale trade	0	2	0	0	2	14
Retail trade	8	-5	0	0	3	130
Transportation and warehousing	-2	2	-1	0	-1	52
Information and cultural industries	0	-1	0	0	-1	12
Finance and insurance	-1	0	0	0	-1	37
Real estate and rental and leasing	18	1	0	0	19	125
Professional, scientific and technical services	6	-2	1	0	5	82
Management of companies and enterprises	0	0	0	0	0	9
Administrative and support	1	2	1	0	4	32
Educational services	-1	0	0	0	-1	9
Health care and social assistance	2	-3	1	-1	-1	64
Arts, entertainment and recreation	-5	1	-1	0	-5	21
Accommodation and food services	4	-10	-1	0	-7	96
Other services	-1	-2	-1	0	-4	80
Public administration	0	0	-1	0	-1	16
Total net changes 2020-2021	26	-26	-1	-1	-2	1,055
Total net changes 2019-2020	-31	2	-3	1	-31	
Total net changes 2018-2019	22	2	11	-2	33	

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2021
Green indicates an increase in number of firms; red indicates a decrease; "0" indicates no change

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

In 2020-2021, there was a decline of 28 firms with employees, while there was an increase of 26 firms with no employees, for a net loss of two (Table 2a). The overall impact would have been a loss of employment. In contrast to previous years, there has been a much larger decline among firms with employees. The highest number of losses among firms with employees were in: Accommodation & Food Services (minus 11); Construction (minus 7); Agriculture, Forestry, Fishing and Farming (minus 6); and Retail Trade (minus 5).

On the plus side, there were increases in firms with employees, notably in: Manufacturing (plus 5); and Administrative & Support Services (plus 3).

District of Sudbury

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

TABLE 3 SUDBURY DISTRICT NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE JUNE 2021										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	99	29	5	2	3	0	1	139	10	5
21 Mining	6	2	0	0	1	1	1	11	1	19
22 Utilities	10	0	1	1	0	0	0	12	1	18
23 Construction	85	51	14	10	4	0	0	164	11	2
31-33 Manufacturing	15	5	3	4	6	1	1	35	2	11
41 Wholesale Trade	16	4	1	0	2	0	0	23	2	14
44-45 Retail Trade	51	25	35	20	9	3	1	144	10	4
48-49 Transportation/Warehousing	46	20	5	1	3	1	1	77	5	8
51 Information and Cultural	6	6	3	2	0	0	0	17	1	16
52 Finance and Insurance	37	5	5	2	1	0	0	50	3	10
53 Real Estate, Rental, Leasing	211	20	3	2	1	0	0	237	16	1
54 Professional Scientific Tech	52	12	2	3	0	0	0	69	5	9
55 Management of Companies	9	0	0	0	0	0	0	9	1	20
56 Administrative Support	26	4	2	1	1	0	0	34	2	13
61 Educational Services	10	2	2	1	0	0	0	15	1	17
62Health Care & Social Assist	32	20	5	13	8	0	2	80	6	7
71 Arts, Entertainment & Rec	24	5	3	3	0	0	0	35	2	11
72 Accommodation & Food	88	29	13	9	4	3	0	146	10	3
81 Other Services	71	40	9	2	0	0	0	122	8	6
91 Public Administration	1	2	3	1	9	2	2	20	1	15
CLASSIFIED BUSINESSES	895	281	114	77	52	11	9	1,439		
Percentage classified/ unclassified	63	19	8	5	3	1	1	100		
Cumulative percentage	63	83	90	95	99	99	100			
ONTARIO % classified/unclassified	71%	17%	5%	3%	2%	1%	1%			

SOURCE: Statistics Canada, Canadian Business Counts June 2021
Highlighted cells: indicate the 3 largest industries (by number of businesses) for each employee-size category
Classified businesses are businesses for which the industry classification is known

CHANGE IN NUMBER OF EMPLOYERS BY INDUSTRY AND BY FIRM SIZE

TABLE 3a SUDBURY DISTRICT CHANGE IN THE NUMBER OF EMPLOYERS, BY INDUSTRY AND BY FIRM SIZE, JUNE 2020 TO JUNE 2021						
INDUSTRY SECTOR	Firm size (# of employees)					Total # of firms June 2021
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing and farming	11	-2	0	1	10	139
Mining and oil and gas extraction	3	0	1	-2	2	11
Utilities	1	0	0	0	1	12
Construction	-3	1	0	0	-2	164
Manufacturing	3	-1	-1	0	1	35
Wholesale trade	2	-1	0	0	1	23
Retail trade	-5	-2	-1	1	-7	144
Transportation and warehousing	1	-1	1	-1	0	77
Information and cultural industries	0	3	-1	0	2	17
Finance and insurance	-4	2	-2	0	-4	50
Real estate and rental and leasing	13	0	-1	0	12	237
Professional, scientific and technical services	2	-1	-1	0	0	69
Management of companies and enterprises	1	0	0	0	1	9
Administrative and support	0	-4	-1	0	-5	34
Educational services	-1	1	0	0	0	15
Health care and social assistance	6	-2	-1	0	3	80
Arts, entertainment and recreation	6	-1	0	0	5	35
Accommodation and food services	16	-16	-3	0	-3	146
Other services	4	-5	0	0	-1	122
Public administration	1	-2	0	0	-1	20
Total net changes 2020-2021	57	-31	-10	-1	15	1,439
Total net changes 2019-2020	-51	-10	4	-3	-60	
Total net changes 2018-2019	16	21	6	0	43	

SOURCE: Statistics Canada, Canadian Business Counts, June 2018 – June 2021
Green indicates an increase in number of firms; red indicates a decrease; "0" indicates no change

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

In terms of overall outcomes, changes in the Sudbury District were similar to those experienced in the Manitoulin District, with a net decline of 42 firms with employees and a net increase of 57 firms with no employees (Table 3a). This was in contrast to the net results for 2018-2019, when there was an increase of 27 firms with employees.

The industry with the biggest decline was again Accommodation & Food Services, with 19 fewer firms with employees. Among other industries, there were considerably smaller declines or the outcomes were mixed, with declines in some categories and an increase in others. Administrative and Support Services, as well as Other Services, experienced a decline of five firms among those with employees.

Other LMI Data

TOP FIVE INDUSTRIES (by number of businesses)

As illustrated in Table 4, Greater Sudbury has four of the same top five industries by number of employers as Ontario (excluding Transportation & Warehousing), although in a different ranking. Manitoulin and Sudbury both count Agriculture, Forestry, Fishing & Farming as well as Accommodation & Food Services in their top five, as opposed to Professional, Scientific & Technical Services, and Health Care & Social Assistance, which are on the list for Greater Sudbury. In each of these areas, the top five industries account for at least 55% of all businesses.

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

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

BUSINESS WITH 200+ EMPLOYEES

GREATER SUDBURY: There are 17 establishments with over 500 employees and 35 establishments with 200-499 employees. Among establishments with 500+ employees, there are: 7 businesses in the Educational Services sector (4 elementary and secondary schools; 2 representing community colleges and one university); 4 in Mining & Oil and Gas Extraction (all nickel-copper ore mining firms); 2 in Administrative & Support (janitorial services); and the other 4 consist of an industrial building and structure construction firm; a non-ferrous metal smelting and refining firm; a general hospital; and the regional government. Some of the larger clusters among establishments with 200-499 employees include: 8 firms in Health Care & Social Assistance; 6 in Mining & Oil and Gas Extraction; 4 in Retail Trade; and 4 in Administrative & Support Services (3 temp help services and one telephone call centre).

MANITOULIN DISTRICT: There are 2 businesses with 200-499 employees (a general freight long-distance trucking firm and one aboriginal band council).

SUDBURY DISTRICT: Among businesses with 200-499 employees, there are 4: one nickel-copper ore mining firm, a general hospital, an individual and family social service and a band council.

BUSINESSES WITH NO EMPLOYEES

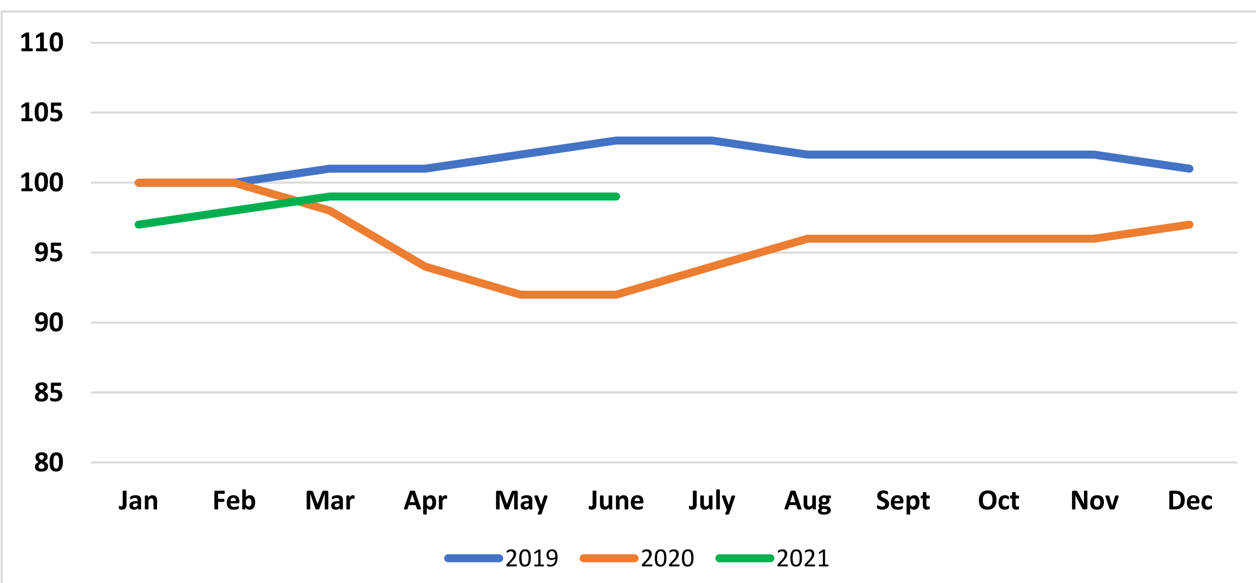
Another feature of these business profiles to note is that certain industries have very high proportions of solo operators. While on average, 60-64% of businesses across the three areas have no employees, Table 5 illustrates the industries with a particularly high proportion of businesses with no employees.

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

Manitoulin District 50+ businesses/no employees	Sudbury District 50+ businesses/no employees	Greater Sudbury 200+ businesses/no employees
Agri, Forestry, Fishing, Farming	Agri, Forestry, Fishing, Farming	Construction
Construction	Construction	Retail Trade
Retail Trade	Retail Trade	Transportation/Warehousing
Real Estate, Rental, Leasing	Real Estate, Rental, Leasing	Finance & Administration
Professional, Scientific, Technical	Professional, Scientific, Technical	Real Estate, Rental, Leasing
Accommodation & Food Services	Accommodation & Food Services	Professional, Scientific, Technical
-	Other Services	Healthcare & Social Assistance

ACTIVE BUSINESSES, GREATER SUDBURY (June 2019 – June 2021)

As noted in the *Experimental Estimates for Business Openings and Closures*, monthly data is provided for three years, to show the typical pattern in 2019, the impact of the pandemic in 2020, continuing with the ensuing recovery into 2021. Data is available up to June 2021 and the data is seasonally adjusted, which means that the data has been adjusted to avoid changes due entirely to seasonal fluctuations. All data is expressed in relation to the number of businesses active in January 2019.



SOURCE: Statistics Canada, Table 33-10-0270-01

CHANGE IN NUMBER OF BUSINESSES (June 2019-June 2021)

As noted in the introduction and in the section above based on *Experimental Estimates for Business Openings and Closures,* Table 6 is taken from *Canadian Business Counts* data and illustrates the change in the total number of businesses for each census area. Again, this is based on a count of businesses each June and could change as businesses close or in some cases, new ones open.

TABLE 6: TOTAL NUMBER OF BUSINESSES IN EACH CENSUS AREA BY YEAR (June 2019 – June 2020 – June 2021)			
CENSUS AREA	**June 2019**	**June 2020**	**June 2021**
Greater Sudbury	**11,498**	**11,417**	**11,260**
District of Sudbury	**1,484**	**1,424**	**1,439**
District of Manitoulin	**1,088**	**1,057**	**1,055**

Local Data Sources and Research

COVID - 19 BUSINESS IMPACT SURVEYS

National and provincial-level statistics seldom capture the local story. To assess how local businesses have navigated the pandemic, WPSM, the City of Greater Sudbury and Greater Sudbury Chamber of Commerce conducted a series of COVID-19 Business Impact surveys of businesses in Greater Sudbury and the Districts of Sudbury and Manitoulin.

The first series of business impact surveys were conducted in April, May and June of 2020, shortly after the pandemic hit. A new survey was conducted in the spring of 2021 and local businesses were once again asked about: revenue loss and viability, changes to business operations, impact on employees, and use of government supports. They were also asked their opinion on the provincial government's pandemic response and where staff will work once restrictions are lifted.

Close to 350 local employers responded to the spring 2021 survey. Interestingly the results were very similar to the previous year where approximately 20% of respondents reported being at high risk for closure; 43% reported changes to their business operations (reduced hours and staff, remote work); 17% said their business had increased; and 80% expected to remain viable. Slightly less than 50% said they were not happy with the provincial government's framework. The slow pace of the vaccine roll-out, the lack of regional travel restrictions and on/off again mandated closures were some of the reasons cited. A final question regarding working arrangements post-pandemic yielded a mix of responses. Forty-six percent of businesses said this question did not apply to their operations; 27% expect all employees to return to the workplace; but the remainder said they will stay remote, be flexible or stagger staff in and out.

Anecdotally, working arrangements/location is becoming a serious dilemma for some job-seekers and employers. We understand that some employees who were laid off are leaving their employment all together, have retrained for another job and some want to stay working at home. This will be an interesting development to keep an eye on for the next few years. Will employers be willing to accommodate staff, increase wages to reflect inflation or run the risk of losing them completely?

JOBS IN SUDBURY-MANITOULIN JOB BOARD

In April 2021, WPSM launched the *Jobs in Sudbury Manitoulin* Job board based on a model developed by the Windsor-Essex Workforce Planning Board. *Jobs in Sudbury-Manitoulin* not only provides a user friendly job board based on a collection of over 25 online job posting sites plus several large local employers, but is updated daily and can be searched by industry, location, occupation or other parameters (tags).

WPSM will be embarking on a campaign to promote *Jobs in Sudbury-Manitoulin*, but even without a planned media campaign, from data collected thus far, here is how the data is unfolding: there are approximately 4,000 active job posts each month; 2,500 of those are new jobs; 1,300 employers post jobs each month; 90% of jobs posted are located in Greater Sudbury; 85% of jobs posted are fulltime; and 87% of jobs are permanent. The three most in-demand occupations fall into the following sectors: sales and service; trades, transport and equipment operators; and business, finance and administration.

Two important things to note: a) employer surveys conducted pre-COVID-19 showed that many employers used *word of mouth* as their main recruitment strategy – we do not know how many have pivoted to using online job postings; and b) at this time, we are not able to determine how many jobs that are posted are filled or if they are a repeat job posting that has not yet been filled.

We continue to hear that employers are having a hard time finding suitable employees. While the pandemic has influenced the supply side, some suggest that there has been a shift in the employer-employee dynamic and that there are actually enough workers if employers would provide decent wages; wages that at a minimum match cost of living increases and inflation.

PREVIOUS RESEARCH AT WPSM

Although the following research was reported in the previous LLMP, it is important to note that information from these two WPSM-led research projects continues to be useful and used by various local and provincial stakeholders and industry sector leads. Both reports are available on the WPSM website.

PSW WORKFORCE SURVEY:

As noted in last year's LLMP, PSWs were an overlooked occupation and in some ways still are. While the pandemic's devastating impact in the long-term care and home-care systems contributed to untold illness and death, the PSW has been at the heart of trying to provide the care needed to clients/residents in those homes under significant duress. Unfortunately, in an effort to minimize the spread of COVID-19, some PSWs found themselves in an even more precarious situation where they were not allowed to work in more than one home. For those who were part-time and relied on two jobs, this only compounded matters.

Various organizations have used data from the above survey. Additional research by some unions continues to confirm challenges faced by PSWs: they are overworked, underpaid and undervalued. These same organizations are working hard to find ways to mitigate some of these challenges by addressing the need for a regulatory body; better working conditions; increased capacity; and increased wages, benefits and hours. Efforts are also underway to attract, train and retain more PSWs.

While changes are slow at moving forward, there is a long way to go to acknowledge, value, and properly compensate PSWs for the work they do each day. Increasing the amount of time per resident/client as mandated by the provincial government will also help not only PSWs in the work that they do but those who are in their care. How newly mandated vaccine requirements will impact in the future, is hard to say, especially when trying to balance all of these issues at a time when PSWs are needed most.

ICT/HIGH-TECH SECTOR:

In our previous local labour report, we identified the shift that was already occurring with our increasing reliance on technology and the rapid change in workforce demand and new skills. With the pandemic, this appears to be happening at an even more significant rate than our data showed previously or that we could have possibly imagined. Again, the pandemic has set in motion a rapid shift in demand for various skills related to the ICT (information communications and technology) and High/tech sectors. While this shift is unfolding, we are now seeing the growing use of AI (Artificial Intelligence); ML (Machine Learning); Cloud-based technologies; Robotics; and other technologies.

EO DATA (2020-2021)

DATA LIMITATIONS

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

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

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

Client numbers are driven by program requirements and MLTSD funding.

*****

GEOGRAPHIC AREAS

Greater Sudbury
Manitoulin District
Sudbury District

*****

PLEASE NOTE: given that COVID-19 has had an impact on demand and access to employment services, in most cases, year-to-year data comparisons will not be made in this section.

Employment Ontario (EO) Programs and Services

BACKGROUND

Data for this section is provided to WPSM by the Employment Ontario (EO) branch of the Ministry of Labour Training and Skills Development (MLTSD). It includes data from April 2020 - March 2021 for the following programs: Employment Services; Literacy and Basic Skills; Second Career; and Apprenticeships.

In most cases, year-to-year data will not be compared for two reasons: a) funding criteria may have varied from the previous year which in turn impacts program delivery and outcomes, and b) ongoing COVID-19 restrictions related to mitigating pandemic spread has significantly impacted on the ability of EO to continue to offer their full suite of services and has limited direct client interactions.

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

EMPLOYMENT SERVICES (ES) DATA

Employment Services offer a range of employment-related services to assist clients with finding a job. Each location across the WPSM catchment area also houses a resource centre where jobseekers can normally drop in and receive assistance with resumes, online job applications, various government forms and access job boards, computers, job search sites, and other resources. ES data includes the number of individuals who register as a client and a count of *unassisted* clients who do not register as a client but use ES services. These individuals are designated as R & I (resource and information) clients.

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

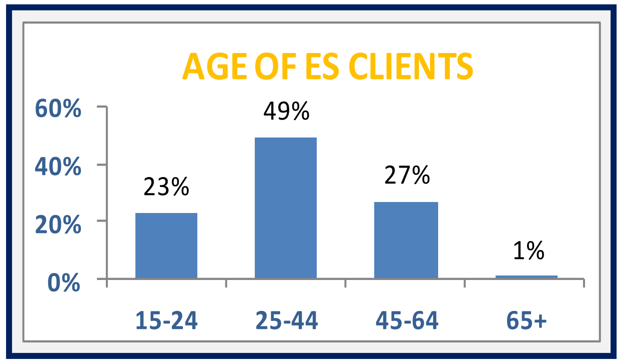
ES CLIENTS SERVED

As expected, given the ongoing impact of the pandemic, the number of direct service clients decreased from 3,346 to 2,010 during this reporting period. Additionally, since ES providers were required to close their storefront and have staff work from home, the ability to support “unassisted” R & I clients was also significantly hampered resulting in approximately one half the numbers of clients using this service from the previous year.

Although it should go without saying, these are not typical times and ES providers have taken enormous strides to try to adapt and find creative ways to support clients who require their services. Despite the challenges, ES providers in the WPSM area still managed to serve 6,444 clients (assisted and R & I combined)...not a small feat considering the ongoing pandemic and public health restrictions. Will numbers revert back to pre-COVID levels once the pandemic subsides? No one knows.

ES CLIENTS BY AGE GROUP

Even though the total number of clients that were served is down for this reporting period due to pandemic restrictions, the age of clients and the percentage they represent of overall clients shifted very little. All percentage figures have remained relatively stable. It is worth noting however, that during the consultations with ES providers, they indicated that there were some small differences in age of ES clients across geographic area served.



ES CLIENTS BY GENDER

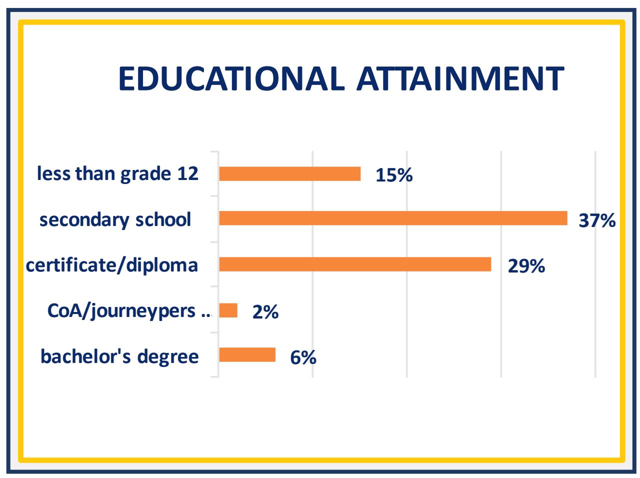
Across Ontario, more ES clients are self-identifying as *transgender* which has changed the male/female split that was quite even in previous years. In the WPSM area, none of the ES clients identified as *transgender* and no one chose the category of "*other*" or "*prefer not to disclose*." The ratio of male to female clients has remained quite stable in the WPSM area, and represented only a slight shift from the previous year. For this reporting period, 55% of ES clients were male and 45% were female.

ES CLIENTS BY EDUCATIONAL ATTAINMENT

Lower education levels result in higher levels of unemployment and underemployment. In the WPSM area, 52% of all ES clients only have a secondary school diploma or less. Along with low academic levels, many of these same clients also have other barriers to employment.

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

While educational attainment of ES clients across the WPSM area is similar to northern Ontario, only 2% of ES clients in the WPSM area have a university degree.



ES CLIENTS BY DESIGNATED GROUPS

Clients that register with ES are asked if they want to self-identify that they belong to a designated group. From the 2,010 people that registered as an ES client in 2020-21: 14% identified as Aboriginal; 21% as Francophone; 5% as Internationally Trained Professionals; 6% as Newcomers; 13% as a Person with a Disability; and 3% as Racialized. In other words, 62% identified with one of the designated groups as listed by MLTSD. This is an important factor in providing services that are responsive to diverse populations.

ES CLIENTS BY OUTCOMES AT EXIT

Employment Services are expected to meet a quota regarding ES clients who exited ES services to employment, education, and/or training. Outcomes at exit for ES clients for 2020-21 are as follows: 62% exited to employment (full-time; part-time; as an apprentice; self employed); of those that became employed, 12% exited to a more suitable job or in an area of training/choice and 2% became self-employed; 18% exited to education/training; and 7% remained unemployed. All others fell into the following categories: *independent; unable to work; volunteer;* or *unknown.*

LITERACY AND BASIC SKILLS (LBS) DATA

According to the Ministry's website, "*Literacy and Basic Skills programs help adults in Ontario to develop and apply communication, numeracy, interpersonal and digital skills to achieve their goals. The LBS program serves learners who have goals to successfully transition to employment, postsecondary, apprenticeship, secondary school, and increased independence. The program includes learners who may have a range of barriers to learning.*" More can be found at: MLTSD LBS.

The total number of learners for 2020-21 for the WPSM area was 1,278 (this includes new and carry-over in-person e-channel learners). For this reporting period there was a percentage increase in the number of clients who are women. Sixty-six percent of clients were women and 33% were men.

In terms of age of LBS clients in the WPSM area: 32% were 15-24 years of age; 47% were 25-44 years of age; 18% were 45-65 years of age; and 3% were 65 and older. This closely mirrors the percentage age breakdown for previous years.

During intake, LBS clients are also asked about their *Learner Goal Path.* In other words, why are they using LBS services? WPSM area clients reported the following reasons: 41% for post-secondary; 18% for employment; 10% for independence; 3% for an apprenticeship; and 24% to obtain a high school credit. Again, it is important to point out that a high school diploma is a necessary prerequisite for many occupations and/or training programs including the skilled trades. This percentage breakdown is similar to the previous year for *Learner Goal Path* except for apprenticeship which did decline. However, this may be due to pandemic restrictions on apprentices in both school and the workplace. Exam centres to write the C of Q (Certificate of Qualification – to become a journeyperson) exam were also closed.

SECOND CAREER (SC) DATA

The Second Career program is for laid-off unemployed workers. The intent is to provide skills training to transition these people into high-skill, demand occupations in the local area. More information can be found by going to: MLTSD Second Career

Over the last several years, the number of SC clients in the WPSM area has been declining and in 2020-21, there were 148 clients. Similar to previous years, most clients were male (65%), between the ages of 25-44 (62%), and been out of employment/training for less than 3 months (49%). Second Career is focussed on occupations in demand. Transport truck driver continues to be in demand with 61 clients being approved for a skills training program. Overall however, only 30% of SC clients went on to employment when they exited the program and 34% remained unemployed.

Given the impact of pandemic-related job losses, the ministry is making significant changes to the Second Career program and will be expanding eligibility to provide additional training opportunities to a much wider audience. For more information on these eligibility changes, go to: Second Career changes.

APPRENTICESHIP DATA

As noted in previous Local Labour Market reports and other WPSM research, concerns about the number of new entrants into the skilled trades is not new. Previous reports have highlighted issues related to the apprenticeship system as a whole. These include low enrollment rates in various trades-related programs, the low number of employers who hire apprentices and the aging demographic of current journeypersons across many trades. Although greater attention is being paid to the need to train and recruit more apprentices across most trades, many of the challenges that have been highlighted over the years continue to persist.

NEW & ACTIVE APPRENTICES (2019-2021)			
	WPSM	NORTH	ON
New 2019-2020	752	2,065	26,771
Active 2019-2020	1,856	5,462	73,924
New 2020-2021	484	1,264	16,730
Active 2020-2021	2008	5,819	78,733

For an apprentice to become a journeyperson, it takes years of practical hands-on experience under a trained and experienced journeyperson, several levels of in-school learning and the successful completion of a trades' qualifying exam known as the Certificate of Qualification.

With the onset of COVID-19, various restrictions were placed on in-school learning, hands on training and the closure of exam writing centres. As one can see from the data, there was a significant decline in the number of new apprentices and an increase in the number of active apprentices, the latter of which is likely attributed to some of these restrictions and an inability to complete all requirements to become a journeyperson.

NEW APPRENTICE REGISTRATIONS 2020-21	
SKILLED TRADE	#
Heavy duty equipment technician	80
Industrial mechanic millwright	52
Electrician/construction & maintenance	45
Automotive service technician	37
Powerline technician	36
General Carpenter	30
Truck & coach technician	27
Plumber	28
Industrial electrician	25
Child development practitioner	16
Sheet metal worker	12
Hairstylist	12

New apprentices generally entered the same trades but with much lower number than previous years. Part of this is also driven by what trade level training is being offered at any given time. Some apprentices may be required to leave their home community and their job for a short period of time (for block training) to complete a specific level of training for their trade. Again this is dependent on what is being offered locally.

Additionally, there are ongoing changes at the provincial government level to "modernize" the apprenticeship system. This term has been loosely thrown around for several years now. The former Ontario College of Trades is officially closed and is being replaced by Skilled Trades Ontario but at the time of writing this report, it is still unclear who will be responsible for apprentice registrations, oversight, regulations, exams, etc.

Another important note: there is some discussion in Ontario about offering micro-credential training for some trades; training that could be offered for specific skills within a trade. This means that if someone does not want to become an apprentice, they could develop skills to do a specific task as part of the trade. Since all trades have different skill sets that are required to become a journeyperson, there are many who oppose this idea as it diminishes the experience and skills a journeyperson brings. This includes overall safety and accountability. However, not all trades are created equal and some are not opposed to this idea.

WORKPLACE GRANTS AND INCENTIVES

Funding opportunities, incentives, training grants and wage subsidies available through Employment Ontario change from year to year, so it is best to check the website to see what is available and how to access them. Grants such as the Canada Ontario Job Grant (COJG) have been offered for several years and provide direct financial support to all businesses who want to purchase training for their staff. During 2020-21, 55 employers took advantage of this grant. Other programs such as Youth Job Connection are focussed on youth. Last year, the Youth Job Connection and Youth Job Connection Summer helped 228 local youth.

EO service provider consultations

While evidence-based data is important, it only tells part of the story. Each year, the ministry asks workforce planning boards to engage in consultations with local EO managers and ES providers since they work directly with clients looking for work and employers looking for workers. Their knowledge, insights, experience and on-the ground perspective is invaluable. It supplements data that WPSM collects and analyzes and helps us better understand current/emerging workforce trends, issues and challenges.

Due to restricted public health guidelines as a result of the pandemic, ES providers have made significant adaptations to their service delivery model to meet the needs of their clients. This is a critical aspect of EO services; to help clients with the supports they need, some of which has been compounded by business closures, lay-offs and uncertainty.

The following are some of the responses to a list of questions that were asked during the consultations with four local EO employment services. It is important to note that while each is mandated to deliver the same services, there are variations in their response due to their geography, industry profile, clientele and funding allocations received from MLTSD.

1. EO EMPLOYMENT SERVICES

IMPACT ON AGENCY AND STAFF

- pre-COVID, 80% of client interactions were in person
- with COVID restrictions, staff only meet with clients by appointment; these are clients who require far more direct services and benefit from in-person supports
- when allowed in the office, the number of staff in the office at one time is limited (rotating in/out)
- doors continue to be closed to the public
- in some services, staff are required to be fully vaccinated
- most are meeting with clients who are double-vaccinated
- some services are having difficulty hiring their own staff
- screening protocols are in place

IMPACT/CHANGE IN SERVICES

- ES agencies and providers did not cancel any services; continued to offer a wide-range of services, but have adapted to other service delivery models such as offering virtual services (including use of zoom), or use of email or by phone
- additional supports were provided to clients who do not have resources (internet or computer) - one agency purchased laptops and “hot spots” to loan to clients to access training
- some clients are responding better to one-on-one phone calls (don’t need to come in)
- virtual intake is working better for clients with children at home; less transportation worries
- provide “curbside” services for documents that require signatures, photocopies, resumes, faxing
- are respectful and non-judgemental of clients who have not been fully vaccinated
- no longer hosting group workshops (minimal client interest)
- virtual job fairs have been successful
- once the pandemic subsides, plan to continue to offer online and phone services as some clients respond better to these delivery options, yet others prefer in-person
- encouraged use of other online training programs (such as *Linkedin Learning)*
- COJG requests rebounding from previous year and as a result, COJG funding for the fiscal exhausted before the end of the calendar year
- needed to cancel daycare program and training due to lack of client interest
- one ES agency increased use of social media to promote programs and services

2. CONTINUING IMPACT ON CLIENTS

MENTAL HEALTH ISSUES AND ONGOING FEAR

- even though online mental health services have increased, mental health issues, including anxiety, escalated for many clients
- ongoing fear about going to work, potential exposure and children going to school
- some afraid to return to work (fear of public transportation, risk of exposure, personal safety)
- some clients on LBS who have multiple challenges better served in person (not virtually)
- many jobs are entry level and for frontline workers; clients don't want the risk of exposure

IMPACT OF CERB

- CERB (the Canada Emergency Response Benefit) was viewed as necessary to help laid-off workers due to provincially mandated closures...however, many low-waged workers who qualified for CERB did not want to go back to low-wage jobs and employers were not paying enough to attract them
- some left their current employment, took training and/or moved on to other jobs
- less pressure on some clients to find work

ACCESS TO TECHNOLOGY AND DIGITAL LITERACY

- technology has saved the day but not for those without access to it
- hard to empower those who have no access
- unsure how many clients are not reaching out for assistance as they have no access to technology making them further removed from the labour market

ONGOING SYSTEMIC ISSUES

- concerns about clients on Ontario Works (OW) and that many clients have less than Grade 12
- OW will pay childcare supports if client is in school/training but not if it is online
- wrap around supports are not available everywhere
- in-person clients tend to be youth (some who are less inclined to be vaccinated) and persons with disabilities
- some clients received their first vaccine but did not go for their second
- more older adults looking for work
- concern re: older adults who have limited pension and need to work as they do not have enough to live on – sadly one ES provider said it well – client said "I need to work until I die"
- childcare and transportation continue to be an issue
- lack of affordable housing and lack of access to food as some food banks closed
- difficulty getting a driver's licence and challenges with closed testing centres
- challenges when employer requires a physician note when sick
- mental health issues and the opioid crisis
- in some areas, such as Manitoulin, less youth looking for work
- becoming more difficult to find work for those who have not been double-vaccinated
- lack of access to internet due to cost or lack of service due to remote locations is still a problem

NEW CAREER

- more clients want to work from home
- a mix of interest in training/retraining

WOMEN

- women with children were significantly impacted by job lay-offs and lack of childcare
- some women chose to stay home with their children
- in some cases, women are returning to the workplace after years of raising children and just need a bit of training (i.e. being a cashier) but some employers were initially unwilling to do this
- research is showing that women have lost stride and are now about 10 years behind in the job market due to COVID

- increase in number of women wanting to start their own business

IMMIGRANTS, REFUGEES AND INTERNATIONALLY TRAINED WORKERS

- ES not always able to find employment for clients; i.e. internationally trained pharmacists
- once refugees qualify, they are leaning towards becoming a PSW
- vaccine received in other countries may not meet Canadian requirements
- immigration status is important as some don't qualify for ES and other supports
- some willing to volunteer to get Canadian experience but challenges with COVID restrictions

OTHER:

- initial impact of COVID resulted in more highly-skilled and educated clients looking for work, but there has been a shift back to clients who have been unemployed for a period of time
- great jobs out there but can't find people

3. INDUSTRY-EMPLOYER TRENDS

HIRING DEMAND:

- AZ-DZ truck drivers: some employers dropping their requirements as they are desperate for drivers; hard for truck drivers to get their licence; backlog in driver testing; insurance companies want drivers with experience
- ongoing shortage of skilled trades workers in some trades (not all)
- Early Childhood Educator (ECE) shortage; employers willing to take people with grade 12 as long as they have the required number of ECEs on site
- can't fill Social Service worker positions caused by burnout and some employers willing to hire those less qualified to do the job – this is however leading to long wait lists for people seeking social service assistance and in some cases, results in poor quality service
- hiring more PSWs in hospitals and homecare
- industry demand: office assistants, food service, retail, Personal Support Workers (PSW), travel agents, carpenters, general construction labourers, hospitality, kitchen helpers, cooks, cashiers, daycare workers, specialized welders, delivery drivers, security personnel, school bus drivers

EMPLOYER EXPERIENCES/TRENDS:

- employers note that vaccine hesitancy by some workers is causing issues
- some may consider dropping their vaccine mandates as they cannot find enough suitable workers
- some employers are frustrated and desperate, but feel people are no longer desperate to work
- concern re: how various government assistance programs are impacting on willingness to work
- trainees in construction recruited immediately due to demand
- some workers who are hired and/or promoted are becoming overwhelmed as they are not properly trained/prepared and don't have the right skill sets
- employers are moving some employees into more senior positions; know how they work and their loyalty to the company
- more employers offering one-on-one training if person does not have experience
- lack of housing and transportation prevent people from relocating
- more fulltime and permanent jobs
- traditional retail jobs may not exist in future – for example, increased move to self-checkout
- unable to fill vacancies in minimum-wage jobs
- due to initial COVID layoffs, some employees found other jobs and are no longer available
- job offers made but are not accepted or person is a "no show"
- increase in employers doing training (through COJG funding) with staff that can be done online i.e. health and safety, project management and driver training educational courses
- some are now offering signing bonuses

What will the future hold?

What will the future hold in the world of work? We have been asked this question numerous times. All we can do is take a deeper look at the changing trends that we are seeing because our traditional modelling, while useful, can't keep up with the pace of all that has changed.

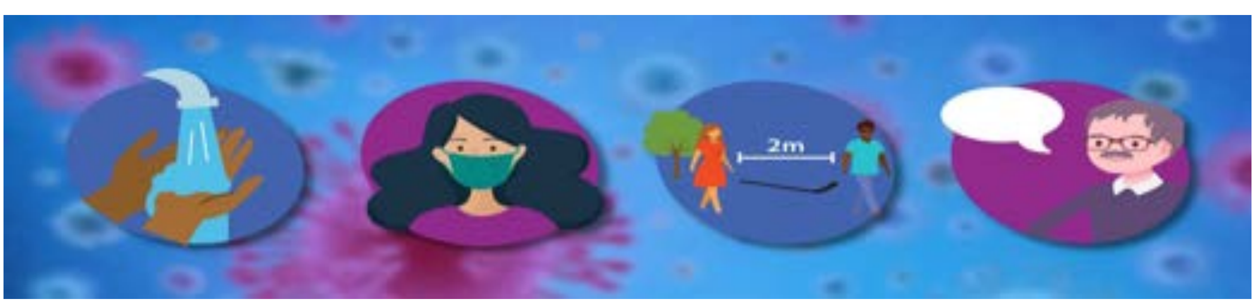
Has COVID done this? Yes and no. As previously noted, COVID certainly did speed up things that were already happening around us in our personal lives and in industries and businesses across the world. Things like online shopping and apps for our phones to do everything from turning on our lights, to ordering take-out, to booking a trip, to looking for work. Cell phones were already becoming our primary means for communication and information either through more traditional phone calls, to texting, face-time and surfing the net. On the business and industry side, numerous companies were already investing in research and innovative technologies to reduce employee costs and improve safety and efficiency. Many were already building a website presence and creating automated systems for online ordering, sales and payment. From the technology side, we were already seeing the emergence of AI (artificial intelligence), ML (machine learning), and cloud-based technologies (for data storage, management and analytics). Each of these pieces is changing the world of work; so COVID didn't change what was already happening, but it certainly sped it up.

COVID however did change something equally as important – and that is how we look at our personal lives and the importance of work. At one time we blamed millennials for wanting "work-life" balance, but COVID has made each and every one of us realize how important that really is. While working from home was very challenging at first, many have adapted and don't want to go back to the daily routine of getting ready for work, driving in, and driving home when we could save time and money and do that from the comfort of our home. Did most of us miss the face-to-face social interactions - of course we did, but many of us have adapted.

For families with school-aged children, there were challenges with virtual learning. In many cases, the mother of the family was often the one that stayed home as schools, daycares and sporting activities were closed. This meant working from home (if that was a choice) or leaving their job. As some economists note, this may put equity for women who were working, ten years behind.

And let's not forget those who were already struggling in low wage jobs or workplaces that closed temporarily (and in some cases permanently). Some went on to find other work and some chose to access government benefits which were in some cases, better than their previous salary. Now we hear employers say they can't find anyone for these low paying jobs...but one of my colleagues said it well. To paraphrase, he said "there are plenty of people who could work, but not many who want to work for those wages." This is creating another shift pushed by COVID. Some labour representatives are suggesting that workers are now in the driver's seat and in a better position to negotiate better wages – a complete reversal of the previous employer-employee dynamic. Employers who want to find and keep employees may now need to step up their game and offer better wages and benefits. Some, who have already done this, tend to reap the benefits of more loyal employees.

So where does this leave us with the future of work? Some of the changes we have seen were already happening and got a "COVID nudge" but others are beyond a nudge. They have created a monumental shift in how we see the world of work and amplified the balance that we want. That is a big shift.



Action Plan Update

WPSM PRIORITY AREAS

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

PRIORITY #1: support local labour market-related initiatives

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
Chamber of Commerce - workforce-related taskforce/events	Greater Sudbury Chamber of Commerce (GSCC) and business-related members	**Workforce Taskforce:** participate as taskforce member to address the need for workforce-related resources and strategies to mitigate labour shortages. **Events 2021-22:** participate in virtual or in-person roundtables and events related to the workforce.	ongoing as appropriate
LMI and support	Sudbury East Chamber of Commerce	Provide support, sponsorship and sharing of information on LMI issues, initiatives and resources.	ongoing as requested
Personal Support Workers	City of Greater Sudbury – Senior's Advisory Council	Provided support to 2 seniors' summits hosted by the City; Provided additional support to the City Council member lead and the Advisory Council.	cancel no activity early 2020
Indigenous workforce development	Kenjgewin Teg (KT)	LMI support and assistance as requested.	ongoing as requested
	Gezhootjig Employment and Training	Provide LMI support and offer to host ES provider consultations with staff each year.	ongoing as requested
	Atikameksheng Anishinabek (Whitefish)	LMI support and assistance as requested with annual career fair and other activities.	ongoing as requested
	M'Chigeeng Employment & Training	LMI support and assistance as requested with annual career fairs.	ongoing as requested
OYAP	Rainbow Board; Sudbury Catholic School Board	Provide LMI and consultations on a broad range of trades workforce development-related topics.	ongoing
Videos promoting the trades	Rainbow Board; Sudbury Catholic School Board; Edge Factor; local employers	Reached out to various trades employers to participate on screen in a series of videos on the skilled trades – various local employers agreed to participate.	project complete
Employer information videos	LAMBAC; Canadore College (post production studios)	Working at home video series complete (cyber security; website presence; and managing staff remotely). New video currently underway.	video complete part of video library
Ontario Regional Sounding	Conference Board of Canada; Future Skills Centre	Participated in several regional events. Will participate once again if requested and as scheduled.	complete as requested
Immigrant – economic integration and entrepreneurship	Sudbury Local Immigration Partnership (SLIP); various stakeholders	Participate as member of the immigrant economic integration and entrepreneurship committee to develop and implement a local strategy.	on hold
Rural Northern Immigration Pilot	City of Greater Sudbury	Provide LMI support and resources to RNIP.	ongoing as requested
Skills Catalyst Fund - Employer training activities	Professions North Nord (PNN); eNova Consulting	Provide LMI and guidance to their proposal to provide employers with training on successfully integrating internationally trained professionals. Project not funded.	cancel
Workforce development network	Economic Development (Sudbury); Chamber	New initiative to bring area partners together to network on workforce development activities and strategies	March 2023
Hiring International Talent	WPSM led; settlement services; RNIP and others	Develop a resource to help answer questions employers have about hiring international talent.	March 2022

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
PSW workforce taskforce	Northeast Local Health Integration Network (NELHIN); Health Ontario	Participate as member of the north regional advisory taskforce on behalf of workforce planning boards across the northeast.	monthly meetings ongoing
PSW subcommittees – working conditions and human capacity	Health Ontario north, NELHIN, various partners	Various actions related to improving working conditions and addressing human capacity – reports are available.	monthly meetings
Manitoulin – PSW shortages	LAMBAC; Employment Options; health care providers	Host several meetings on the status of PSWs on Manitoulin with key stakeholders and identify a strategy to address current/future shortages.	no further action due to COVID
Jill of all trades	Cambrian college; OYAP at both English boards	Continue to participate on planning committee; virtual event held October 2021; continued planning for next fiscal.	October 2021 May 2022
FONOM (Federation of NEO Municipalities) conference	Labour Market Group; Far Northeast Training Board; AWIC	Participate at FONOM event targeting municipal leads (mayors, council members, economic development, CEOs) re: northeast LMI; 2021 event cancelled but hope to participate in 2022	2021 event cancelled May 2022
Construction Outlook	Buildforce Canada; LMI committee northern Ontario	Participate in invite-only annual events to review a preliminary construction labour market outlook report to identify local workforce issues, gaps and projects.	December 2021 December 2022
Government outreach	Initiated by stakeholders and by WPSM	LMI presentations - local MPs, MPPs, Mayors, Council members, economic development, MLTSD and MENDM.	ongoing as scheduled
Tomorrow's Trades	Provincial Building and Trades Council of Ontario	Support local liaison coordinator with implementation of new initiative to introduce participants to the trades.	ongoing as requested

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
COVID business impact surveys	Greater Sudbury Chamber of Commerce; City of Greater Sudbury	Collaborated on 3 COVID-19 business surveys in 2020 and one in spring of 2021. A total of 1,150 employers responded to the four surveys. Multiple organizations assisted with dissemination. Analysis reports complete.	complete reports on website
TV and film workforce development	Cultural Industries Ontario North (CION)	Support CION's workforce initiatives; Identify industry occupations and skill level required.	ongoing support
Jobs in Sudbury Manitoulin Job Board	Windsor Essex planning board to assist with installation	Implement online job board developed by Windsor-Essex on WPSM website – to include promotion of online job board; job demand report and job search report; new activities to include training and event calendar to eliminate duplication and promote job events.	ongoing updated regularly
Skills Catalyst Fund – primary care needs	NOSM; Centre for Rural and Northern Ontario Research Laurentian University	Participate on advisory committee – to develop a forecasting model for physician demand in northeastern Ontario; examine needs/services in rural/remote areas. Project complete and report to MLTSD.	complete
Occupations projected to grow/decline	WPSM led; support from OMAFRA (EMSI analyst)	Continue to use EMSI tool to identify occupations projected to grow/decline for various industry sectors.	ongoing use
Workforce Planning Ontario (WPO)	All workforce planning boards across Ontario	Participate in provincial meetings to discuss: provincial issues, challenges, and policies. Bring northern perspective to the table.	semi-annual meetings
ICT/High-Tech industry	Phase two: WPSM, Petryna Advertising, IONIC Mechatronics	Phase two: Develop a resource for students and job seekers on identifying occupations, NOC, salary and skills required and a video featuring a local ICT employer.	phase 2 complete May 2021
Impact of new innovations/technology on mining occupations	WPSM led; planning boards in NE ON; mining and mining supply services	Conduct a research project on the impact of new innovations and technology on current and future mining job; identify retraining/up-skilling opportunities.	August 2022

Agriculture industry	OMAFRA; LAMBAC; other planning boards	Continue to participate in various food and agricultural conferences and roundtable consultations.	ongoing participation
Forestry sector	Led by AWIC and Ministry of Natural Resources and Forestry	Support a research project to understand workforce demand in the forestry industry; participate in a student survey re: knowledge and interest in this industry.	no request to date
Online Job vacancies research	Vicinityjobs.com; EO services; education partners	Access Vicinityjobs data to identify online job postings and industry demand. Challenges experienced with data accuracy and algorithm used.	cancel no longer using this data
Construction research	Northeastern Ontario Construction Association (NOCA)	Conduct a survey of construction industry businesses on hiring practices, requirements, strategies and demand.	July 2022
LMI	EMC (Excellence in Manufacturing Consortium)	Continue to support activities of the consortium with LMI	ongoing
Hospitality and tourism	OTEC (Ontario Tourism Education Council); various regional industry and municipal partners	Participate on regional advisory group; continue to provide LMI support and networking opportunities with local stakeholders.	ongoing

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

ACTION	PARTNERS	OUTCOME(S)	TIMELINE
In-demand skilled trades project	MLTSD project; WPSM led	WPSM lead for local project on in-demand skilled trades, projected shortages and the apprenticeship system. Share local results. No further request from MLTSD.	project complete
Skills Catalyst Fund	Northern college Consortium; economic development (CGS, Timmins, Sault Ste. Marie)	Develop micro-skills modules for municipal employees to increase opportunities to compete for management positions. No further funding from MLTSD. Contribute to the final report.	April 2022
Work Integrated Learning Advisory Committee	Laurentian University (funded by RBC Future Launch)	Participate on advisory committee to support WIL (work integrated learning) to assess what departments offer WIL. Coordinator has resigned and status of funding uncertain.	no further activity
Support Ontario Youth - apprenticeships	Ontario Electrical League; Support Ontario Youth	Continue to support this initiative and possible uptake in Sudbury despite no current interest by employers.	ongoing
Trade talks **HDE technician** **Auto Service Technician**	WPSM lead; local colleges and employers in these trades	Host "trade talk" events with local colleges targeting industry employers; virtual tour of trade shops; discuss needs/expectations; increase apprenticeship opportunities. Highly successful but future events on hold due to COVID.	2 events complete May 2021
Education Coordinating Team (ECT)	Area school boards; post secondary institutions; MLTSD	Continue to provide opportunities to increase ECT's knowledge re: employer needs to better align education and industry. Various events held each year.	quarterly virtual meetings
Stellar Awards	WPSM led; Education Coordinating Team	Host bi-annual Stellar Awards event to recognize employers who provide exemplary learning experiences for students.	delayed to Nov 2022
GSCC online job portal	Greater Sudbury Chamber of Commerce; WPSM	Chamber is hosting s job portal which is free for employer members to post their jobs. WPSM sponsorship.	job portal implemented
Employment Ontario (EO) network	WPSM led	Regular consultations with EO services on EO data, LMI, EO network challenges, and needs of employers and job-seekers.	annual consultations

Key Stakeholders & Resources

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

IMMIGRATION/INTERNATIONALLY TRAINED:
Sudbury Local Immigration Partnership
Rural Northern Immigration Pilot

LABOUR:
Various unions/locals

ASSOCIATIONS:
BuildForce Canada
Canadian Mental Health Association
Excellence in Manufacturing Consortium
North Eastern Ontario Construction Association
Ontario Construction Secretariat
Ontario Electrical League
MineConnect (former SAMSSA)
Provincial Building/Trades Council of Ontario

ECONOMIC DEVELOPMENT/BUSINESS:
First Nations - Economic development leads
Greater Sudbury Economic Development
LAMBAC
Greater Sudbury Chamber of Commerce
Sudbury East Chamber of Commerce
Société Économique de l'Ontario

INDIGENOUS ORGANIZATIONS:
Atikameksheng Anishinabek
Gezhtoojig Employment & Training
Kenjgewin Teg
N'Swakamok Native Friendship Centre

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

TRAINING, EDUCATION AND EMPLOYMENT:
Cambrian College
Canadore College
Collège Boréal
Conseil scolaire catholique du Nouvel-Ontario
Conseil scolaire public du Grand Nord de l'Ontario
Employment Options Emploi
Employment Support Services, Greater Sudbury
Laurentian University
March of Dimes
Manitoulin – Sudbury District Services Board
Northern College
NOSM (Northern Ontario School of Medicine)
Ontario Tourism Education Council
Rainbow District School Board
Spark Employment Services
SOY (Support Ontario Youth)
Sudbury Catholic District School Board
Tomorrow's Trades
YMCA Northeast Employment/Immigrant Services

RESEARCH AND INNOVATION:
CEMI (Centre for Excellence in Mining Innovation)
NPI (Northern Policy Institute)
NORCAT
MiHR (Mining Industry HR Council)

MEDIA:
CBC
CTV – northern Ontario
Northern Life
Northern Ontario Business
Manitoulin Expositor
Roger's Communication
Sudbury Star

References & Other Sources

BuildForce Canada. **Northern Ontario Construction Overview.** December 2021.

Employment Support Services, City of Greater Sudbury. **Labour Market Monitor** (monthly and annual reports).

EMSI Analyst. **Home support workers, housekeepers and related occupations in 3 Ontario Census Divisions.**

Deloitte Insights. **Tracking the Trends 2020.** 2020.

International Minerals Innovation Institute. **Workforce of the Future - Critical Skills in Saskatchewan's Minerals Industry.** 2020.

McKinsey & Company. **56 Foundational Skills.** 2021.

Ministry of Agriculture, Food and Rural Affairs. **EMSI Analyst.** 2021.

Mining industry Human Resources Council. **The Changing Nature of Work Innovation, Automation and Canada's Mining Workforce.** May 2020.

Ministry of Labour, Training and Skills Development. **Employment Ontario Services CaMS data.** 2020-2021.

Ontario Chamber of Commerce. **2021 Ontario Economic Report.** 2021.

Ontario Health Coalition. **Caring in Crisis: Ontario's Long-Term Care PSW Shortage.** Commissioned by UNIFOR. Dec 2019.

Statistics Canada. **Canadian Business Counts.** June 2021.

Statistics Canada. **Experimental Estimates for Business Openings and Closures.** June 2021.

Technation. **Skilling Canadians for Leadership in the AI Economy.** June 2020.

Workforce Planning for Sudbury & Manitoulin. **COVID-19 Business Impact Survey Results May 2021.** 2021.

Workforce Planning for Sudbury & Manitoulin. **COVID-19 Business Impact Survey Results June 2020.** 2020.

Workforce Planning for Sudbury & Manitoulin. **A Survey of ICT/High-Tech Employers in Greater Sudbury. Workforce demand, growth and recruitment practices.** July 2020.

Workforce Planning for Sudbury & Manitoulin. **Survey of Personal Support Workers in Greater Sudbury.** 2019.

Zizys, Tom. **Impact of the Covid-19 Pandemic, Lockdown and Aftermath on the Ontario Labour Market.** September 2020.