



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 Temiskaming Shores



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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 Temiskaming Shores, 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 Temiskaming Shores on November 28th, 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.

Sections 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:

- 58.1% of businesses in Temiskaming Shores were businesses with no employees
- Businesses with 1 to 9 employees represented 73.8% (366 businesses) of the total number of SMEs (1 to 99 employees)
- Large businesses of 100+ employees only make up 1.2% of the total number of businesses in Temiskaming Shores.

Change in the Number of Businesses:

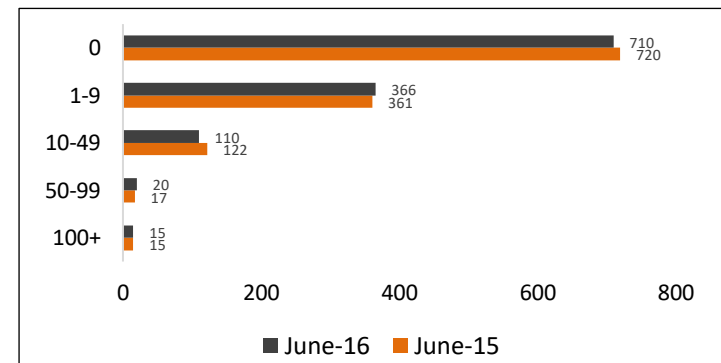
As can be seen in Figure A, Statistics Canada's Business Counts shows little change in the number of businesses between June 2015 and June 2016:

- The number of businesses with no employees dropped by 1.4% or -10 businesses
- Businesses with 1 to 9 employees increased by 1.4% (+5 businesses), businesses with 10 to 49 employees decreased by -9.8% (-12 businesses), while those with 50 to 99 employees experienced a decrease of 3 businesses.
- There was no change in the number of businesses with 100+ employees.

**TABLE 1: NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
TEMISKAMING SHORES, JUNE 2016**

	#	% of total
0	710	58%
1-9	366	30%
10-49	110	9%
50-99	20	2%
100+	15	1%
	1,221	

**FIGURE A: CHANGE IN THE NUMBER OF BUSINESSES
TEMISKAMING SHORES, JUNE 2015 TO JUNE 2016**



Source: Statistics Canada, Canadian Business Counts, June 2015 and 2016

Industrial Composition of Local Businesses:

Table 2 shows that in June 2016:

- Real Estate, Specialty Trade Contractors, and Professional, Scientific and Technical Services were the industries with the largest number of employers. It is important to note that 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 industrial distribution of employers in Temiskaming Shores is very close to that of the district. The difference is more pronounced when comparing to Ontario. For example, there is a larger proportion of employers in Animal Production and Aquaculture in Temiskaming Shores than in the province. On the other hand, there is a smaller proportion of employers in the Professional, Scientific and Technical Services industry in Temiskaming Shores compared to the province.

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

NAICS	0	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+	Total	T. Shores %	Timisk. District %	Ontario %
111 - Crop production	35	3	1	0	0	0	0	0	0	39	3.2	3.6	1.5
112 - Animal production and aquaculture	49	5	1	0	0	0	0	0	0	55	4.5	6.5	1.4
236 - Construction of buildings	21	8	2	4	1	1	0	0	0	37	3.0	3.2	2.9
238 - Specialty trade contractors	32	27	5	1	1	0	2	0	0	68	5.6	5.7	5.3
441 - Motor vehicle and parts dealers	3	4	2	5	2	1	0	0	0	17	1.4	1.3	0.6
445 - Food and beverage stores	7	1	4	1	0	1	2	0	0	16	1.3	1.5	1.0
448 - Clothing and clothing accessories stores	2	10	5	1	0	0	0	0	0	18	1.5	1.0	0.8
453 - Miscellaneous store retailers	11	0	2	3	1	0	0	0	0	14	1.4	1.4	0.7
484 - Truck transportation	36	14	3	4	4	1	0	1	0	63	5.2	4.3	3.2
523 - Securities, commodity contracts, & other financial investment & related activities	21	1	0	0	0	2	0	0	0	24	2.0	1.8	3.2
531 - Real estate	166	14	2	0	1	0	0	0	0	183	15.0	14.0	15.5
541 - Professional, scientific and technical services	36	17	5	9	1	0	0	0	0	68	5.6	5.2	12.6
551 - Management of companies and enterprises	16	1	0	1	0	0	0	0	0	18	1.5	1.5	2.1
561 - Administrative and support services	16	6	6	2	0	2	0	0	0	32	2.6	2.6	3.6
621 - Ambulatory health care services	23	23	7	4	2	0	1	0	0	60	4.9	3.9	4.9
721 - Accommodation services	9	4	1	3	1	0	0	0	0	18	1.5	1.9	0.4
722 - Food services and drinking places	8	8	8	6	7	1	0	0	0	38	3.1	3.3	2.5
811 - Repair and maintenance	22	12	5	1	0	0	0	0	0	40	3.3	2.8	1.8
812 - Personal and laundry services	19	10	2	0	1	0	0	0	0	32	2.6	2.1	1.8
813 - Religious, grant-making, civic & professional & similar	16	9	1	1	0	0	0	0	0	27	2.2	2.1	1.8

Source: Statistics Canada, Canadian Business Counts, June 2016

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:

- Retail trade was the largest source of employment in Temiskaming Shores (21.7% of total employment).
- The Health Care and Social Assistance industry was another large source of employment in Temiskaming Shores (14.5% of total employment).

**TABLE 3: EMPLOYMENT BY INDUSTRY
TEMISKAMING SHORES, TIMISKAMING DISTRICT, ONTARIO, 2011**

		T. Shores 2011	T. Shores Distribution (%)	Timiskaming District Distribution (%)	Ontario Distribution (%)
11	Agriculture, forestry, fishing and hunting	55	1.2	5.8	1.5
21	Mining and oil and gas extraction	215	4.6	7.2	0.4
22	Utilities	40	0.9	1.1	0.9
23	Construction	410	8.8	7.8	6.3
31-33	Manufacturing	350	7.5	7.4	10.4
41	Wholesale Trade	75	1.6	1.4	4.6
44-45	Retail Trade	1,010	21.7	15.5	11.2
48-49	Transportation and warehousing	175	3.8	5.8	4.6
51	Information and cultural industries	80	1.7	1.6	2.7
52	Finance and insurance	95	2.0	2.2	5.5
53	Real estate and rental and leasing	35	0.8	1.2	2.0
54	Professional, scientific and technical services	115	2.5	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	1.3	2.4	4.6
61	Educational services	475	10.2	6.8	7.5
62	Health care and social assistance	675	14.5	13.8	10.4
71	Arts, entertainment and recreation	50	1.1	0.8	2.2
72	Accommodation and food services	245	5.3	5.3	6.3
81	Other services (except public administration)	250	5.4	4.9	4.4
91	Public administration	235	5.0	6.9	6.9
	All industries	4,655	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

**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.*

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

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 Temiskaming Shores (25.7%) as is the case in the Timiskaming District (22.2%) and in Ontario (23.2%).
Employment in Trade, Transport and Equipment Operators and Related Occupations is higher in Temiskaming Shores and in the Timiskaming District (19.8% and 21.4% respectively), compared to 13.0% in Ontario, which is reflective of the industrial and natural resource based nature of the local economy.

**TABLE 5: EMPLOYMENT BY OCCUPATION
TEMISKAMING SHORES, TIMISKAMING DISTRICT, ONTARIO, 2011**

		Temiskaming Shores Labour Force 2011	Temiskaming Shores Distribution %	Timiskaming District Distribution %	Ontario Distribution %
	Total	4,655	100.0	100.0	100.0
0	Management occupations	385	8.3	9.5	11.5
1	Business, finance and administration occupations	570	12.2	12.3	17.0
2	Natural and applied sciences and related occupations	180	3.9	4.5	7.4
3	Health occupations	370	7.9	6.9	5.9
4	Occupations in education, law and social, community and government services	655	14.1	11.6	12.0
5	Occupations in art, culture, recreation and sport	70	1.5	1.5	3.1
6	Sales and services occupations	1,195	25.7	22.2	23.2
7	Trade, transport and equipment operators and related occupations	920	19.8	21.4	13.0
8	Natural resources, agriculture and related production occupations	125	2.7	6.5	1.6
9	Occupations in manufacturing and utilities	175	3.8	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%), which is reflective of 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 South Timiskaming Community Futures Development Corporation. It highlights the occupations in South Timiskaming 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
SOUTH TIMISKAMING CFDC, 2011-2031**

	South Temiskaming
0 – Management	515
00 – Senior Management Occupations	40
01-05 – Specialized Middle Management Occupations	95
06 – Middle Management Occupations in Retail and Wholesale Trade and Customer Services	155
07-09 – Middle Management Occupations in Trades, Transportation, Production and Utilities	225
1 - Business, Finance and Administration Occupations	460
11 – Professional Occupations in Business and Finance	30
12 – Administrative and Financial Supervisors and Administrative Occupations	220
14 – Office Support Occupations	165
15 – Distribution, Tracking and Scheduling Co-Ordination Occupations	45
2 – Natural and Applied Sciences and Related Occupations	270
21 – Professional Occupations in Natural and Applied Sciences	40
22 – Technical Occupations in Natural and Applied Sciences	230
3 – Health Occupations	75
34 – Assisting Occupations in Support of Health Services	75
04 – Occupations in Education, Law and Social, Community and Government Services	330
40 – Professional Occupations in Education Services	170
41 – Professional Occupations in Law and Social, Community and Government Services	65
44 – Care Providers and Educational, Legal and Public Protection Support Occupations	95
6 – Sales and Service Occupations	725
62 – Retail Sales Supervisors and Specialized Sales Occupations	20
63 – Service Supervisors and Specialized Service Occupations	160
64 – Sales Representatives and Salespersons – Wholesale and Retail Trade	240
67 – Service Support and Other Service Occupations	305
7 – Trades, Transport and Equipment Operators and Related Occupations	785
72 – Industrial, Electrical and Construction Trades	230
73 – Maintenance and Equipment Operation Trades	180
75 – Transport and Heavy Equipment Operation and Related Maintenance Occupations	375
8 – Natural Resources, Agriculture and Related Production Occupations	65
84 – Workers in Natural Resources, Agriculture and Related Production Occupations	65
9 – Occupations in Manufacturing and Utilities Occupations	90
94 – Processing and Manufacturing Machine Operators and Related Production Workers	90

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 Sales and Service Occupations, and Trades, Transport and Equipment Operators and Related.

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

Source: Local Labour Market Forecast 2011-2031

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

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

Temiskaming Shores – November 28th, 2016

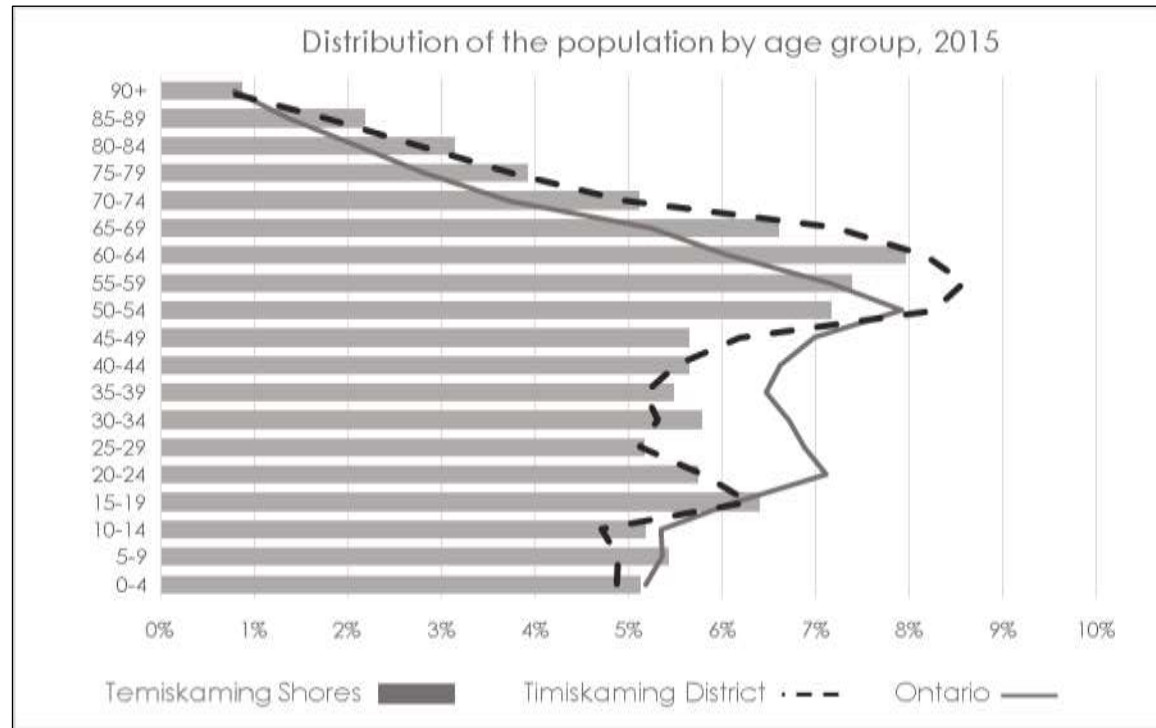
INDICATOR 1: NUMBER OF BUSINESSES	INDICATOR 2: EMPLOYMENT BY INDUSTRY	INDICATOR 3: EMPLOYMENT BY OCCUPATION
<p>Comment: The indicator data makes sense</p>	<p>Comment: The indicator data makes sense</p> <p><u>Challenges:</u></p> <ul style="list-style-type: none"> • Employers face competition from various sectors (e.g. agriculture competes with mining) for employees • Wage wars to keep employees • There have been several school closures since 2011 	<p>Comment: The indicator data makes sense</p> <p><u>Challenges:</u></p> <ul style="list-style-type: none"> • Seeing employers with lower-paying, part-time jobs find these are hard to fill; or have high turnover and employees need to do lots of training • Employers have many positions that require high skill/education are vacant <p><u>Opportunities:</u></p> <ul style="list-style-type: none"> • Employers may need to provide additional training for some positions if employees lack education or skills. Training programs might need to be flexible to meet employer training needs • Community may need additional affordable housing for those with low-wage jobs

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 effect on local labour markets.

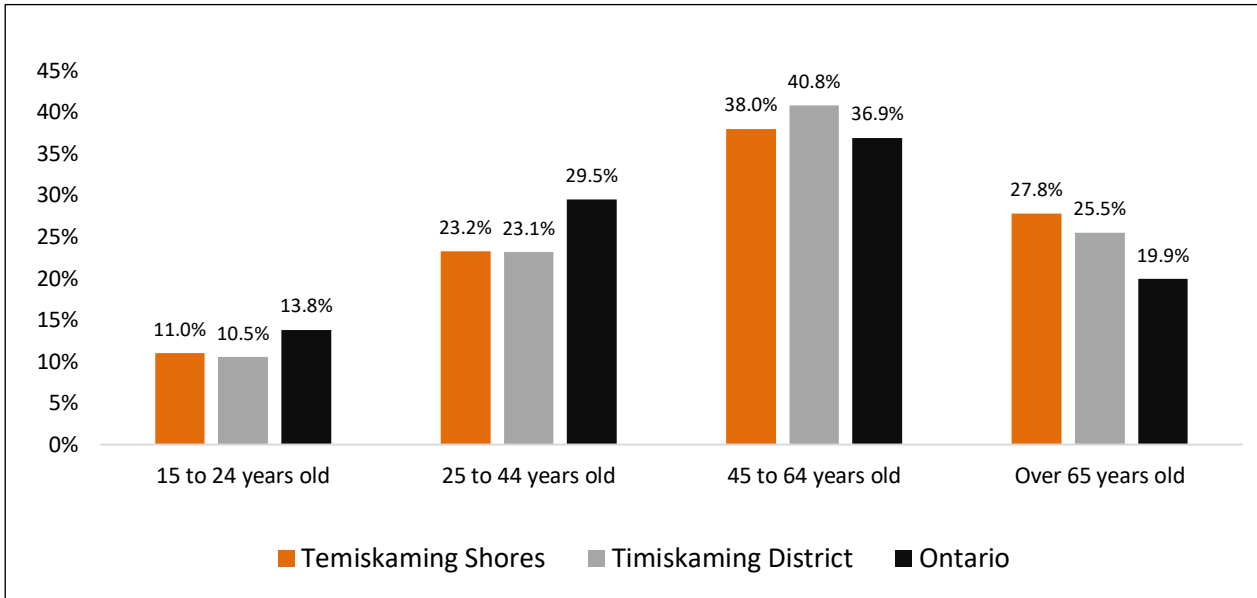
**FIGURE B: DISTRIBUTION OF THE POPULATION BY AGE COHORT
TEMISKAMING SHORES, TIMISKAMING DISTRICT AND ONTARIO, 2015**

- The proportion of individuals over the age 55 is higher in Temiskaming Shores than in the province
- The proportion of those in the prime working age population (20 to 49) however is lower in Temiskaming Shores than in Ontario.
- The age distribution of Temiskaming Shores' population is similar to that of the district.



Source: Statistics Canada, Estimates of population

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

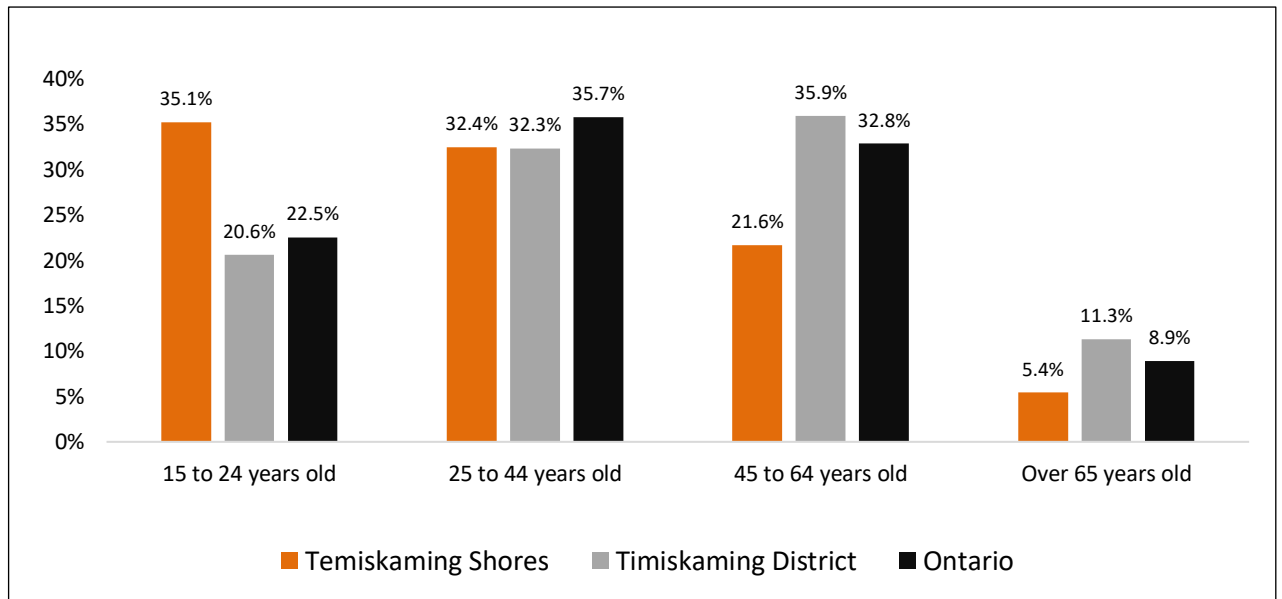


The age distribution of the Francophone population in Temiskaming Shores is close to that of Timiskaming district

When compared to Ontario we observe that we have a population that is slightly older than that of Ontario.

Source: Statistics Canada, Census 2011

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



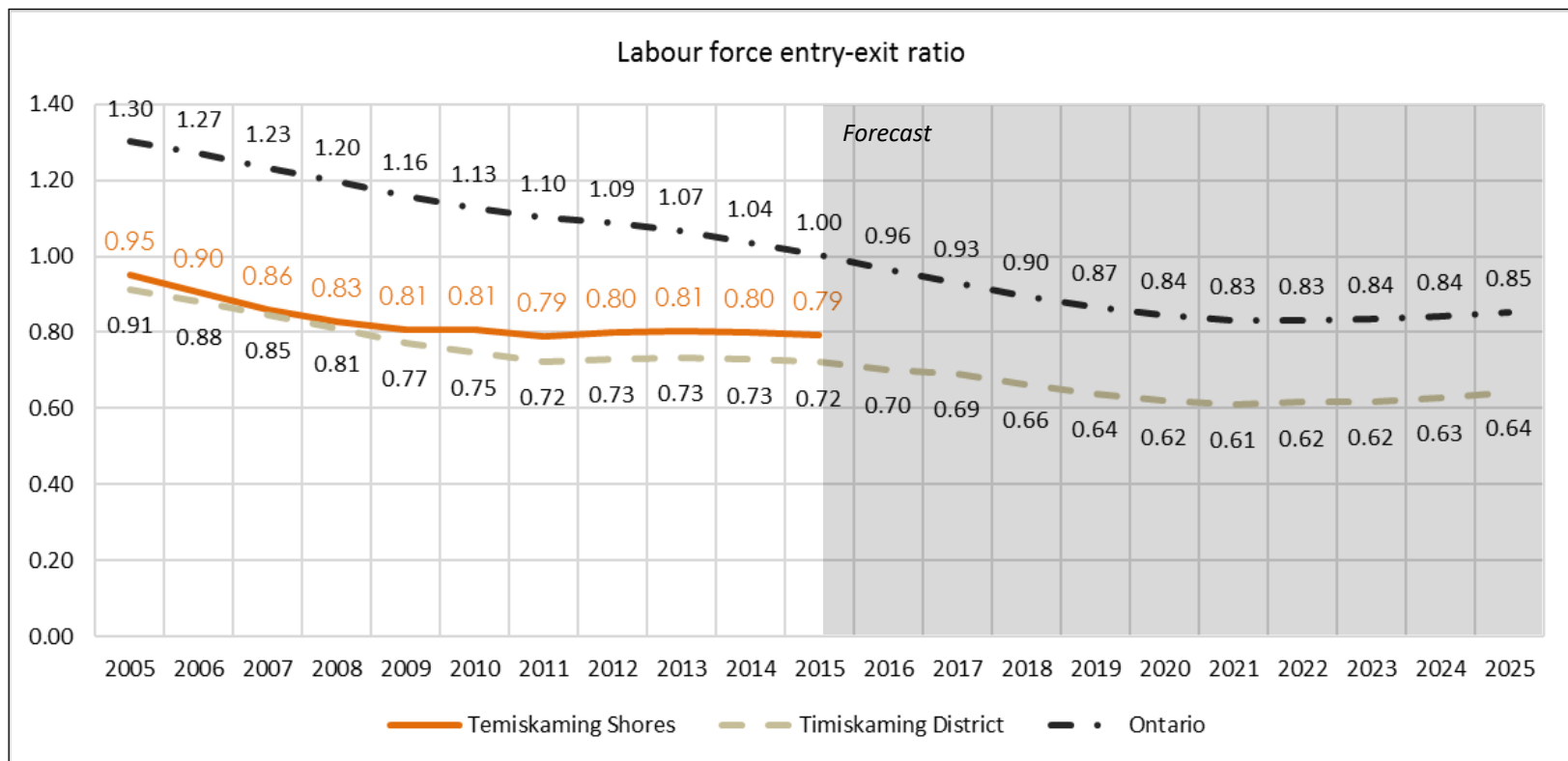
Compared to the Timiskaming District and to the province, the Aboriginal population in Temiskaming Shores has a significantly higher proportion of youth aged 15 to 24.

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 Temiskaming Shores, the ratio of 0.79 in 2015 indicates that there are not enough workers entering the labour market to ensure that all those retiring will be replaced.

**FIGURE E: LABOUR FORCE ENTRY-EXIT RATIO
TEMISKAMING SHORES, 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.

Note: 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	1,094	-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 Ontario.

**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:

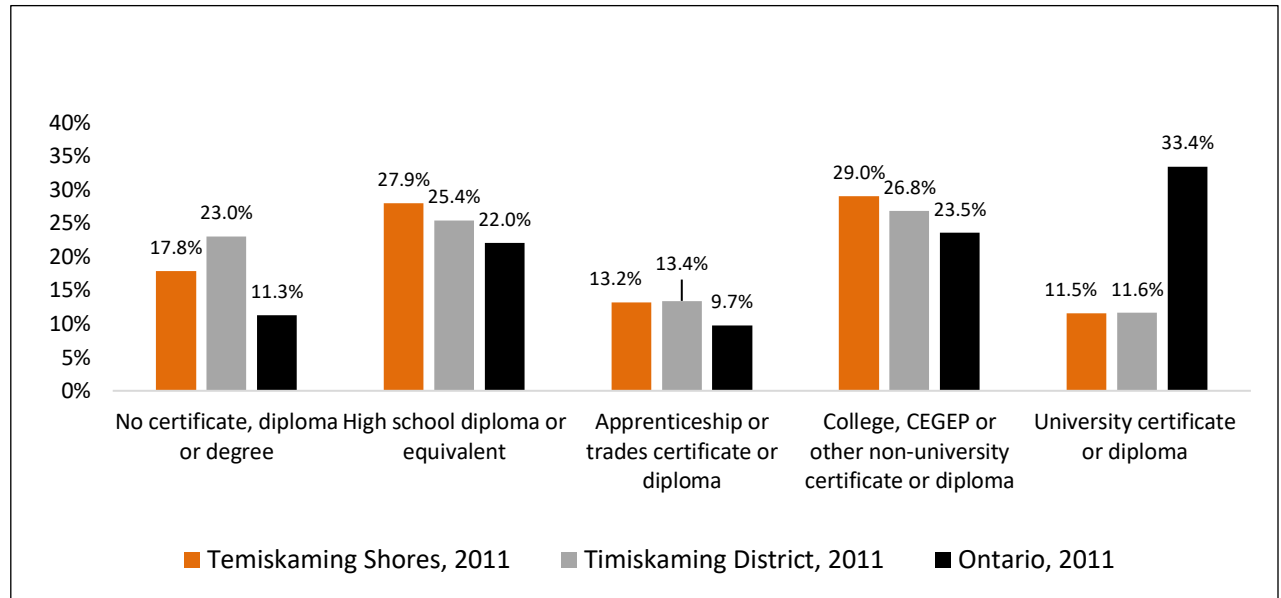
- Although Temiskaming Shores has a lower proportion of population aged 25 to 64 with no Certificate, Diploma or Degree, or with High School Diploma or Equivalent as their highest level of educational attainment, that proportion is still significantly lower than that of the province.
- Compared to the province, both Temiskaming Shores and Timiskaming District have a higher percentage of population 15+ with Apprenticeship or Trades Certificate or Diploma, and College, CEGEP or Other Non-university Certificate or Diploma. This is likely attributable to the industrial make-up of the region, and to the existing capacity within the region for training college graduates and apprentices.
- Although lower than the province, the percentage of the population 15+ with University Certificate, Diploma or Degree is higher in Temiskaming Shores than in the Timiskaming District, in all age cohorts except the 65+.

**TABLE 12: EDUCATIONAL ATTAINMENT BY AGE GROUP
TEMISKAMING SHORES, TIMISKAMING DISTRICT AND ONTARIO, 2011**

	T. Shores 2006 %	T. Shores 2011 %	Timiskaming District %	Ontario %
Age cohort 15-24				
No certificate, diploma or degree	46.3	48.0	45.6	34.5
High School Diploma or Equivalent	32.4	29.0	33.5	40.5
Apprenticeship or Trades Certificate or Diploma	0.8	4.0	4.6	2.4
College, CEGEP or other non-university Certificate or Diploma	13.5	11.1	11.1	10.3
University Certificate, Diploma or Degree	6.6	7.9	4.8	12.2
Total	1,295	1,260	3,775	1,702,345
Age cohort 25-44				
No certificate, diploma or degree	9.7	10.4	12.4	7.9
High School Diploma or Equivalent	27.2	26.0	26.9	21.8
Apprenticeship or Trades Certificate or Diploma	11.7	13.3	13.0	6.3
College, CEGEP or other non-university Certificate or Diploma	36.2	31.7	33.1	24.8
University Certificate, Diploma or Degree	14.9	18.3	14.7	39.1
Total	2,515	2,210	6,740	3,357,885
Age cohort 45-64				
No certificate, diploma or degree	25.0	17.5	24.6	13.8
High School Diploma or Equivalent	24.8	29.2	26.2	26.5
Apprenticeship or Trades Certificate or Diploma	14.5	13.9	13.2	9.1
College, CEGEP or other non-university Certificate or Diploma	19.6	27.6	26.6	22.4
University Certificate, Diploma or Degree	15.9	11.6	9.4	28.2
Total	3,135	3,060	10,705	3,660,995
Age cohort 65+				
No certificate, diploma or degree	53.2	49.1	49.1	34.1
High School Diploma or Equivalent	14.3	16.6	15.0	23.4
Apprenticeship or Trades Certificate or Diploma	13.8	14.2	16.0	10.5
College, CEGEP or other non-university Certificate or Diploma	7.4	9.8	9.4	13.7
University Certificate, Diploma or Degree	10.5	9.8	10.6	18.3
Total	1,815	1,895	5,825	1,752,440
Total Population 15+	8,760	8,425	27,045	10,473,665

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

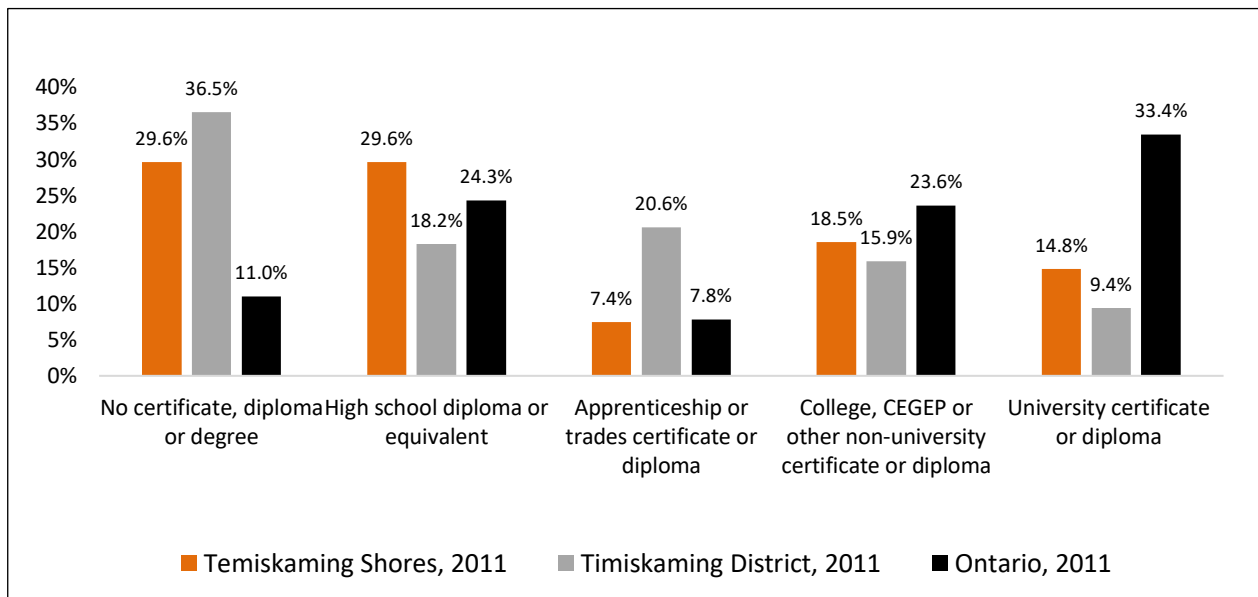
FIGURE F: EDUCATIONAL ATTAINMENT OF FRANCOPHONES, AGED 25-64, 2011



Source: Statistics Canada, National Household Survey, 2011

- Educational attainment levels of the Francophone population of Temiskaming Shores is slightly higher than that of the Francophone population in the district. It is however significantly lower when compared to Ontario.

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



Source: Statistics Canada, National Household Survey, 2011

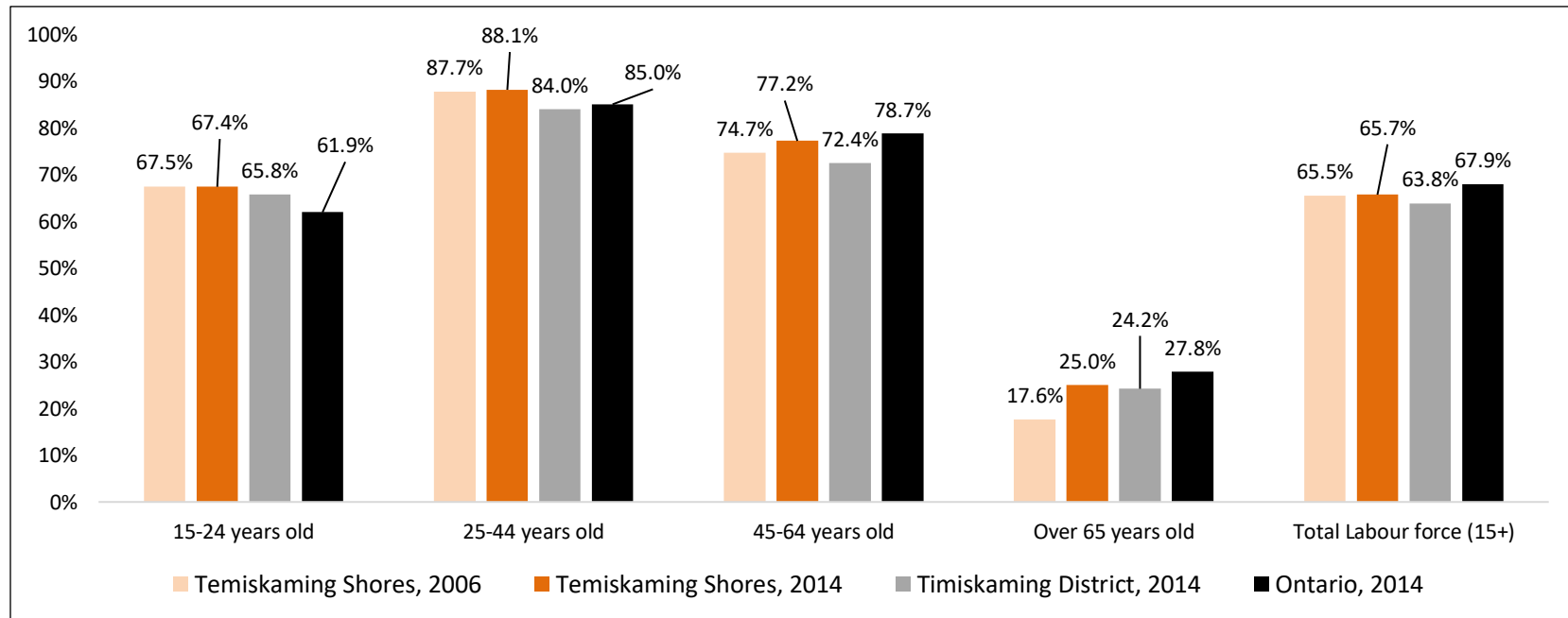
- Compared to that of the district, the educational attainment levels of the Aboriginal population of Temiskaming Shores is higher in all categories except Apprenticeship or Trades Certificate or Diploma.
- In all categories except High School Diploma or Equivalent it is much lower than that of Ontario.

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.

The participation rate of the total labour force remained relatively stable between 2006 and 2014. Interestingly, the participation rate of individuals over 65 years of age increased by 7.4 percentage points during that period.

**FIGURE H: PARTICIPATION RATE FOR THE TOTAL LABOUR FORCE (15+), BY AGE GROUPS
TEMISKAMING SHORES, TEMISKAMING DISTRICT AND ONTARIO, 2006 AND 2014**

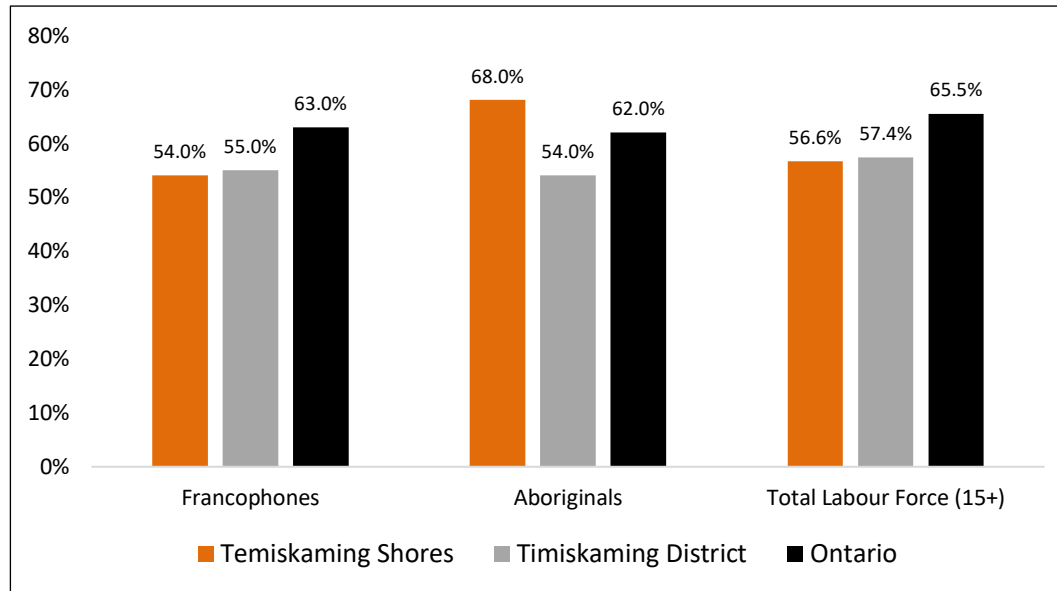


Source: Taxfiler, Temiskaming Shores Census Agglomeration, Timiskaming District and Ontario

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

- The participation rate of Francophones in Temiskaming Shores was similar to that of Francophones in the district, but lower than that of Francophones in Ontario.
- The participation rate of the Aboriginal population was higher in Temiskaming Shores than in Timiskaming District or the province.

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



Source: Statistic Canada, National Household Survey, 2011

LABOUR MARKET SUPPLY INDICATORS – WHAT WE HEARD

Temiskaming Shores – November 28th, 2016

INDICATOR 4: POPULATION	INDICATOR 5: MIGRATION	INDICATOR 6: EDUCATION	INDICATOR 7: LABOUR FORCE PARTICIPATION
<p><u>Challenge:</u></p> <ul style="list-style-type: none"> Community may need to attract new residents (e.g. getting youth to return or attract new residents) to fill certain occupations. Recruit workers to the Timiskaming area from Quebec. 	<p><u>Challenges:</u></p> <ul style="list-style-type: none"> It's normal for youth to want new experiences, away from home. Seeing competition in the North for employees. <p><u>Opportunities:</u></p> <ul style="list-style-type: none"> Can the North collaborate to: <ul style="list-style-type: none"> Attract NEW people to the North? To keep youth in the North? Can we communicate better about the jobs available in the North? Can we do a better job of sharing our evidence and data within the North? Can immigration help match labour demand and supply? Starting to see migrant workers at area farms. Seeing new immigrants buying businesses in area. Help newcomers become involved in the community to help connect them to employment. 	<p><u>Challenges:</u></p> <ul style="list-style-type: none"> Area has limited educational options (e.g. no Masters programs, limited program offerings). Concern about falling High School graduation rates; will this trend continue in the next data release? Older workers are competing with better educated, younger workers. Poor alignment of Ontario / Quebec education and training, certification. 	<p><u>Challenges:</u></p> <ul style="list-style-type: none"> Low awareness of local labour market challenges, changes, opportunities. We have a hidden job market. High turnover in retail & lower paying jobs. Can be hard to find jobs in this area; jobs are not always posted or are awarded informally to friends and family. Older population is working longer, seeking to work longer. Do some younger workers not want to work, especially for low wages? <p><u>Opportunities:</u></p> <ul style="list-style-type: none"> We need better messaging around area job opportunities from employers to parents, students. Encourage entry level and retail employees to look at career opportunities in the region; match them with education and full time jobs.

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 employere 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 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 employere 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, 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, 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: <i>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.).</i>
ISSUE: <i>A clear statement of the issue to be addressed - who is being affected and how.</i>
PROPOSED ACTION: <i>The action should be practical and achievable and be expressed in plain language</i>
APPLICABLE COMMUNITY PARTNERSHIP: <i>The type of partnership that could be used to support the proposed action should be identified.</i>
APPLICABLE GOVERNMENT PROGRAM/SERVICE: <i>The program or service that could be used to support the proposed actions.</i>
LEAD PARTNER(S): <i>Identify a lead community partner, and any partner(s) who will/can contribute to achievement of the goal.</i>
TIMELINES: <i>Wherever possible, please set timelines for action items identified.</i>
EXPECTED OUTCOMES: <i>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.</i>