

Executive Summary

The need for timely and accurate labour market information is critical in the development of a healthy and durable labour market. Decisions regarding programming, planning, resource allocation and community development are all based on labour market information that helps to describe prevailing demographic, wage, education and skill levels.

The chief undertaking of this project was to contribute timely and localized labour market information relevant to understanding the existing level of skills in Bruce and Grey Counties. This information was gathered with the intention of informing the process of decision making and providing future linkages to assist those decision making bodies responsible for training, education and employer needs in these counties.

The need for this information arises from a labour market consistently in a state of flux. The push for customized and well-timed labour market information came from a number of interested parties allied under the banner of the Bruce Grey Huron Perth Georgian Triangle Training Board.

There were four major components of the project: labour market profile, high school survey, employee survey and employer survey.

Methods

The **labour market profile** was compiled using data from the 1996 and 2001 Statistics Canada Population Census and Census of Agriculture. To illustrate the various population and labour features of the two counties, tables and graphs were prepared from the analysis of Census data. The profile features comparisons between Bruce County and Grey County and the Province of Ontario. Information is also provided at the town/township level where relevant.

The **high school survey** was administered to all thirteen high schools in the region - eleven from the Bluewater District School Board (BDSB) and two from the Bruce-Grey Catholic District School Board (BGCDSB). In consultation with the project Steering Committee the research team selected a paper questionnaire to be mailed out to each high school and administered by teachers as the most effective survey method.

There were a number of information requirements that influenced design of the high school survey instrument. The first was to focus upon the existing skills of the target population so as to gauge the current skill levels of youth. Secondly, respondents' plans for developing their skills through future education were central. The third category was to examine the respondent's expectations regarding a future career, including both the type of employer he or she anticipates working for and the type of occupation they hope to have. A fourth category was to determine the intentions of youth concerning their future place of employment and residence. Finally, it was concluded that basic demographic information must be collected including gender and high school.

In order to achieve statistically significant survey results an appropriate sampling strategy was devised. Based upon the interests of the steering committee, it was decided that the target group should include grade ten, grade eleven, and grade twelve students of all ranges. Cluster sampling was pursued by dividing each population into exhaustive and mutually exclusive groups based upon a set of standard classes that each student must take to complete high school. These clusters were Civics class for grade ten students and English class for grade eleven and twelve students. Weightings were given to each high school to account for the proportional differences among the thirteen high schools.

The **employee survey** was conducted via a telephone interview with the general population of Bruce and Grey Counties. Eligibility for the survey was restricted to individuals who met the following criteria: permanent resident of either Bruce or Grey County, were legally permitted to work in Canada, over 16 years of age and not retired.

The main focus of the project was to gather labour market information at the county level for Bruce and Grey. Under guidance from the steering committee, Bruce and Grey were further disaggregated into five distinct sub-regions so that more localized labour market information could be obtained in certain categories. These sub-regions were:

- Bruce In-Land
- Bruce Shoreline
- Bruce Peninsula
- Grey In-Land
- Georgian Bay

Design of the survey instrument was focused on meeting the project terms of reference. Specifically, this meant a concentration on information gathering in three main areas: skills, training and education. These principal areas were then supplemented with information on demographics, mobility and employment history. Secondly, there was a need to design the instrument in a manner that would allow for comparison with the other two surveys in the project, the high school and employer survey. A final consideration was the need to collect data in a manner that was consistent with the parameters needed for an interactive web tool.

Potential participants for the survey were selected according to a randomized calling strategy. The unit of analysis for the sample was the household. Any participant within the household that met the survey eligibility requirements (outlined above) was asked to participate. This strategy was constructed using a sample frame derived from Census Canada data. Population levels from Census subdivisions were extracted according to the boundaries of the sub-regions defined by the Steering committee. These populations were then adjusted to reflect the labour market participation rate's provided within the Census. A final number was arrived at for the size of the labour market in each sub-region as well as in each county.

The main focus of the **employer survey** was to gather labour market information at the county level for Bruce and Grey. Interest was also expressed by the steering committee to understand in greater detail the labour requirements of the top 100 employers in the two counties.

Design of the employer survey was very similar to the employee survey. Foremost in the design process was an adherence to the information requirements outlined in the project terms of reference. The principal areas of analysis, skills, training and education was supplemented with information on the employer's current workforce, the employer's future skill requirements, and the employer's ability to retain required transferable skills. As well, comparison with the other surveys and meeting the conditions for an interactive web tool were research requisites.

There were two components to the employer's survey. The first component was the surveying of a random sample of employers in Bruce and Grey Counties. These surveys were conducted using a telephone interview. Employers for the survey were selected according to a randomized calling strategy from a comprehensive list of employers provided by the Steering Committee partners, the Bruce Community Futures Corporation and the Saugeen Economic Development Corporation. The second component was the in-person interviewing of the top 100 employers. Three senior researchers conducted personal interviews with employers that were willing to participate in the survey from September to November.

Draft versions of all three surveys were reviewed and approved by the steering committee. Additionally, all surveys underwent a pre-test with sample target groups.

Response Rate and Respondent Profile

A total of 929 surveys were completed for the **high school survey**. The *response rate* varied according to grade level as follows: grade 10 – 347 completed surveys with a response rate of 81%, grade 11 – 288 completed surveys with a response rate of 72% and grade 12 – 294 completed surveys with a 76% response rate. The *respondent profile* shows an even split between male, 48%, and female, 52%, respondents.

The **employee survey** generated 900 completed surveys. The *response rate* after a total of 8,436 phone calls was 21.2%. The *respondent profile* shows a more uneven split for gender with 37.5% of respondents male and 62.5% of respondents female.

The **employer survey** finished with 404 surveys completed; 368 with small to medium sized businesses and 36 interviews with the top 100 employers in the region. The *response rate* overall was 17.8% with a total of 2,266 phone calls made.

Findings

The **labour market profile** was helpful in articulating a broad picture of the labour market setting for Bruce-Grey:

- Higher proportion of males and females in the 45 years and over age group and a much lower proportion of males and females in the 20-25 and 25-44 year old primary working age group compared to the province.

- A reduced number of young families due to out-migration of the younger members of the work force resulting in a lower representation of the 0-4 age group than the province with implications for future growth in the counties.
- A large retirement age population given the attraction of retirement residence in the communities near the shores of Lake Huron and Georgian Bay.
- The average family income for Ontario (\$73,849) as a whole was considerably higher than county averages in Bruce (\$62,972) and Grey (\$60,974) in 2001.
- Compared to the province relatively fewer people in Bruce and Grey have completed higher levels of formal education. The percentage of the Ontario population that received a degree from University is almost twice the percentage reported in Bruce and Grey.
- Based on 2001 Location Quotient calculations, the economy of Bruce County is specialized in several industrial sectors including Utilities, Agriculture, and Construction while the economy of Grey County is specialized in Agriculture and Construction.
- Distinct gender differences were identified in fields of study, work force employment sectors and labour market participation.

The body of findings from the **high school survey** point to a number of key areas that warrant attention:

- At each grade Bruce-Grey students report adequate achievement in the core subjects of English, Math and Science.
- High participation rates in technological education courses.
- Much lower rates of enrolment are reported for Business Studies and Computer Studies classes signifying a possible lack of development of corresponding financial, clerical, administrative, and particularly computer skills.
- A high incidence of volunteer activity is reported but at low levels of hours per year.
- One of the clear strengths of Bruce-Grey youth as identified by this survey is their participation in part-time and summer employment which provides invaluable workplace experience.
- A significantly low number of students reported taking a co-operative education class.
- Survey results reveal consistent differences reported between gender across the three grade levels.
- Males are also less likely to pursue a university education preferring college instead, while females are more equally balanced between university and college with little interest in trade schools.
- A disconcerting trend is revealed by the survey findings of high intended youth out-migration from the region. There are several industry categories where significant differences are reported between those intending to stay or leave, suggesting the need for development in certain industry areas to promote greater youth retention.

Selected findings from the **employee survey** follow:

- Retirement is an influential factor in all of the sub-regions in the next five years with the notable exception of males in Bruce In-Land.
- Compared to provincial averages the number of respondents who speak a language other than English is low.
- In Bruce County 48% of respondents did not participate in any upgrading activities. The figure was markedly lower in Grey County where 66% of respondents engaged in no upgrading of education or training in the last year.
- A distinct difference between male and female underemployment perceptions was found with female respondents in all sub-regions perceiving higher underemployed rates more often than male respondents.
- The large majority of respondents felt either satisfied or very satisfied with their current occupation.
- The *top three skills* assessed by mean responses in both Bruce and Grey are:
 - verbal
 - reading
 - social/interpersonal skills
- Skill areas *cited as weak* in Bruce and Grey were:
 - computer
 - math skills
 - artistic/creative
- Skills that also *could be improved upon* as perceived by respondents were:
 - written communication
 - teamwork
 - organizational skills
- Trends that materialize from the data are relatively *strong correlations* exist *between education and skill levels* for:
 - Reading
 - Written
 - Computer
 - Verbal
 - Mathematics
- Those skills that demonstrate *weaker relationships* between *education and skills levels* are:
 - Social/Interpersonal
 - Organizational
 - Teamwork
- *No relationship* exist between education and skills level for:
 - Mechanical/Physical
 - Artistic/Creative
- *Male respondents* perceived their skills as more advanced in:
 - Teamwork
 - Mathematics
 - Mechanical/Physical
 - Computer Spreadsheets

- *Female respondents* were more apt to find their skills superior in the following categories:
 - Verbal
 - Artistic/Creative
 - Organizational
 - Computer Word Processing
- The ranking of the mean responses for skills in each of the sub-regions produced the following standing:
 - Bruce In-Land
 - Bruce Peninsula
 - Bruce Shoreline
 - Grey In-Land
 - Georgian Bay

This sample of employers in the area yielded a number of findings:

- The divergence between quality of workforce and availability of workforce was most marked in the construction, manufacturing and finance industry categories.
- The majority, 83%, of employers indicated they did not have a great deal of difficulty finding employees, while 16% said they did.
- Some employers (18%) thought the school board was very good at providing a qualified workforce. The majority, 60% thought they were providing a good workforce and 10% thought they were providing an average workforce. Only 8% and 4% thought they were poor or very poor at providing a qualified workforce.
- The employers surveyed indicated that they (59%) did not provide employee training past the initial training period.
- There were 23% of employers that thought their business would grow, however when asked about the number of positions that the business would increase by, there were only 81 new positions to be added by businesses across all industries.
- The manufacturing and public administration industries exhibited the greatest expansion of their workforce in the next five years.
- The quality of the workforce was ranked as most important critical success factor in the future for area employers.
- Several of the largest employers in the utilities and manufacturing sectors indicated that their retirement rates could be between 40-50% in the next five years. This could lead to upwards of 1,500 new, highly paid skilled trade positions, which will be available to local residents.
- The *top three most important skills* assessed by responses by employers in all industry sectors are:
 - Customer service (327 employers)
 - Verbal (322 employers)
 - Math (254 employers)

- Employers indicated that the quality and stability was high, however the quantity and availability of the management staff was low. Utilities, agriculture and public administration are examples of industries where this issue was especially problematic.
- The three *most difficult skills to obtain* were:
 - Decision making (265 employers)
 - Customer service (226 employers)
 - Team Work (138 employers)
- Most employers were aware of the mentoring/co-op placement programs offered by the high schools, however many would not participate because of the timing of the program or they did not feel they could offer much in the way of training.

Recommendations

From the above conclusions a set of 11 recommendations has been put together by the project team to move the findings of this report forward. These recommendations seek to bring the project findings to a position whereby they can be integrated into the various decision making arenas.

1. It is recommended that gender be used as a criterion in any type of skills programming. Incorporating gender as a variable in skills training will allow organizations to capitalize on existing gender specific strengths and configure programs to address gender specific weaknesses.
2. It is recommended that local employers establish a management training program across various industries and occupations. Such programs will target area youth in an attempt to establish a pool of potential management talent. Securing talent early in the process, by offering the opportunity for a management position, will allow for the cultivation of local management capacity.
3. It is recommended that local school boards and industry communicate more effectively the range of job opportunities in the area. The survey revealed that a large number of high school students are leaving because of a perceived lack of jobs available locally. However, it needs to be made clear to area youth that the employment rates for youth in the area are as high as in urban areas.
4. It is recommended that community partners prepare the workforce for positions opening in the utility sector. The focus on identifying occupations that are in demand and preparing local employees accordingly (i.e. – skills and education upgrading, additional occupation specific training) will enable the local workforce to capitalize on these openings. By targeting the industry specifically, the gains will be locally retained.
5. It is recommended that local business organizations and the Bluewater District and Bruce Grey Catholic District School Board seek further dialogue to support partnerships that allow for labour market experience via co-operative placements for high school students.

The present discontinuity between school year and business cycle will necessitate alternative forms of co-operative programming. The links between employers and students should also be strengthened by other ventures including classroom visits, career fairs, mentoring, job shadowing and industry tours.

6. It is recommended that increased efforts are made by: A) the training board, B) adult education groups, and C) all learning networks to raise computer skill levels for both high school students and current labour force participants. This can be achieved by augmenting existing programs in addition to increasing community awareness about existing computer training programs.
7. It is recommended that all three levels of government be mobilized to invest in adult education. The rapid pace of change in the labour market means that continuous learning activities must become a keystone of local labour market interventions. Where such continuous learning should be concentrated is on the set of transferable skills outlined by this report.
8. It is recommended that economic development organizations in their recruiting efforts, accentuate the intangible qualities of living in the Bruce-Grey region. These 'intangibles' were found to be a influential part of an employee's future planning and thus, promotion of such 'quality of life' factors can be a powerful vehicle for attracting talent to the area.
9. It is recommended that there is a harmonization of regional community economic development efforts among government agencies, community future corporations and other economic development agencies. Attempts should be made to reduce overlap in the collection of information so as to reduce the time requirements of local businesses. Moreover, coordination of research and programs encourages more efficient use of resources.
10. It is recommended that interest groups from industry and the local training board explore the possibility of forming partnerships to target those occupations which most frequently are engaged in education and training upgrading activities. The most expedient means of delivery for education and training upgrading programs is through the workplace as this is where many of the existing programs are in place.
11. It is recommended that the training board engage in a promotional campaign to highlight the work and research that they take part in. Promotion of other labour market resources should also be a part of this effort by respective community partners.