FAR NORTHEAST TRAINING BOARD (FNETB)
your Local Employment Planning Council

COMMISSION DE FORMATION DU NORD-EST (CFNE)
votre Conseil Local de Planification de l'Emploi

EVIDENCE-BASED LABOUR MARKET PLANNING
for Kirkland Lake

Ontario

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TABLE OF CONTENTS

BACKGROUND

Ten labour market indicator analysis workshops were held across the region between November 28th, 2016 and January 17, 2017. The purpose of the workshops was to present a limited set of labour market indicators that are deemed important to local labour market planning. During the full-day facilitated workshop participants analyzed the proposed indicators using an established framework. The intention was to help them better understand what they were looking at, how to look at that data, and why. More importantly, participants were provided with an opportunity to discuss the analysis in the context of what they know of their community, and how the data could help inform local planning decisions.

INTRODUCTION

This document provides a summary analysis of those labour market indicators at the community level. It includes labour market demand and supply indicators for Kirkland Lake, and in some cases, compares the community's data to the Timiskaming District and to Ontario. The goal is to provide a minimum interpretive framework to support and encourage 'evidence-based' or 'evidence-informed' planning of employment and training services, and to help decision makers inform their actions with relevant data.

The following pages present data analysis as well as comments shared by community stakeholders during the labour market indicator workshop that was held in Kirkland Lake on November 29th, 2016. During that session, for each of the indicators, stakeholders were asked to discuss whether the data made sense to them based on their knowledge of the challenges, opportunities and implications for the local labour market.

Section 1 of this document provides a summarized analysis of the labour market demand indicators as well as the notes/comments collected from local stakeholders during the workshop.

Section 2 contains the analysis of, and comments on the supply indicators.

Section 3 includes two appendices.
Appendix A: Data sources and their limitations
Appendix B: Worksheets to assist you and your team prepare for the upcoming local labour market planning meetings that will be held across the region between February 13th and March 9th, 2017.

Planning Meetings - Schedule	
Feb 13, 2017	Temiskaming Shores
Feb 14, 2017	Kirkland Lake
Feb 15, 2017	Iroquois Falls
Feb 16, 2017	Cochrane
Mar 1, 2017	Chapleau
Mar 2, 2017	Timmins
Mar 6, 2017	Hearst
Mar 7, 2017	Kapuskasing
Mar 9, 2017	Moose Factory

1. NUMBER OF EMPLOYERS

The number of employers, the size of employers and changes in the number and size of employers over time affect employment levels and employment opportunities within a local labour market. Based on Statistics Canada's Business Counts, in June 2016:

- 57.0% of businesses in Kirkland Lake were businesses with no employees
- Businesses with 1 to 9 employees represent 72.6% (172 businesses) of the total number of SMEs (1 to 99 employees)
- Large businesses of 100+ employees only make up 1.1% of the total number of businesses in Kirkland Lake.

Change in the Number of Businesses:

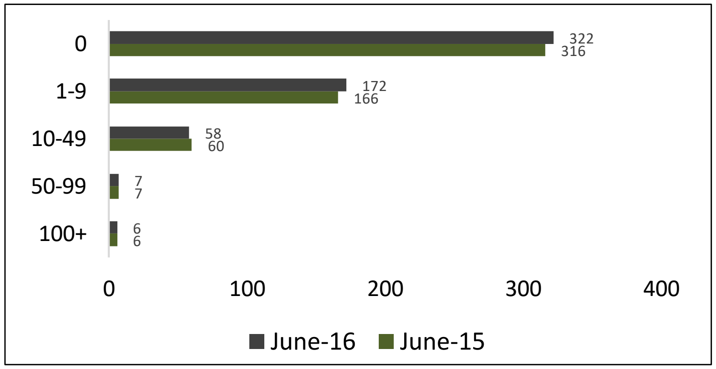
As can be seen in Figure A, Statistics Canada's Business Counts shows little change in the number of businesses between June 2015 and June 2016:

- The number of businesses with no employees increased by 1.9% or +6 businesses
- Businesses with 1 to 9 employees increased by 3.6% (+6 businesses), businesses with 10 to 49 employees decreased by -3.3% (-2 businesses).
- There was no change in the number of businesses 50 to 99 employees and with 100+ employees.

TABLE 1: NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE KIRKLAND LAKE, JUNE 2016

	#	% of total
0	322	57%
1-9	172	30%
10-49	58	10%
50-99	7	1%
100+	6	1%
	565	

FIGURE A: CHANGE IN THE NUMBER OF BUSINESSES KIRKLAND LAKE, JUNE 2015 TO JUNE 2016



Source: Statistics Canada, Canadian Business Counts

Industrial Composition of Local Businesses:

Table 2 shows that in Kirkland Lake, in June 2016:

- Real Estate, Professional, Scientific and Technical Services, and Ambulatory Health Care were the industries with the largest number of employers. However, although there are many businesses in the real estate industry, most are small enterprises with fewer than five employees, and therefore this industry may not represent a large proportion of total employment.
- The distribution of employers is different in Kirkland Lake compared to the Timiskaming District and the province in certain industries. For example, there is a smaller proportion of employers in the truck transportation industry in Kirkland Lake compared to Timiskaming District, but a larger proportion of employers in the real estate industry. In addition, there is a smaller proportion of employers in Professional, Scientific and Technical Services in Kirkland Lake than in the province, but a larger proportion of employers in Support Activities for Mining, and Oil and Gas Extraction.

TABLE 2: TOP 20 INDUSTRIES BY TOTAL NUMBER OF EMPLOYERS, BY EMPLOYEE SIZE RANGE
KIRKLAND LAKE, TIMISKAMING DISTRICT, ONTARIO, JUNE 2016

NAICS	0	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+	Total	Kirkland Lake %	Timisk. District %	Ontario %
213 - Support activities for mining, and oil and gas extraction	12	1	1	0	0	1	1	0	0	16	2.8	1.1	0.1
236 - Construction of buildings	7	5	5	1	0	0	0	0	0	18	3.2	3.2	2.9
238 - Specialty trade contractors	9	6	4	1	0	0	0	0	0	20	3.5	5.7	5.3
441 – Motor vehicle and part dealers	0	3	1	2	2	0	0	0	0	8	1.4	1.3	0.6
445 - Food and beverage stores	4	2	4	1	0	1	1	0	0	13	2.3	1.5	1.0
447 - Gasoline stations	6	3	1	0	0	0	0	0	0	10	1.8	1.0	0.4
448 - Clothing and clothing accessories stores	0	6	2	1	0	0	0	0	0	9	1.6	1.0	0.8
453 - Miscellaneous store retailers	5	5	4	1	0	0	0	0	0	15	2.7	1.4	0.7
484 - Truck transportation	5	3	2	1	0	0	0	0	0	11	1.9	4.3	3.2
523 - Securities, commodity contracts, & other financial investment & related activities	13	1	0	0	0	0	0	0	0	14	2.5	1.8	3.2
531 - Real estate	90	4	2	0	0	0	0	0	0	96	17.0	14.0	15.5
532 - Rental and leasing services	5	1	0	1	0	0	0	0	0	7	1.2	0.6	0.4
541 - Professional, scientific and technical services	20	10	5	1	1	0	0	0	0	37	6.5	5.2	12.6
551 - Management of companies and enterprises	13	0	0	0	0	0	0	0	0	13	2.3	1.5	2.1
561 - Administrative and support services	12	4	0	1	0	0	0	0	0	17	3.0	2.6	3.6
621 - Ambulatory health care services	14	9	2	2	2	0	0	0	0	29	5.1	3.9	4.9
722 - Food services and drinking places	6	1	5	5	2	1	0	0	0	20	3.5	3.3	2.5
811 - Repair and maintenance	6	4	2	1	1	0	0	0	0	14	2.4	2.8	1.8
812 - Personal and laundry services	12	5	1	1	0	0	0	0	0	19	3.4	2.1	1.8
813 - Religious, grant-making, civic & professional &similar	3	8	0	1	0	0	0	0	0	12	2.1	2.1	1.8

Source: Statistics Canada, Canadian Business Counts

2. EMPLOYMENT BY INDUSTRY

The industrial structure of an area – and, more specifically, shifts in industrial structure, can have significant consequences for the local labour market. Since the nature and composition of each industry tends to vary from one industry to the next, shifts in this structure can affect the supply of jobs and the demand for particular skills.

The following table shows that in 2011:

- Health Care and Social Assistance was the largest source of employment in Kirkland Lake (18.8% of total employment).
- Mining and Oil and Gas Extraction industry was another large source of employment in Kirkland Lake (14.2% of total employment).

TABLE 3: EMPLOYMENT BY INDUSTRY
KIRKLAND LAKE, TIMISKAMING DISTRICT, ONTARIO, 2011

		Kirkland Lake 2011	Kirkland Lake Distribution (%)	Timiskaming District Distribution (%)	Ontario Distribution (%)
11	Agriculture, forestry, fishing and hunting	70	1.8	5.8	1.5
21	Mining and oil and gas extraction	540	14.2	7.2	0.4
22	Utilities	65	1.7	1.1	0.9
23	Construction	200	5.3	7.8	6.3
31-33	Manufacturing	215	5.7	7.4	10.4
41	Wholesale Trade	40	1.1	1.4	4.6
44-45	Retail Trade	495	13.0	15.5	11.2
48-49	Transportation and warehousing	175	4.6	5.8	4.6
51	Information and cultural industries	45	1.2	1.6	2.7
52	Finance and insurance	80	2.1	2.2	5.5
53	Real estate and rental and leasing	55	1.4	1.2	2.0
54	Professional, scientific and technical services	90	2.4	2.0	7.6
55	Management of companies and enterprises	0	0.0	0.0	0.1
56	Administrative and support, waste management and remediation services	60	1.6	2.4	4.6
61	Educational services	235	6.2	6.8	7.5
62	Health care and social assistance	715	18.8	13.8	10.4
71	Arts, entertainment and recreation	50	1.3	0.8	2.2
72	Accommodation and food services	120	3.2	5.3	6.3
81	Other services (except public administration)	85	2.2	4.9	4.4
91	Public administration	460	12.1	6.9	6.9
	All industries	**3,800**	**100.0**	**100.0**	**100.0**

Source: Statistics Canada, National Household Survey 2011

Table 4 looks at changes in employment by industry between 2013 and 2015. Although the data in the following table is more recent, it is not available at the community level. The closest geography for which this data is available is the Northeastern Economic Region*. The data reveals that between 2013 and 2015:

- Forestry, Fishing, Mining, Quarrying, Oil and Gas Extraction was the fastest growing industry both in Northeastern Ontario and in Ontario (30% and 20.6% respectively) during this time period. Agriculture and Public Administration grew in Northeastern Ontario (16.7% and 3.3% respectively) while these industries decreased in Ontario (-8.2% and -7.4% respectively).
- The three industries that saw the largest decrease in Northeastern Ontario were Utilities (-44.7%), Other Services (except public administration) (-21.1%), and Transportation and Warehousing (-18%). At the Ontario level, these industries also experienced a decrease in employment during this time period.

TABLE 4: CHANGE IN THE TOTAL EMPLOYMENT BY INDUSTRY NORTHEAST – ECONOMIC REGION, ONTARIO, 2013 TO 2015

Northeast Ontario Economic Region				Ontario
	2013	2015	Change (%) 2013 to 2015	Change (%) 2013-2015
Goods-producing sector	**58,600**	**60,500**	**3.2**	**0.3**
Agriculture	1,800	2,100	16.7	-8.2
Forestry, fishing, mining, oil and gas	16,000	20,800	30.0	20.6
Utilities	3,800	2,100	-44.7	-4.6
Construction	19,200	16,900	-12.0	6.1
Manufacturing	17,800	18,600	4.5	-2.9
Services-producing sector	**195,100**	**187,600**	**-3.8**	**1.8**
Wholesale and retail trade	43,400	41,500	-4.4	2.3
Transportation and warehousing	13,300	10,900	-18.0	-4.5
Finance, insurance, real estate and leasing	9,900	8,500	-14.1	6.5
Professional, scientific & technical services	10,500	10,600	1.0	6.8
Business, building & other support services	9,000	10,700	18.9	1.7
Educational services	18,000	18,000	0.0	6.5
Health care and social assistance	37,900	39,600	4.5	2.7
Information, culture and recreation	8,900	8,400	-5.6	-0.6
Accommodation and food services	17,600	15,000	-14.8	0.8
Other services (except public administration)	11,400	9,000	-21.1	-5.3
Public administration	15,000	15,500	3.3	-7.4
Total employed	**253,700**	**248,100**	**-2.2**	**1.5**

Source: Statistics Canada, Labour Force Survey, CANSIM Table: 282-0125

**Northeastern Ontario Economic Region: Sudbury, Elliot Lake, North Bay, Sault Ste. Marie, Timmins, Algoma, Blind River, Capreol, Cobalt, Englehart, Espanola, Garson Junction, Haileybury, Hearst, Iroquois Falls, Kapuskasing, Kirkland Lake, Mattawa, New Liskeard, Nickel Centre, Parry Sound, Powassan, Temiskaming Shores, Thessalon, Valley East, Blezard Valley, Carol Richard Park, Connaught Hill, Dowling, Elmview, Finntown, Flake, Guilletville, Hanmer, Laurentien, Levack, Lively, McCrea Heights, Naughton, Parkwood, Pinecrest, Porcupine, Pottsville, South Porcupine, Val Caron, Val Therese.*

3. EMPLOYMENT BY OCCUPATION

While industries experiencing growth need additional workers, the demand for specific occupations is a function of the work that needs to be done. Both the changing marketplace and the advance of technology alter the demand for occupations, with some occupations growing strongly and others in decline.

Based on the 2011 Census data, Table 5 below shows that:

- Sales and Service occupations represented the largest share of total employment in Kirkland Lake (20.1%) as is the case in the Timiskaming District (22.2%) and in Ontario (23.2%).
  Employment in Trades, Transport and Equipment and Related Occupations is higher in Kirkland Lake and in the Timiskaming District (18.9% and 21.4% respectively), compared to 13.0% in Ontario. This is likely attributable to the industrial and natural resource based nature of the local economy.

TABLE 5: EMPLOYMENT BY OCCUPATION
KIRKLAND LAKE, TIMISKAMING DISTRICT, ONTARIO, 2011

		Kirkland Lake Labour Force 2011	Kirkland Lake Distribution %	Timiskaming District Distribution %	Ontario Distribution %
	Total	**3,800**	**100.0**	**100.0**	**100.0**
0	Management occupations	255	6.7	9.5	11.5
1	Business, finance and administration occupations	490	12.9	12.3	17.0
2	Natural and applied sciences and related occupations	205	5.4	4.5	7.4
3	Health occupations	325	8.6	6.9	5.9
4	Occupations in education, law and social, community and government services	575	15.1	11.6	12.0
5	Occupations in art, culture, recreation and sport	90	2.4	1.5	3.1
6	Sales and services occupations	765	20.1	22.2	23.2
7	Trade, transport and equipment operators and related occupations	720	18.9	21.4	13.0
8	Natural resources, agriculture and related production occupations	280	7.4	6.5	1.6
9	Occupations in manufacturing and utilities	100	2.6	3.5	5.2

Source: Statistics Canada, National Household Survey 2011

The following table looks at changes in employment by occupation between 2013 and 2015. The data in this table is more recent, but the closest geography for which it is available at the Northeastern Economic Region. The data reveals that between 2013 and 2015:

- The occupational categories with the highest increases were Natural Resources, Agriculture and Related Production Occupations (28%) and Occupations in Manufacturing and Utilities (16.2%), again reflecting the industrial and natural resource based nature of the region`s economy. Occupations that experienced the most significant decreases in Northeastern Ontario are Occupations in Art, Culture, Recreation and Sport (-12.5%) and Business, Finance and Administration Occupations (-9.7%).

TABLE 6: CHANGE IN THE TOTAL EMPLOYMENT BY OCCUPATION
NORTHEASTERN ONTARIO AND ONTARIO, 2013 TO 2015

		Northeastern Ontario			Ontario
		2013	2015	2013-2015 Change (%)	2013-2015 Change (%)
2	Natural resources, agriculture and related production occupations	9,300	11,900	28.0	8.7
9	Occupations in manufacturing and utilities	7,400	8,600	16.2	-2.9
4	Occupations in education, law and social, community and government services	29,000	30,600	5.5	4.3
3	Health occupations	21,600	22,300	3.2	4.1
8	Natural and applied sciences and related occupations	13,500	13,700	1.5	11.2
0	Management occupations	18,300	17,500	-4.4	-6.2
7	Trades, transport and equipment operators and related occupations	46,500	44,300	-4.7	1.9
6	Sales and service occupations	67,300	62,600	-7.0	0.2
1	Business, finance and administration occupations	36,000	32,500	-9.7	1.2
5	Occupations in art, culture, recreation and sport	4,800	4,200	-12.5	0.7
	Total employed	**253,700**	**248,100**	**-2.2**	**1.5**

Source: Statistics Canada, Labour Force Survey, CANSIM Table: 282-0157

Table 7 presents information that is more localized. The data is presented for the region serviced by the Kirkland & District Community Futures Development Corporation. It highlights the occupations in the Kirkland Lake area with the highest numbers of anticipated retirements between 2011 and 2031. The data is based on the assumption that workers who were employed in those occupations at the time of the 2011 Census retire as they reach the age of 65.

It is important to note that someone exiting the labour force does not necessarily mean that their position will be replaced but, given the high number of potential exists in some categories, the data provides an indication of the need to prepare a future generation of workers for those occupations.

TABLE 7: OCCUPATIONS WITH HIGHEST ANTICIPATED NUMBER OF RETIREMENTS
KIRKLAND & DISTRICT CFDC, 2011-2031

	Kirkland & District
0 – Management	**360**
00 – Senior Management Occupations	15
01-05 – Specialized Middle Management Occupations	85
06 – Middle Management Occupations in Retail and Wholesale Trade and Customer Services	100
07-09 – Middle Management Occupations in Trades, Transportation, Production and Utilities	160
1 - Business, Finance and Administration Occupations	**510**
11 – Professional Occupations in Business and Finance	40
12 – Administrative and Financial Supervisors and Administrative Occupations	185
14 – Office Support Occupations	285
2 – Natural and Applied Sciences and Related Occupations	**85**
22 – Technical Occupations in Natural and Applied Sciences	85
3 – Health Occupations	**120**
30 – Occupations in Nursing	120
04 – Occupations in Education, Law and Social, Community and Government Services	**170**
41 – Professional Occupations in Law and Social, Community and Government Services	45
42 – Paraprofessional Occupations in Legal, Social, Community and Education Services	85
44 – Care Providers and Educational, Legal and Public Protection Support Occupations	40
6 – Sales and Service Occupations	**445**
65 – Service Representatives and Other Customer and Personal Services Occupations	160
66 – Sales Support Occupations	105
67 – Service Support and Other Service Occupations	180
7 – Trades, Transport and Equipment Operators and Related Occupations	**1,015**
72 – Industrial, Electrical and Construction Trades	230
73 – Maintenance and Equipment Operation Trades	240
75 – Transport and Heavy Equipment Operation and Related Maintenance Occupations	455
76 – Trades Helpers, Construction Labourers and Related Occupations	90
8 – Natural Resources, Agriculture and Related Production Occupations	**165**
82 – Supervisors and Technical Occupations in Natural Resources, Agriculture and Related Production	165
9 – Occupations in Manufacturing and Utilities Occupations	**25**
92 – Processing, Manufacturing and Utilities Supervisors and Central Control Operators	25

Source: FNETB Local Labour Market Forecast 2011-2031

Table 7 contains data on the number of potential labour force exits based on anticipated retirements.

The data indicates that the occupational categories with the highest number of anticipated retirements are in Trades, Transport and Equipment Operators and Related, Business, Finance and Administration, and Sales and Service Occupations.

As we saw in a previous table, those are also the occupations that hire the most people in Kirkland Lake. This seems to indicate a need to prepare a future generation of workers for those occupations.

Tables 8 and 9 present information that was collected from local employers in the fall of 2015.

The data appears to validate what the previous data sources highlighted. Local employers who responded to the EmployerOne survey in 2015 are hiring in those occupations that are identified as increasing, and those where there are high numbers of anticipated retirements.

This data also suggests the need to train and attract workers for those occupations in order to meet the current and future demand.

TABLE 8: OCCUPATIONS WITH THE HIGHEST NUMBER OF HIRES IN THE PAST 12 MONTHS FAR NORTHEAST TRAINING BOARD (FNETB) REGION, 2015

Occupation	Number	Occupation	Number
Food & beverage server	188	Millwright	26
General labourer	128	Room attendant	22
Equipment operator	106	Lifeguards	20
Administrative/clerical	43	Plant operators	20
Truck drivers	41	Registered practical nurse	18
Personal support worker	40	Sawmill & planer workers	18
Summer student	37	Assistant residential counselor	17
Professor	31	Sales clerk	16
Cashier	30	Driller helpers	15
Registered nurse	30	Residential worker	15

Source: FNETB 2015 EmployerOne Survey

TABLE 9: OCCUPATIONS WITH THE HIGHEST NUMBER OF ANTICIPATED HIRES IN THE NEXT 12 MONTHS, FAR NORTHEAST TRAINING BOARD (FNETB) REGION, 2015

	Full-time	Part-time	Contract	Seasonal	TOTAL PROJECTED HIRINGS
Managers & Executives	18	0	0	0	**18**
Professionals	23	19	8	0	**50**
Technical	12	6	0	0	**18**
Trades	25	6	1	4	**36**
Apprentices	13	1	0	0	**14**
Sales & Marketing	8	5	0	1	**14**
Admin & Clerical	32	21	1	5	**59**
Production Worker	42	28	0	128	**198**
Service Worker	54	55	2	7	**118**
Other	8	10	22	34	**74**
PROJECTED HIRINGS	**235**	**151**	**34**	**179**	**599**

Source: FNETB 2015 EmployerOne Survey

LABOUR MARKET DEMAND INDICATORS – WHAT WE HEARD
Kirkland Lake – November 29th, 2016

INDICATOR 1: NUMBER OF BUSINESSES	INDICATOR 2: EMPLOYMENT BY INDUSTRY	INDICATOR 3: EMPLOYMENT BY OCCUPATION
Challenges: • This data seems to be contrary to local "folklore" (what we say or think about the community's labour force). We think our employer base is mining and forestry. • Surprised we are lower in Specialty Trades and Truck Transportation; are we using rail for transportation instead of trucks? • Seeing many smaller businesses close. • We have a habit of shopping out of town and don't support our small businesses Opportunities: We may need more self-employment programs and training to support our high number of small businesses.	Challenges: • Pull of the mines for higher wages leaves gaps in labour market and contributes to high employee turnover in some industries. • Few retail stores here; prices are perceived to be high. • Residents shop retail online or out of town out of "habit". Opportunities: • Education is well aligned with health and mining; high employment in these areas.	Challenges: • Seeing technology replacing local jobs. • Apprenticeship ratios limit uptake of new apprentices. • Lower skilled workers have challenges gaining employment - employers reluctant to take them on, concerned for high level of supervision, expectations may be too high. Opportunities: • Develop-in-house training for transportation & heavy equipment operators. • Incentivize employers to invest in employee training & max out apprenticeship ratios. • Redirect people to training programs where the jobs are (heavy equipment operator, truck transportation) for 2nd career, or those with no GED. • Create a hiring pool for employers to use. • Increase number of work placements to help students, job seekers to gain skills & experience. • Encourage employers & the community to embrace and "open up" to persons with barrier. • Have one-on-one skill development programs for persons with barriers; put in place bridging support to help employers who take on employees who have barriers. • Identify jobs that do not need Grade 12/GED and match those jobs with persons with barriers? • Market "success stories" of hard to serve employees to employers, the community.

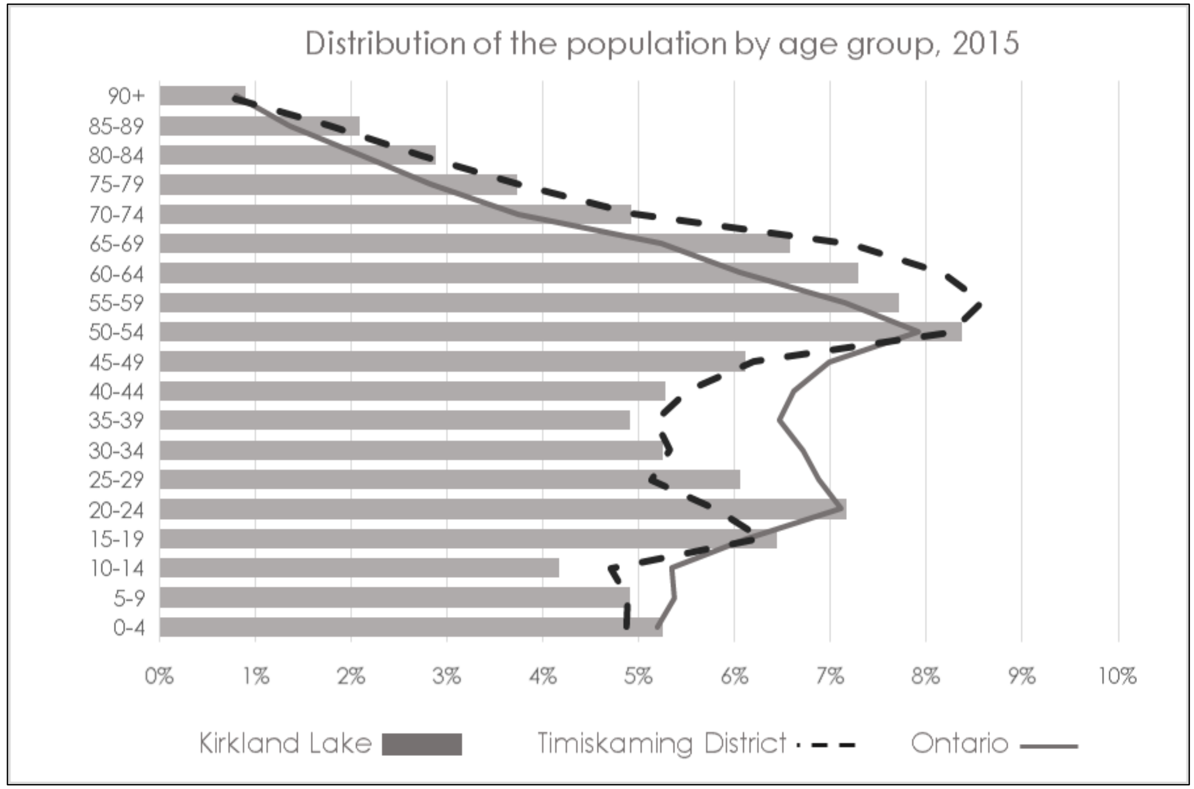
4. POPULATION

Population growth is the ultimate driver of labour market supply, as well as being a key component of the demand for some categories of workers. Changes over time can have dramatic effects on local labour markets.

FIGURE B: DISTRIBUTION OF THE POPULATION BY AGE COHORT
KIRKLAND LAKE, TIMISKAMING DISTRICT AND ONTARIO, 2015

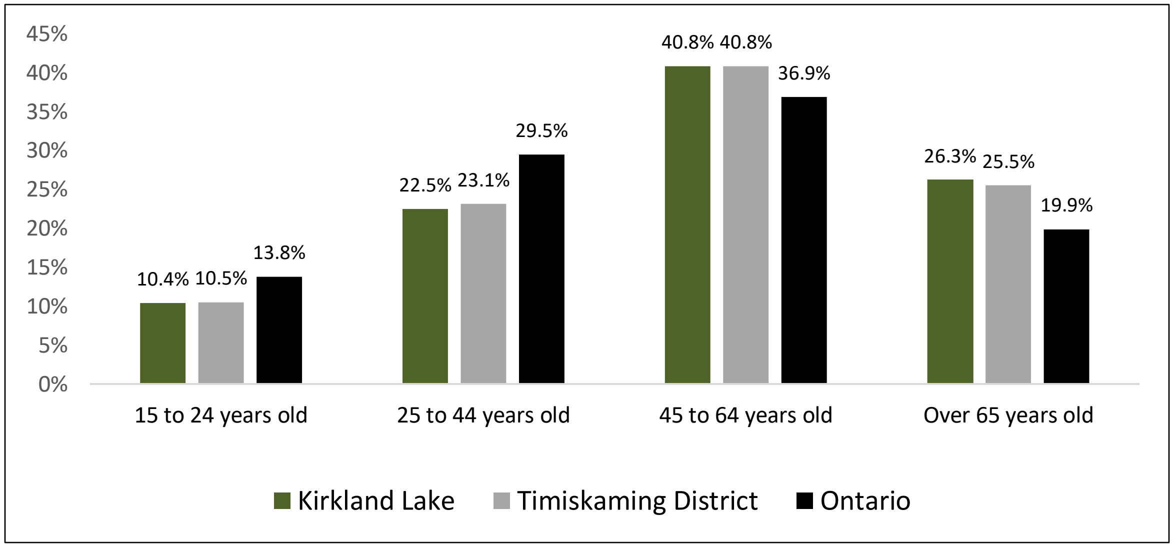
- The overall age distribution of Kirkland Lake's population is quite similar to that of the Timiskaming District. It does however show a lower proportion in the younger age cohorts and much higher proportions for the older cohorts compared to the province.

- The proportion of those in the prime working age population (25 to 49) is significantly lower in Kirkland Lake compared to Ontario.



Source: Statistics Canada, Estimates of population

FIGURE C: FRANCOPHONES AS A PERCENTAGE OF THE LABOUR FORCE, BY GROUP, 2011



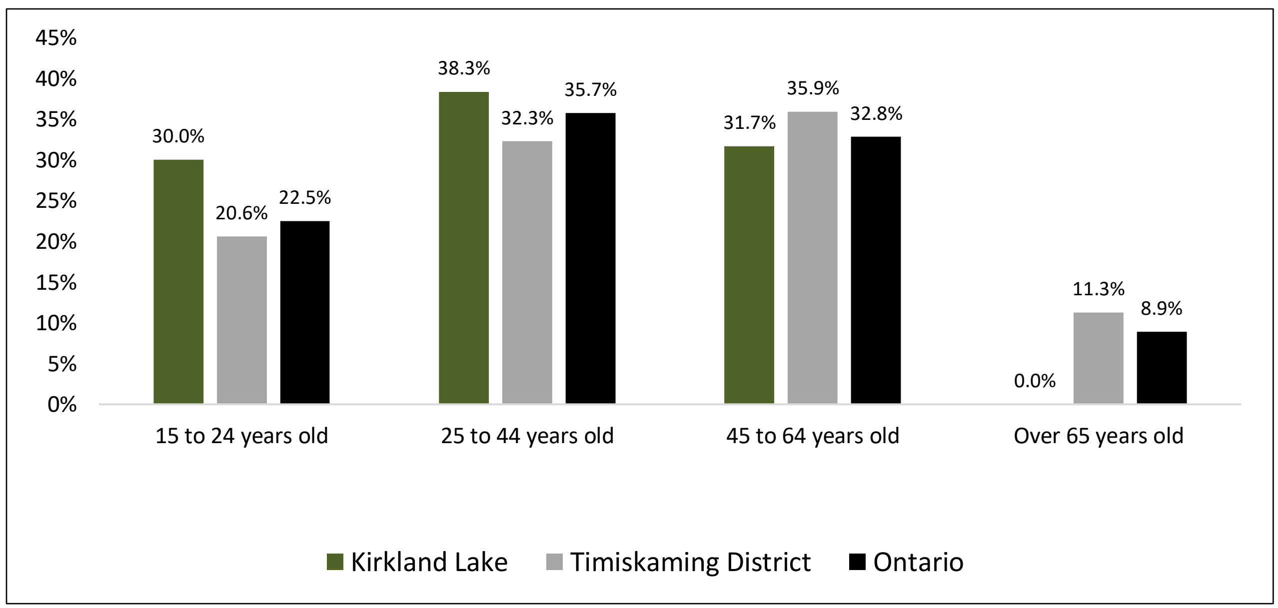
The age distribution of the Francophone population in Kirkland Lake mirrors that of Timiskaming District.

When compared to Ontario we observe that we have a Francophone population that is older both in Kirkland Lake and in the Timiskaming District.

Source: Statistics Canada, Census 2011

FIGURE D: ABORIGINALS AS A PERCENTAGE OF THE LABOUR FORCE, BY AGE GROUP, 2011

Compared to the Timiskaming District and to the province, the Aboriginal population in Kirkland Lake has a higher proportion in the younger age cohorts, particularly in the 15 to 24 cohort.

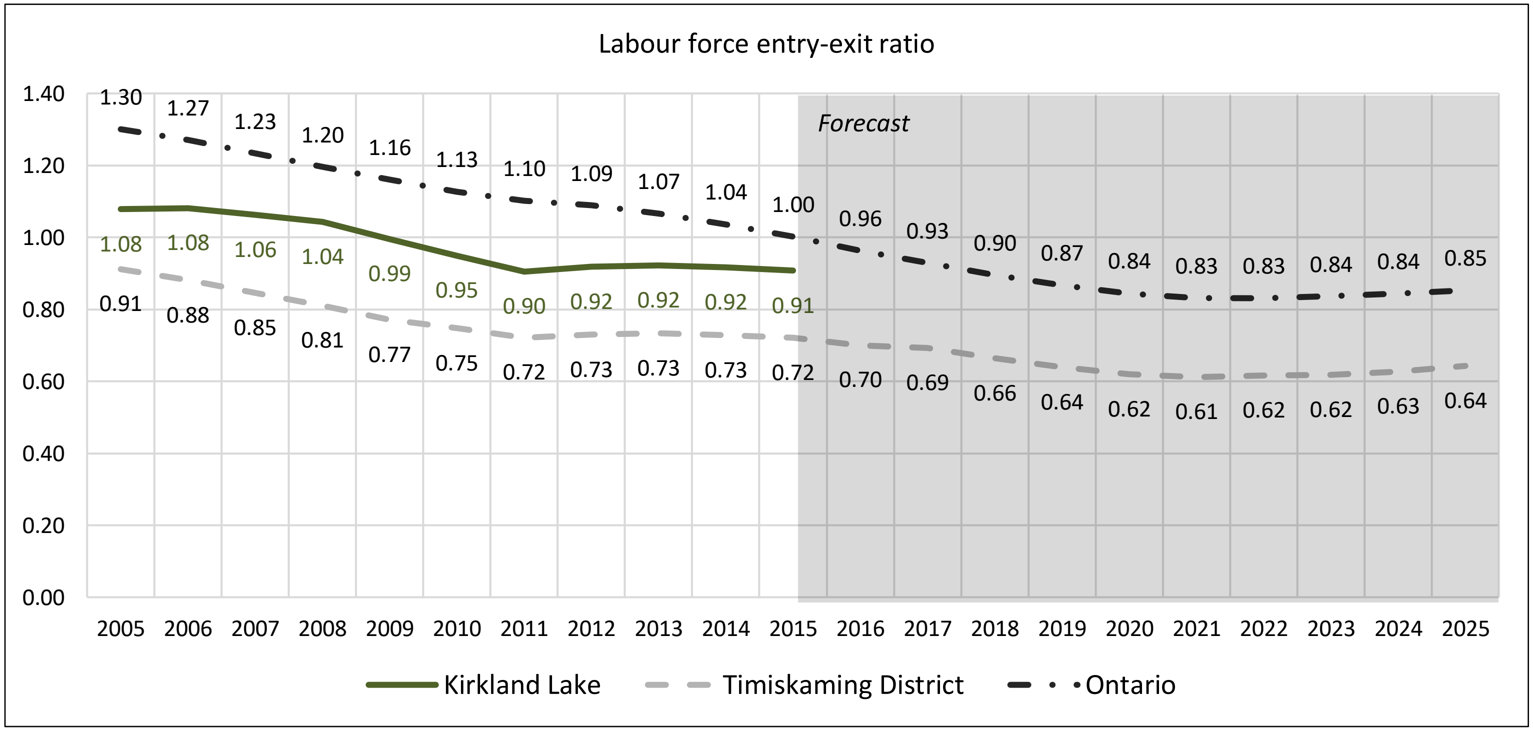


Source: Statistics Canada, Census 2011

LABOUR FORCE ENTRY-EXIT RATIO

The labour force entry-exit ratio shows the number of workers ready to enter the workforce (15 to 24 years old) to potentially replace those who will retire in the coming years (55 to 64 years old). In Kirkland Lake, the ratio of 0.91 in 2015 indicates that there are not quite enough workers entering the labour market to ensure that all those retiring will be replaced.

FIGURE E: LABOUR FORCE ENTRY-EXIT RATIO
KIRKLAND LAKE, TIMISKAMING DISTRICT AND ONTARIO, 2005 TO 2025



Source: Statistics Canada, Estimates of population and Ministry of finances forecasts, spring 2016 population projections update, for the forecast

5. MIGRATION

An area's migration patterns are often indicative of its labour force characteristics. Areas offering the greatest employment growth attract more people than they lose. Areas that offer less employment growth tend to lose more people than they attract. It is important to note that migration data is only available at the district level.

TABLE 10: IN-MIGRATION, OUT-MIGRATION, AND NET MIGRATION, BY AGE GROUP TIMISKAMING DISTRICT, 2012-13

	In-migration	Out-Migration	Net Migration
0 to 17	245	216	29
18 to 24	130	204	-74
25 to 44	308	349	-41
45 to 64	214	194	20
65+	69	131	-62
TOTAL	**966**	**1094**	**-128**

Source: Statistics Canada, Taxfiler, 2012-2013

For Timiskaming District, the number of emigrants is greater than the number of immigrants (negative net migration) for almost every age group.

When we look at Table 8, which shows the origin and destination of migrants we see that a good part of the migration (in or out) happens within Northeastern

TABLE 11: TOP 5 DISTRICT, IN-MIGRATION, OUT-MIGRATION, BY AGE GROUP TIMISKAMING DISTRICT, 2012-13

	IN-MIGRATION (ORIGIN)					OUT-MIGRATION (DESTINATION)				
	Total population 15+	18 to 24	25 to 44	45 to 64	65+	Total population 15+	18 to 24	25 to 44	45 to 64	65+
Algoma		✓			✓					
Cochrane	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Durham									✓	
Greater Sudbury	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Hamilton				✓	✓					
Niagara									✓	
Nipissing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ottawa	✓		✓			✓	✓	✓		✓
Simcoe	✓	✓		✓	✓	✓				✓
Toronto			✓			✓	✓	✓	✓	

Source: Statistics Canada, Taxfiler, 2012-2013

6. EDUCATION

Employers continue to require higher educational attainments for a wider range of occupations. Statistics Canada Census data from 2011 reveals that:

- Although Kirkland Lake has a lower proportion of population aged 25 to 64 with no Certificate, Diploma or Degree as their highest level of educational attainment compared to Timiskaming District that proportion is still significantly higher than that of the province.
- Compared to the province, Kirkland Lake and Timiskaming District have a higher percentage of population 15+ with Apprenticeship or Trades Certificate or Diploma.
- The proportion of the prime working age population (25 to 64) with College, CEGEP or other Non-university Certificate or Diploma is significantly higher in Kirkland Lake and in Timiskaming District compared to Ontario which is likely a reflection of the community's capacity for college training.
- The proportion of those with University Certificate, Diploma or Degree for that same age cohort lags far behind that of the province.

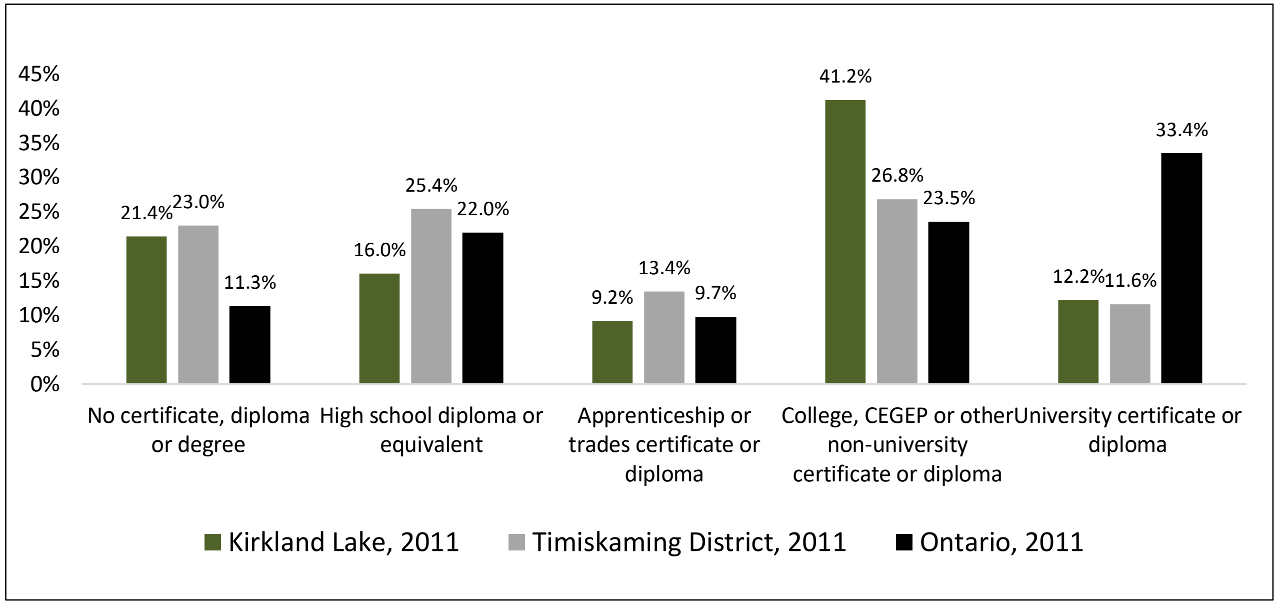
TABLE 12: EDUCATIONAL ATTAINMENT BY AGE GROUP
KIRKLAND LAKE, TIMISKAMING DISTRICT AND ONTARIO, 2011

	K. Lake 2006 %	K. Lake 2011 %	Timiskaming District %	Ontario %
Age cohort 15-24				
No certificate, diploma or degree	60.6	40.1	45.6	34.5
High School Diploma or Equivalent	23.9	36.7	33.5	40.5
Apprenticeship or Trades Certificate or Diploma	2.8	6.8	4.6	2.4
College, CEGEP or other non-university Certificate or Diploma	9.4	10.1	11.1	10.3
University Certificate, Diploma or Degree	3.8	5.8	4.8	12.2
Total	**1,065**	**1,035**	**3,775**	**1,702,345**
Age cohort 25-44				
No certificate, diploma or degree	14.8	11.0	12.4	7.9
High School Diploma or Equivalent	22.0	24.8	26.9	21.8
Apprenticeship or Trades Certificate or Diploma	13.0	13.3	13.0	6.3
College, CEGEP or other non-university Certificate or Diploma	38.4	37.2	33.1	24.8
University Certificate, Diploma or Degree	11.4	13.5	14.7	39.1
Total	**1,890**	**1,735**	**6,740**	**3,357,885**
Age cohort 45-64				
No certificate, diploma or degree	22.0	20.2	24.6	13.8
High School Diploma or Equivalent	25.0	26.3	26.2	26.5
Apprenticeship or Trades Certificate or Diploma	16.0	12.5	13.2	9.1
College, CEGEP or other non-university Certificate or Diploma	23.5	30.0	26.6	22.4
University Certificate, Diploma or Degree	13.2	11.3	9.4	28.2
Total	**2,240**	**2,530**	**10,705**	**3,660,995**
Age cohort 65+				
No certificate, diploma or degree	56.9	45.6	49.1	34.1
High School Diploma or Equivalent	18.7	8.8	15.0	23.4
Apprenticeship or Trades Certificate or Diploma	9.2	14.0	16.0	10.5
College, CEGEP or other non-university Certificate or Diploma	11.0	13.6	9.4	13.7
University Certificate, Diploma or Degree	3.9	18.0	10.6	18.3
Total	**1,415**	**1,360**	**5,825**	**1,752,440**
Total Population 15+	**6,710**	**6,700**	**27,045**	**10,473,665**

Source: Statistics Canada, National Household Survey, 2011; Census 2006

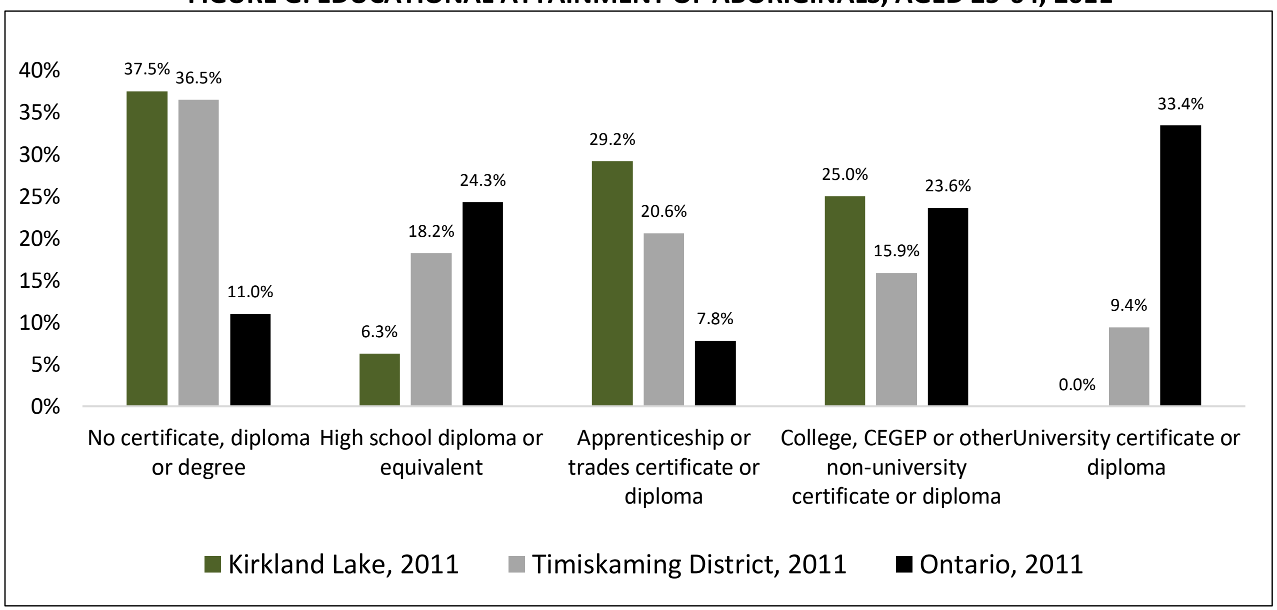
- Educational attainment levels of the Francophone population of Kirkland Lake is lower than that of the Francophone population in Timiskaming District and Ontario in all categories except College, CEGEP or Other Non-university Certificate or Diploma. This is likely attributable to a long standing college presence in Kirkland Lake.

FIGURE F: EDUCATIONAL ATTAINMENT OF FRANCOPHONES, AGED 25-64, 2011



Source: Statistics Canada, National Household Survey, 2011

FIGURE G: EDUCATIONAL ATTAINMENT OF ABORIGINALS, AGED 25-64, 2011



Source: Statistics Canada, National Household Survey, 2011

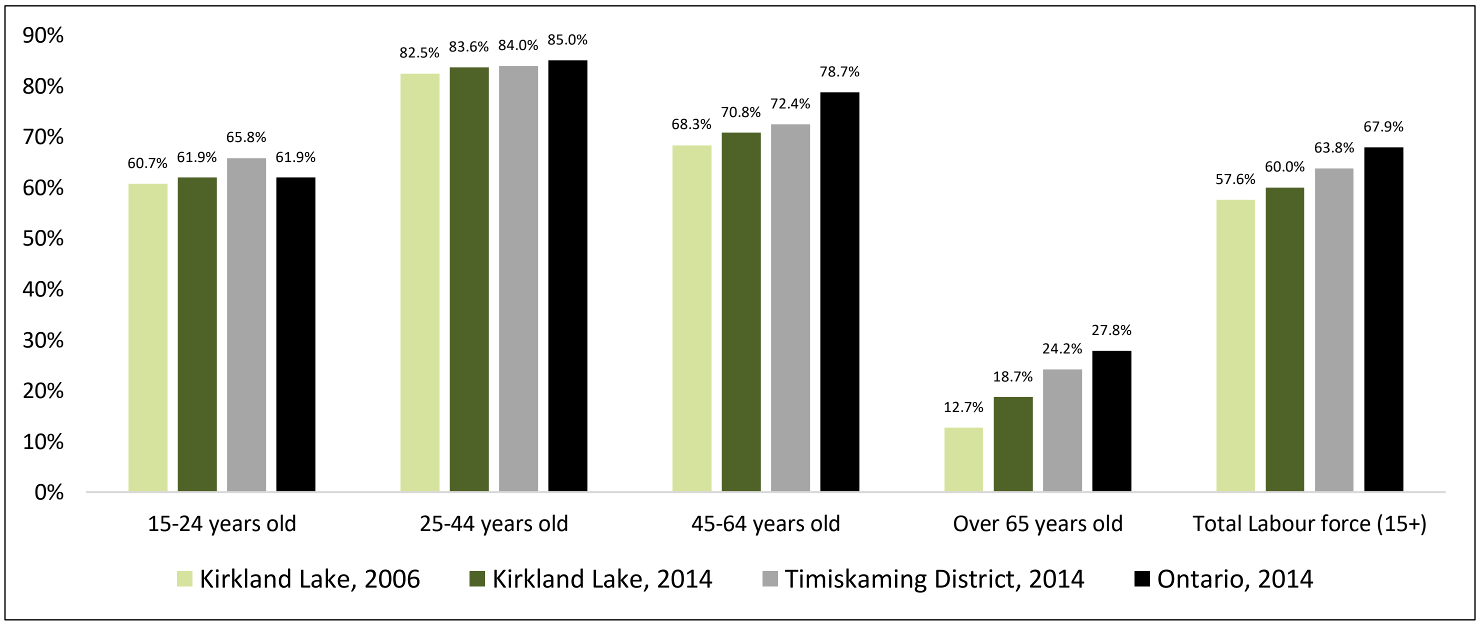
- Compared to that of the Timiskaming District and Ontario, the proportion of Kirkland Lake's Aboriginal population with Apprenticeship or Trades Certificate or Diploma, and those with College, CEGEP or Other Non-university Certificate or Diploma is higher. This is likely reflective of the industrial make-up of the community's economy, and a result of the local capacity for college and apprenticeship training.

7. LABOUR FORCE PARTICIPATION

Understanding the makeup and level of activity of various age cohorts and groups within the local labour market provides important insight and can point to areas where more attention and support are needed to ensure all members of the local labour force can integrate or re integrate the labour market.

In Kirkland Lake, the participation rate of the total labour force increased by 2.4 percentage points between 2006 and 2014. Interestingly, the participation rate of individuals over the age of 65 increased by 6 percentage points between 2006 and 2014.

FIGURE H: PARTICIPATION RATE FOR THE TOTAL LABOUR FORCE (15+), BY AGE GROUPS
KIRKLAND LAKE, TIMISKAMING DISTRICT AND ONTARIO, 2006 AND 2014

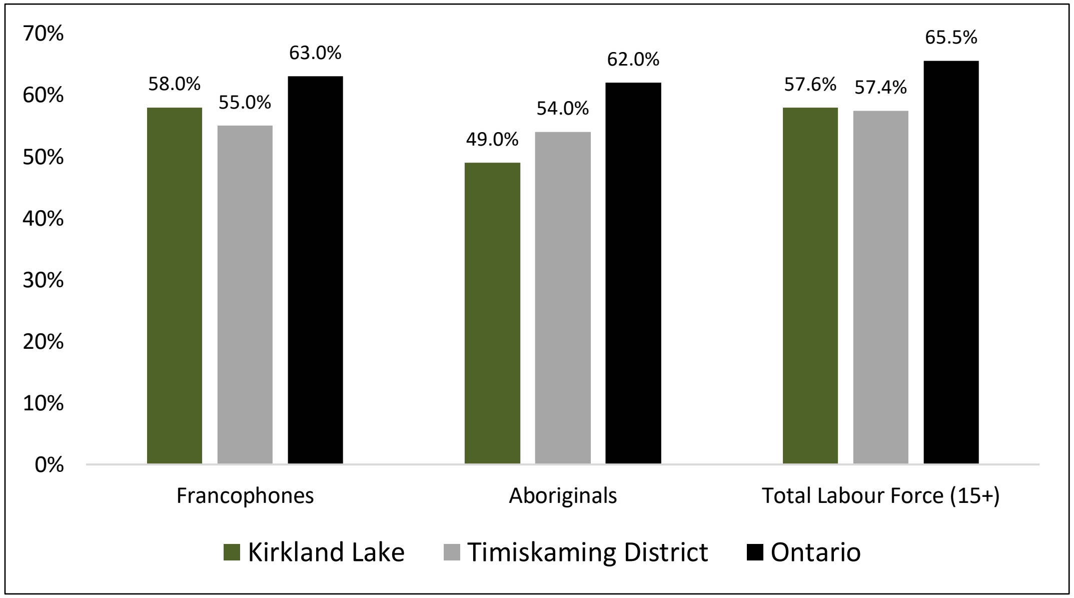


Source: Taxfiler, Kirkland Lake 'City Total', Timiskaming District and Ontario

In Figure I below, we see that at the time of the 2011 Census:

- The participation rate of Francophones in Kirkland Lake was slightly higher that of Francophones in the district, but lower than in Ontario.
- The participation rate of the Aboriginal population was lower in Kirkland Lake than in Timiskaming District or the province.

**FIGURE I: PARTICIPATION RATE FOR FRANCOPHONES, ABORIGINAL AND THE TOTAL LABOUR FORCE (15+)
KIRKLAND LAKE, TIMISKAMING DISTRICT AND ONTARIO
2011**



Source: Statistic Canada, National Household Survey, 2011

LABOUR MARKET <u>SUPPLY</u> INDICATORS – WHAT WE HEARD Kirkland Lake – November 29th, 2016			
INDICATOR 4: POPULATION	**INDICATOR 5: MIGRATION**	**INDICATOR 6: EDUCATION**	**INDICATOR 7: LABOUR FORCE PARTICIPATION**
• This data makes sense. • No challenges or opportunities discussed.	<u>Challenge:</u> • Young people leaving the region for jobs, experience, school. <u>Opportunity:</u> • People return to Kirkland Lake for enjoyment of the north, to raise their family, quality of life, etc. • We should recruit regionally across the north. • Northerners like to stay in the North.	<u>Challenges:</u> • Need additional messaging around job / education labour market needs. • Students (and parents) may have low awareness of local labour market needs and related education requirements. Information about those requirements needs to get to parents and student earlier (e.g. before grade 9). <u>Opportunities:</u> • The increase in the number of high school completion and trades certification may be due in part to policy changes & improved messaging about local employment and educational needs. • Good access to college programs. • Introduce elementary and high school students and parents to various occupations.	<u>Challenges:</u> • We have trained people who lack experience and can't gain employment. • Training programs are not enough to get employment - especially for young employees with limited or no experience (example: a six week heavy equipment program is not enough for an employer to put a newly trained employee on an expensive piece of equipment). <u>Opportunities:</u> • Could employers be paid/supported to "Train their own"?

APPENDIX A: DATA SOURCES

To create this summary labour market indicator analysis, a variety of data and data sources need to be used:

Statistics Canada, Labour Force Survey
Statistics Canada, Canadian Business Counts
Statistics Canada, Census and National Household Survey Data
Statistics Canada, Small Area and Administrative Data Division (Taxfiler)
Local Knowledge:

- Local Labour Market Forecast 2011-2031, FNETB 2014
- 2015 employerone survey, FNETB
- Input from local stakeholders.

Each of the sources on its own does not allow us to get a full-picture of the local labour market conditions. Looking at each indicator using different sources provides a more accurate overview of the local labour market. The data that is available to us is never perfect. It is sometimes dated, sometimes it is more recent but does not cover the exact geographic boundaries that are of particular interest to us. When we understand these limitations and take them into account in our analysis, we are able to nonetheless identify and understand current and future labour market challenges and opportunities. Below is a brief description of the data sources that were used for this exercise as well as some of the limitations of those data sources.

Labour Force Survey:

The Labour Force Survey is used since it is a primary source of employment data for Canada, the provinces, economic regions and major urban areas (Census Metropolitan Areas – CMA). The Labour Force data may include many communities within a large geographic area and is of varying applicability across Ontario. Nevertheless, it provides the most current and localized context for all communities within these areas.

Canadian Business Counts:

Statistics Canada's Canadian Business Counts database identifies the number of business establishments (employers) within a Census Division and Census Sub-division. The database also identifies the number of employers by detailed industry and for nine different employee size ranges.

Data from Canadian Business Counts can serve as a very useful indicator, but they must be interpreted carefully. Although it is not absolutely inclusive, this database, and the indicators derived from it, remains broadly representative – providing insight into, for example, the fact that the number of employers in a specific industry was falling.

Canadian Business Counts data is available every six months (June and December) with an approximate five week time lag for release.

Census Data and National Household Survey Data:

For statistics and information on population, education and occupation, Census Canada and National Household Survey provides highly detailed and reliable data. Moreover, most of the Census and National Household Survey data is available at both larger and smaller geographic areas. It also provides the option of making comparisons between local areas and regional or provincial levels, adding to the 'telling the story' of the local area.

The principal limitation of the Census Data and the National Household Survey Data is that it is available only once every five years and it takes several years before some of the data is actually available. However, it offers a wealth of information that over time provides the most reliable in depth demographic and historical data available.

Statistics Canada, Small Area and Administrative Data Division (Tax Filer):

Statistics Canada, Small Area and Administrative Data Division (Tax Filer) generates a wealth of socio-economic and demographic data derived from personal income tax returns submitted each year by Canadians. Information on the annual migration characteristics both into and out of a Census Division can be found in this database.

Far Northeast Training Board - Local Labour Market Forecast 2011-2031:

Released in March 2014, this report projects anticipated retirements by occupations based on the demographic profile of the workforce at the time of the 2011 Census. Its advantage is that it provides detailed localized information. The information is provided by NOC occupation for each of the Community Futures Development Corporations (CFDC) that are located within the Far Northeast Training Board's catchment area.

Its limitation is that it estimates anticipated retirements based on age alone and does not factor economic shifts in the local area.

Far Northeast Training Board - 2016 employerone survey:

Conducted between October 17th and November 18th, it provides local insight on occupations for which employers have hired in the past 12 months, and those for which they anticipate hiring in the next 12 months.

Its limitation is that it represents a small sample of businesses and is based on the labour market conditions at the time of the data collection.

Local Knowledge:

While the more formal labour market indicator data capture the unique characteristics and circumstances of the community, local knowledge can be very useful in complementing this evidence. Every community has sources of local data and knowledgeable persons who can add valuable insights about the realities of the local labour market.

By its very nature, data is always dated, some more than others. This does not mean that data is not immensely valuable. However, it does not eliminate the need to include local knowledge or intelligence within the community to challenge or validate the data. Often community and business leaders offer more current information and experiences.

For example, local knowledge may indicate that a plant closure is imminent. This suggests that it may be useful to document the effects on the local labour market, and to consider whether help can be extended. Similarly, advance word about a possible arrival of a major new enterprise could also signal that certain indicators should be considered carefully. For example, does the community have the skills that will be demanded by a new or expanding employer?

However, local knowledge must be used carefully because this information is often a combination of factual information, opinions and advice. While these various aspects of local knowledge can be useful, they should not be confused with each other.

APPENDIX B: WORKSHEETS

WORKSHEET 1:
Based on the summary analysis of the labour market **DEMAND** indicators (pages 3 to 11), please list potential implications for the employers, for employees/job seekers, for your community, and for your organization.

	IMPLICATIONS
EMPLOYERS	
EMPLOYEES / JOB SEEKERS	
THE COMMUNITY	

Now list the implications for **your organization**:

WORKSHEET 2:
Based on the summary analysis of the labour market **SUPPLY** indicators (pages 12 to 20), please list potential implications for the employers, for employees/job seekers, for your community, and for your organization.

	IMPLICATIONS
EMPLOYERS	
EMPLOYEES / JOB SEEKERS	
THE COMMUNITY	

Now list the implications for **your organization**:

WORKSHEET 3:

Please give some thought to if/how your organization could help address local labour market challenges and opportunities in your community. Using the following chart, describe your organization's proposed action items/solutions. Please complete one chart per action.

Using the same chart, identify actions at the community level that could help address local labour market challenges.

TREND: *A brief description of a labour market change happening over time based on reliable labour market information (e.g. aging workforce, increase in youth out-migration, etc.).*
ISSUE: *A clear statement of the issue to be addressed - who is being affected and how.*
PROPOSED ACTION: *The action should be practical and achievable and be expressed in plain language*
APPLICABLE COMMUNITY PARTNERSHIP: *The type of partnership that could be used to support the proposed action should be identified.*
APPLICABLE GOVERNMENT PROGRAM/SERVICE: *The program or service that could be used to support the proposed actions.*
LEAD PARTNER(S): *Identify a lead community partner, and any partner(s) who will/can contribute to achievement of the goal.*
TIMELINES: *Wherever possible, please set timelines for action items identified.*
EXPECTED OUTCOMES: *Measurable outcomes, quantitative and then qualitative, are required for each of the action items.* *Example of a measurable outcome statement: Host 3 information sessions for 250 youths and 75 parents to raise their awareness of career opportunities in apprenticeship.*