

March 2018

FOUR COUNTY LABOUR MARKET PLANNING BOARD

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# LOCAL LABOUR MARKET PLAN

COMPREHENSIVE REPORT





## Acknowledgements

Four County Labour Market Planning Board (Planning Board) would like to express our special thanks to dedicated employment services providers as well as our Planning Board directors and staff who continually contribute to the long-term sustainable workforce development in Bruce Grey, Huron and Perth counties.

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We would also like to express our appreciation to the employers and residents that participated in surveys to share their experiences and insights into the regional labour market.

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

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## Executive Summary

The Local Labour Market Plan is an annual report prepared by the Four County Labour Market Planning Board to share labour market characteristics and conditions of Stratford-Bruce Peninsula Economic Region, serving as a basis for discussions on employment issues. This report is divided into four sections: employment services, labour market conditions, industry landscape and action plan.

The employment services section captures client characteristics from service providers' data. The labour market conditions section contains data from the various sources including the Labour Force Survey. These data include unemployment numbers, unemployment rates, employment numbers, employment by sector, as well as participation rates. The industry landscape section takes a closer look at businesses of all sizes in Bruce, Grey, Huron, and Perth counties, showing business growth and concentration in the catchment area. Key observations from the latest EmployerOne survey are reported to add employer insights into the labour outlook. This report ends with an action plan outlining progress made towards building a sustainable workforce in the region.

Main highlights from the general labour market include:

- The Stratford-Bruce Peninsula Economic Region has a tight labour force with 7,100 job seekers and an unemployment rate of 4.5% in 2017.
- Employment service providers in the region continue to play a vital role in assisting unemployed people in securing employment.
- The number of active apprentices in the Stratford-Bruce Peninsula Economic Region dropped significantly in 2017.
- In 2017, sectors with top employment numbers in the region are Wholesale and retail trade, Manufacturing, Health care and social assistance, Construction, and Agriculture respectively.
- Stratford-Bruce Peninsula Economic Region has a high concentration of businesses in Agriculture.

This report also incorporates employer insights into the challenges that exist in the labour market, based on a recent EmployerOne survey and focus groups with employers. Key observations are listed below:

- The availability of qualified workers overall was perceived to be fair to poor.
- Employers are experiencing job separations, and had hard-to-fill positions.
- Employers had long-standing concerns about labour force retention within the tight labour market.
- Lacking soft skills such as work ethic, self-motivated, and teamwork ability were the most reported reasons for hard-to-fill positions.
- Employers are reluctant to provide apprenticeship opportunities due to the lack of requisite staffing ratios, loss of time/productivity, financial hardship, and loss of employees to other organizations once trained.

Based on the labour market analysis, the Planning Board has proposed initiatives to mitigate the intense challenges within the local labour force. Efforts will continually be made in planning and initiating projects that help identify employment trends, address employers' needs and concerns, as well as build a skilled workforce in Bruce, Grey, Huron and Perth counties.



## Background and Context

Since 2013, the Ministry of Advanced Education and Skills Development has provided the Planning Board with aggregate Employment Ontario (EO) program data for the purpose of labour market analysis. These data serve as the basis for evidence-based discussions about advancing employment services delivery, identifying trends in the Employment Ontario Client data, as well as addressing the challenges and opportunities in building a sustainable workforce.

This year's report will provide data for the following EO programs during the 2016-2017 fiscal year that begins on April 1st 2016 and ends on March 31st 2017:

- Employment Service (ES)
- Literacy and Basic Skills (LBS)
- Second Career (SC)
- Apprenticeship
- Canada Ontario Job Grant (COJG)-Employer (newly added in 2017)
- Canada Ontario Job Grant (COJG)-Participant (newly added in 2017)
- Ontario Employment Assistance Services (OEAS) (newly added in 2017)
- Youth Job Connection (YJC) (newly added in 2017)

This report goes beyond employment service data by incorporating sector employment and Labour Force Survey data from Statistics Canada, as well as custom tabulated Business Counts data. Additionally, this report also presents key observations from the EmployerOne survey 2017. A total of 633 employers representing 29,514 employees in the counties of Bruce, Grey, Huron and Perth shared their perspectives on labour market issues. Key topics include:

- Trends in the Employment Ontario Client data
- Labour market characteristics and conditions
- Industry landscape and business concentration
- Short- and long-term action plan update

Blank cells in this report indicate not reportable data, such as suppression or true zero or data not collected. The report will start with an analysis of Employment Ontario Client data, followed by an overview of regional labour market characteristics. Furthermore, key observations from the EmployerOne survey will be highlighted. This report will conclude with an update on the Planning Board's short- and long-term action plans.





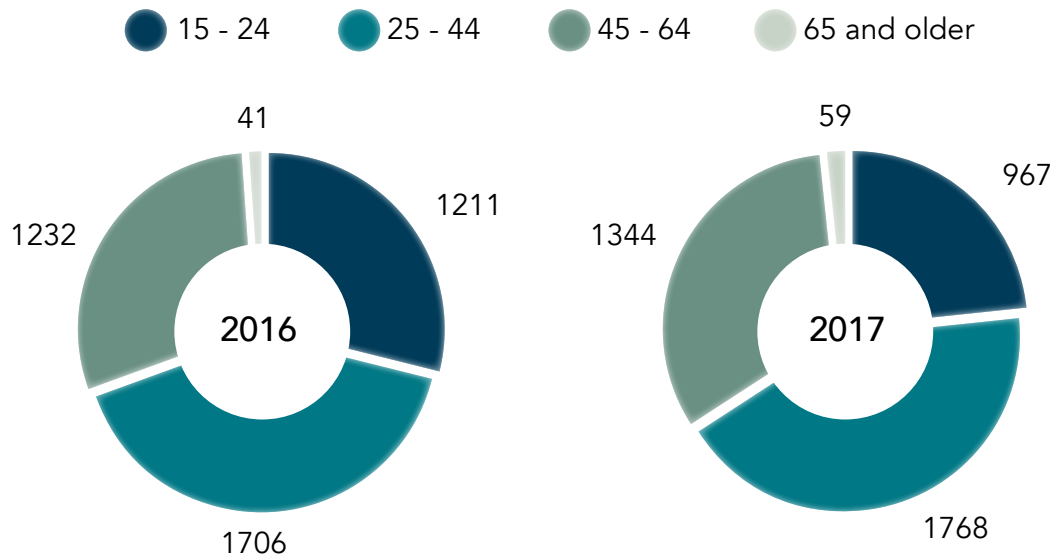
## Employment Service

The unemployment rate in the Stratford-Bruce Peninsula Economic Region fell from 5.7% in 2015 to 4.8% in 2016. Fewer people were looking for jobs in 2016 compared to 2015.

	2013	2014	2015	2016	2017
Population	246,600	246,100	245,700	246,200	246,800
Unemployment	9,200	7,600	8,700	7,300	7,100

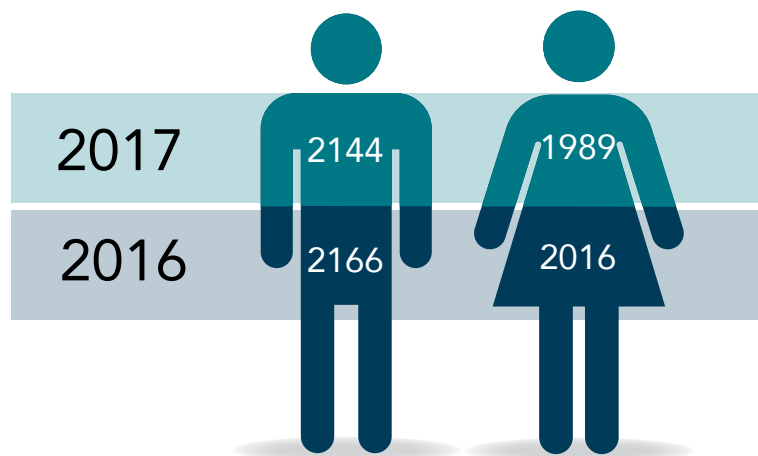
### Clients by Age Group

The total number of unemployed people served, dropped slightly in 2017 from 4190 to 4138. In 2017, job seekers aged between 25 and 44 continue to be the largest group served.



### Clients by Gender

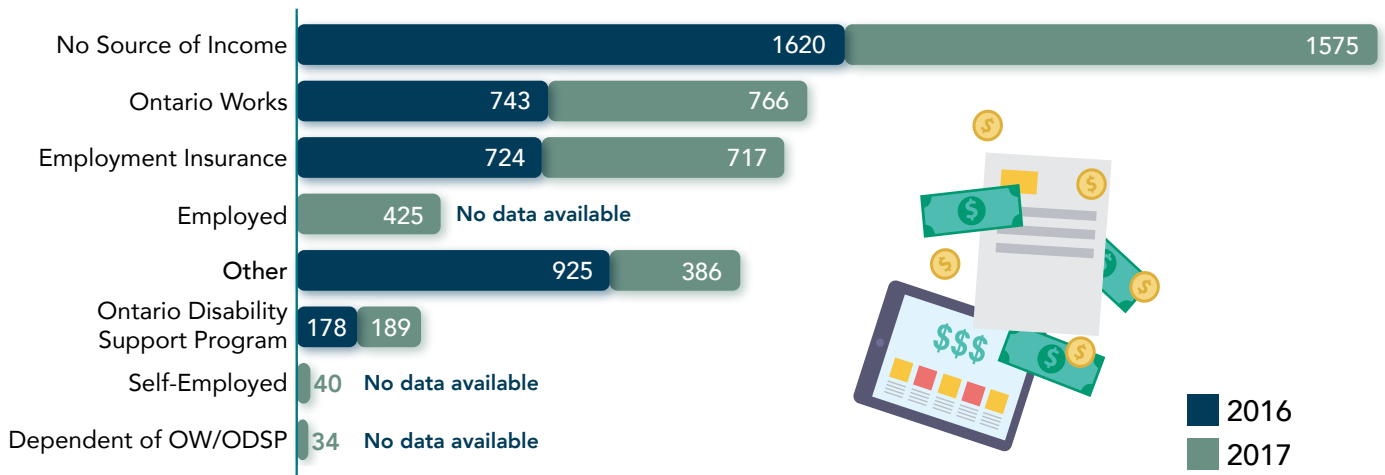
More males than females accessed employment services in 2017.





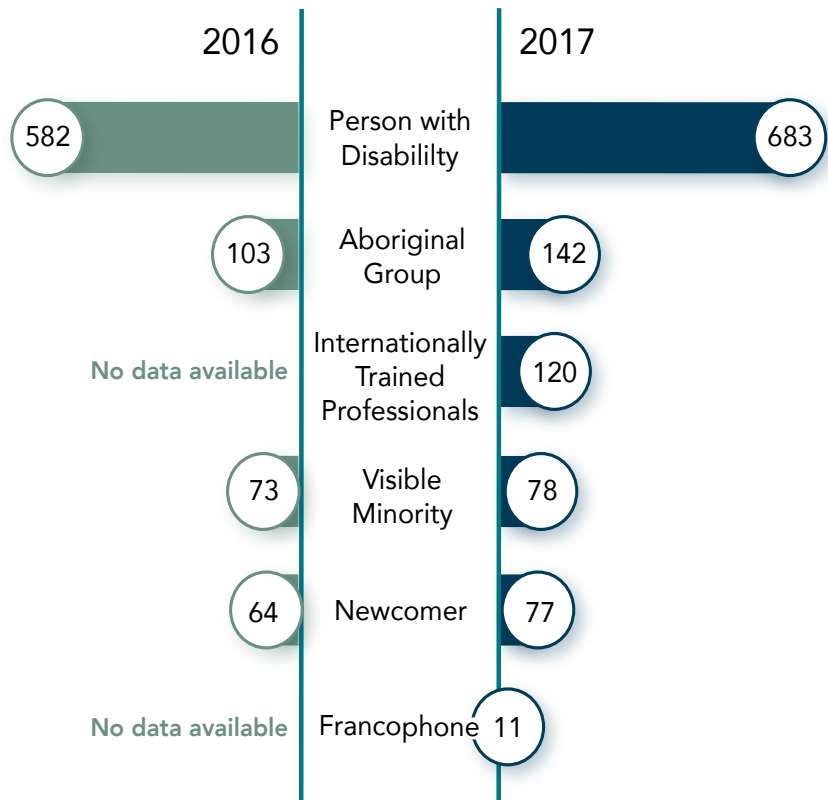
## Clients by Source of Income

A large proportion of clients in 2017 had no source of income. Clients mostly received income from Ontario Works, Employment Insurance or Employment.



## Clients by Designated Groups

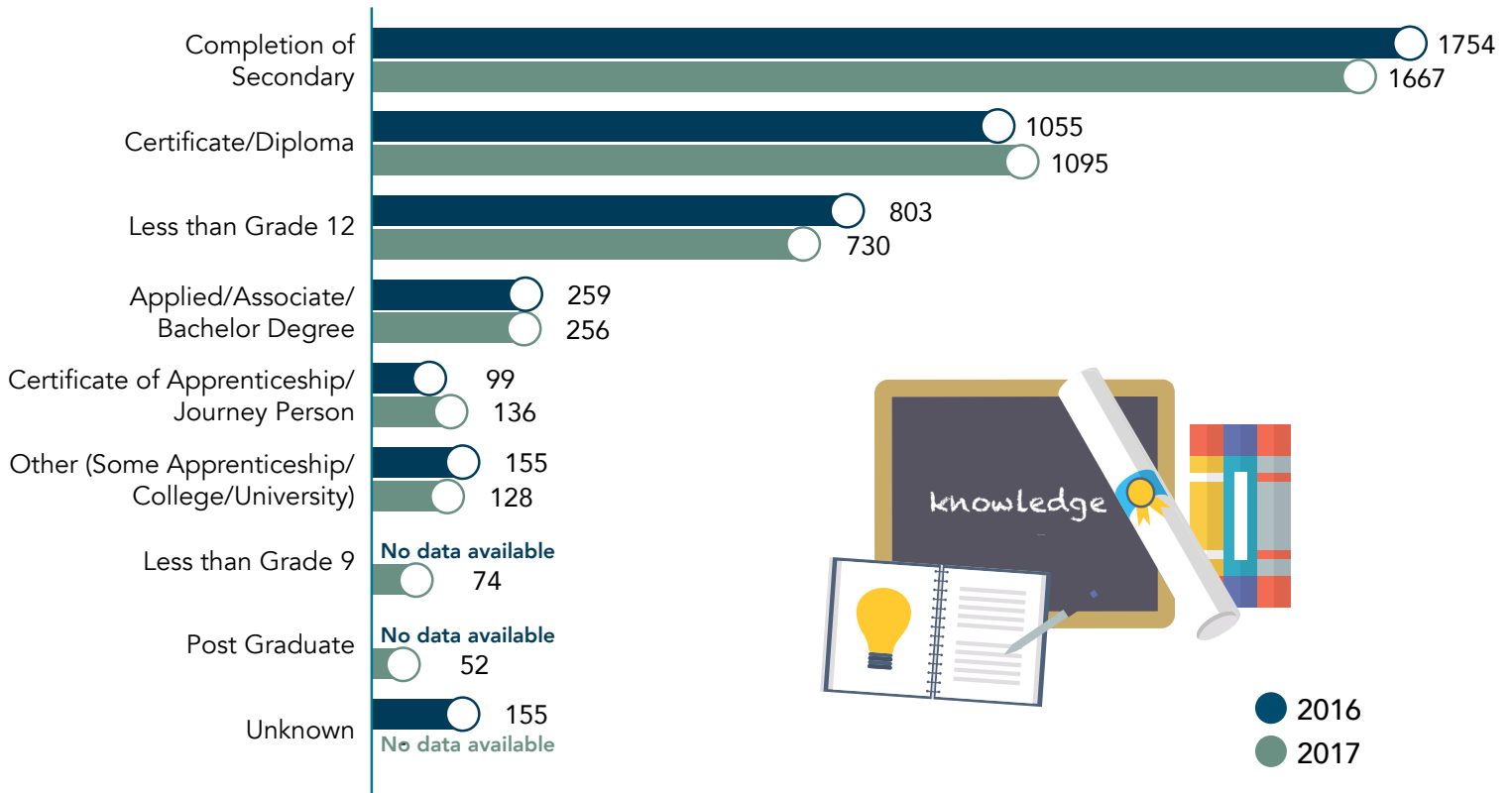
The number of clients with disabilities grew by 101 in 2017. Meanwhile, the number of aboriginal clients grew by almost 40%, from 103 to 142.





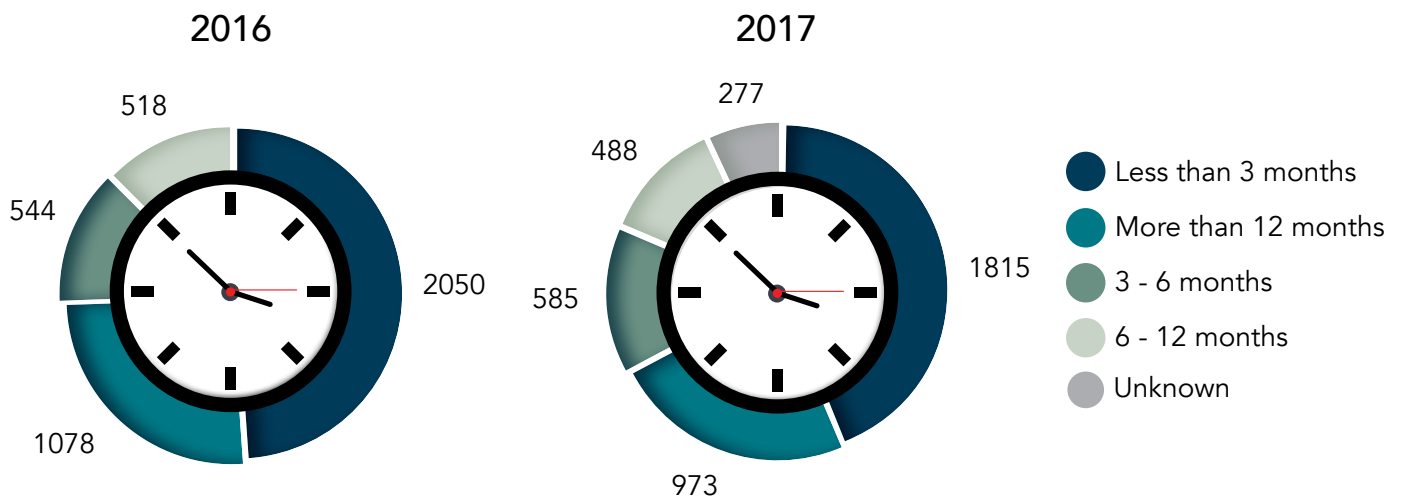
## Clients by Educational Attainment Intake

Clients who completed secondary education continue to be the largest served group in 2017 followed by those with certificate/diploma.



## Length of Time Out of Employment/Training

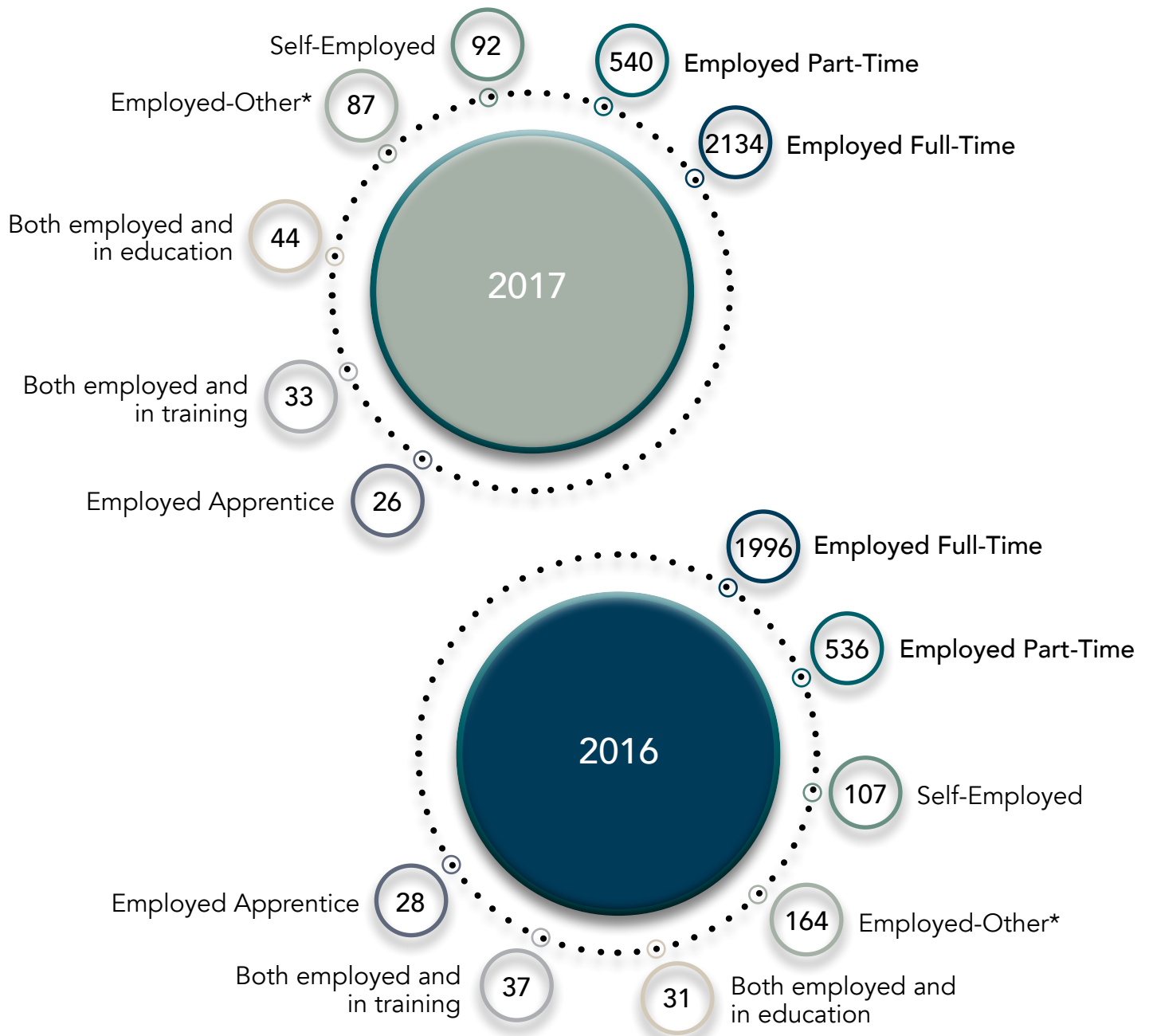
Nearly half of clients were out of employment or training for less than three months when they accessed employment services, though the number dropped slightly from last year.



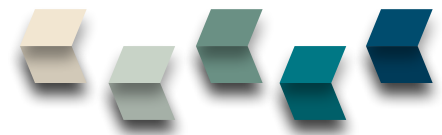


## Employment Outcomes Through Employment Services

More than half of clients were employed as a result of employment services. A small number of clients were employed as apprentices.



\*Employed in a more suitable job, employed in a prof occ/trade, employed in area of training/choice.



Through employment services, clients were able to have jobs such as Labourers, Service support, Sales support, Trade helpers, and Transport and heavy equipment operators.

#### Employed Outcome: Top 15 Employed Occupation 2016-2017

	Number
Labourers in Processing, Manufacturing and Utilities	70
Service support and other service occupations, n.e.c.	53
Sales support occupations	51
Trades helpers, construction labourers and related occupations	48
Transport and heavy equipment operation and related maintenance occupations	42
Industrial, electrical and construction trades	34
Sales representatives and salespersons - wholesale and retail trade	33
Service supervisors and technical service occupations	29
Administrative and financial supervisors and administrative occupations	27
Assemblers in Manufacturing	19
Office support occupations	17
Other installers, repairers and servicers and material handlers	17
Service representatives and other customer and personal services occupations	16
Middle management occupations in retail and wholesale trade and customer services	13
Processing and manufacturing machine operators and related production workers	13



## Canada Ontario Job Grant

Canada-Ontario Job Grant (COJG) subsidizes employers who invest in training for their employees. The COJG is available to businesses of all sizes with short-term training needs.

### Employer

A total of 174 employers in the Stratford-Bruce Peninsula Economic Region received the COJG. The majority were businesses with fewer than 50 employees (76%). Businesses with 50 to 100 employees account for 14% of all grant recipients. Most training was delivered by product vendors followed by registered private career colleges and public colleges.

#### Clients by Number of Employees

Less than 50	133
50 - 100	25
151 - 300	-
301 - 500	-
501 - 1,500	-
1,501 - 10,000	-
<i>Total Number of Employers</i>	<i>174</i>

#### Training Provider Type

Product Vendor	967
Registered Private	45
Public College	-
School Board	-
Union Based Training Centre	-
University	-

### Outcome at Exit

It was reported that the COJG assisted in increasing trainee productivity and meeting workforce needs.



Increase in trainee  
productivity  
**117**



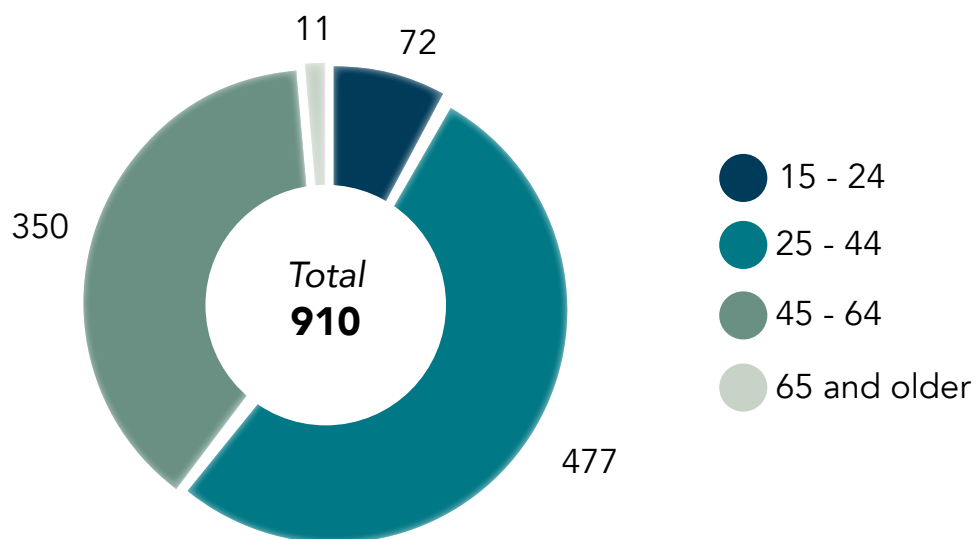
Training met  
workforce needs  
**44**



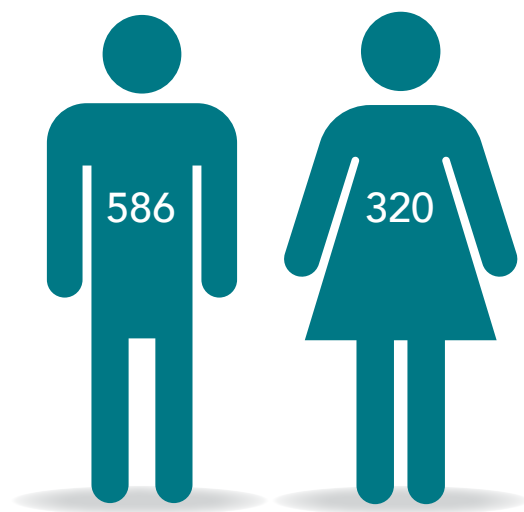
## Participant

Most trainees were aged between 25 and 44 years old, followed by 45 to 64 age cohort. The majority of trainees were full-time employees (96%), and nearly two thirds of them were male.

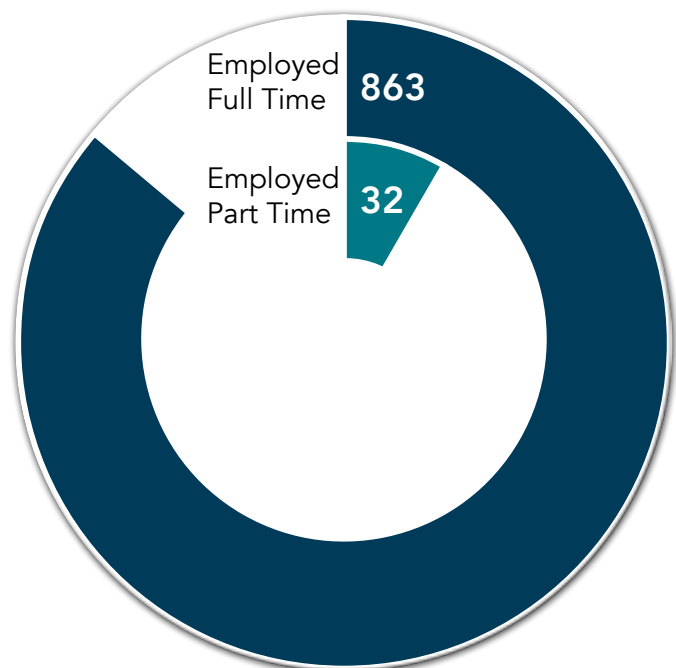
### Clients by Age Group



### Clients by Gender



### Labour Force Attachment

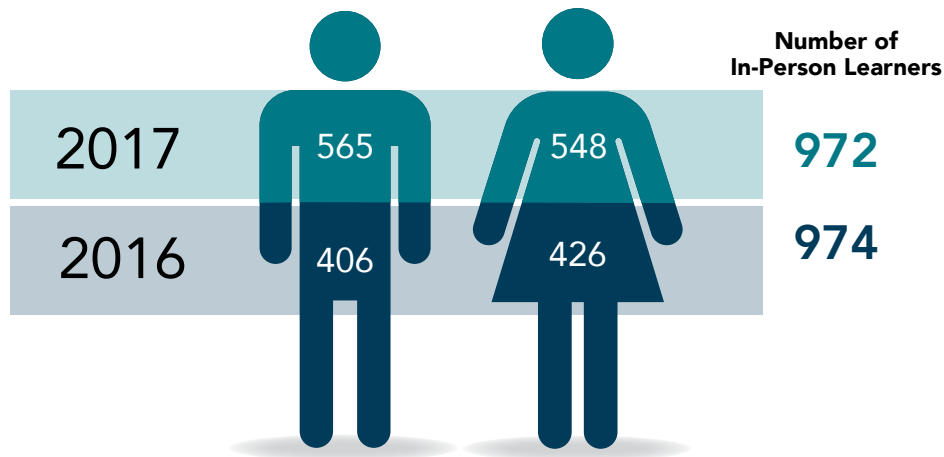




## Literacy and Basic Skills (LBS)

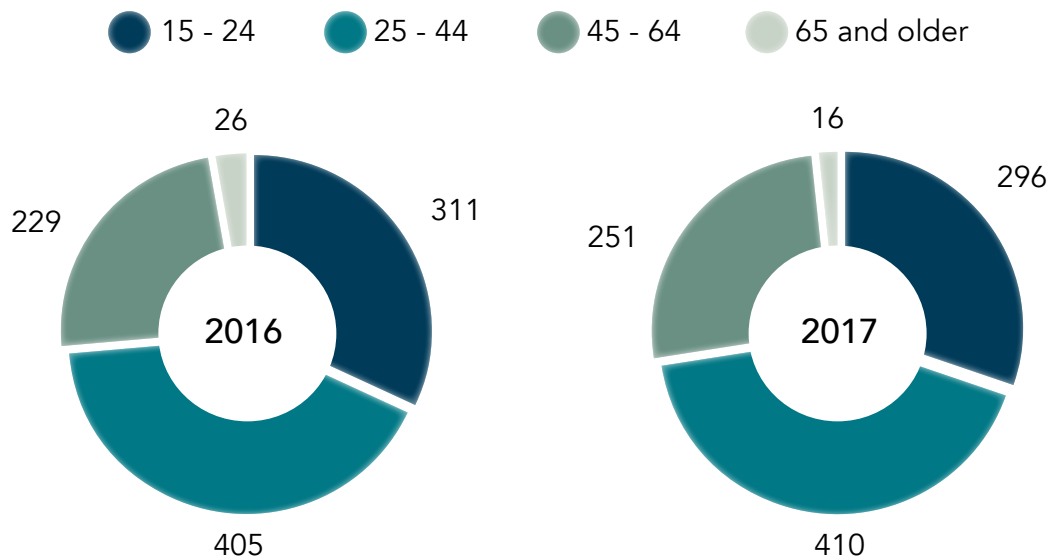
### Clients by Gender

The total number of LBS learners basically remained the same in 2017 from previous year. Females account for more than half of all learners in 2017 (56%).



### Clients by Age Group

Learners were distributed through a wide range of age groups, and those aged between 25 and 44 were the largest group served by LBS.

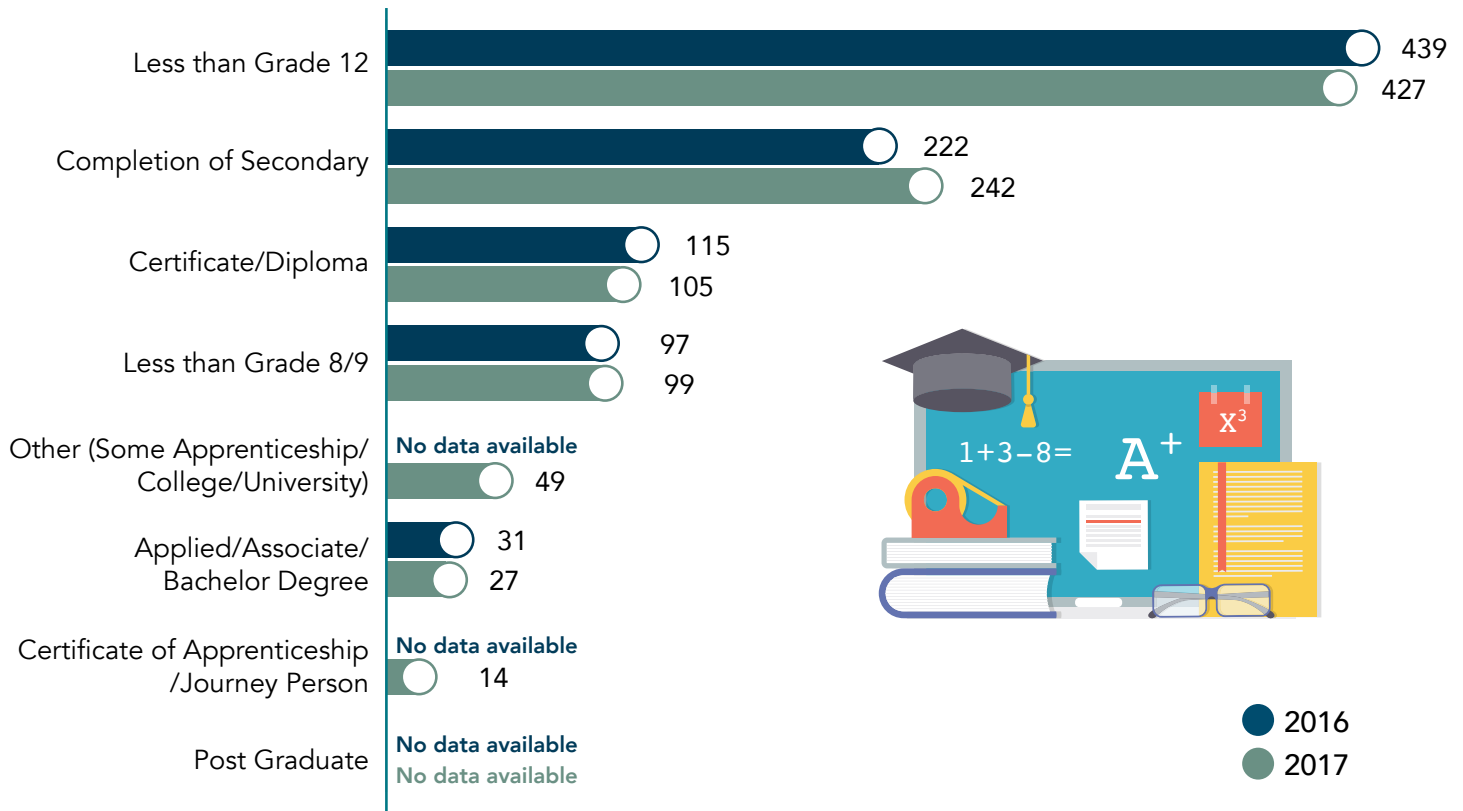






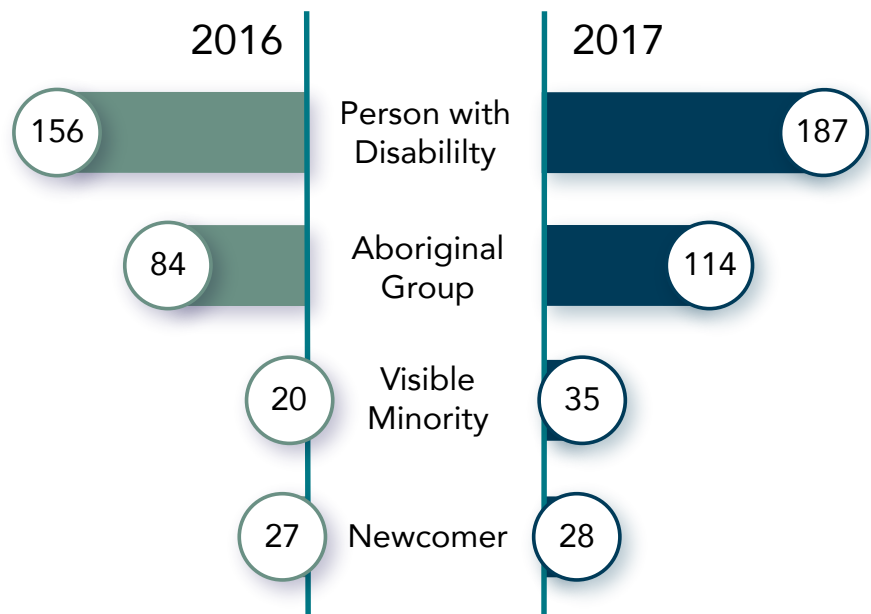
## Clients by Educational Attainment Intake

In 2017, the majority of learners reported their highest level of education to be less than Grade 12, followed by Completion of Secondary.



## Designated Groups

Similar to last year, the majority of learners in 2017 self-identified as Person with Disability, followed by Aboriginal Group. Meanwhile, Visible Minority and Newcomer Groups account for 10% and 8% respectively of all learners.





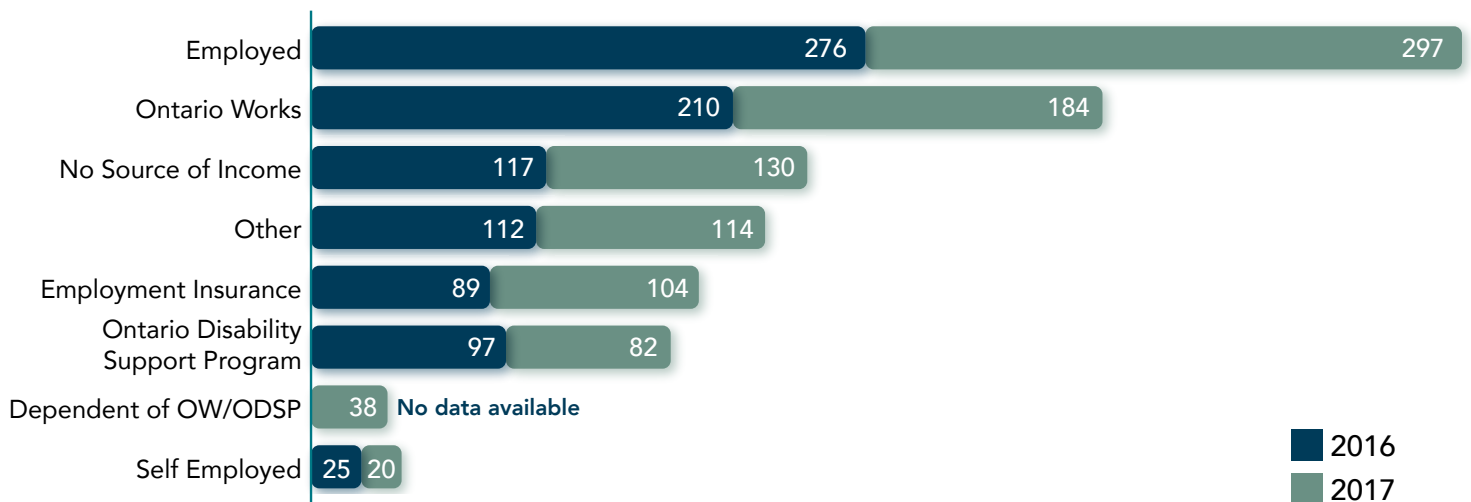
## Labour Force Attachment

The distribution of Labour Force Attachment basically remained the same in the past two years. The majority of learners were unemployed, accounting for 61% of all reported clients.



## Source of Income

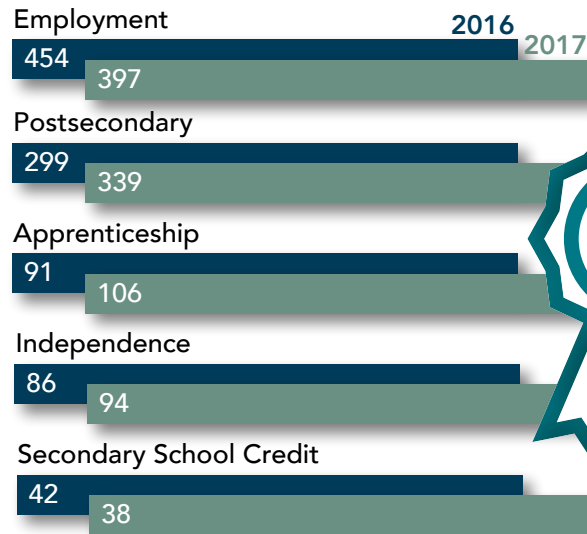
In both years, Employment was the most reported source of income, followed by Ontario Works.





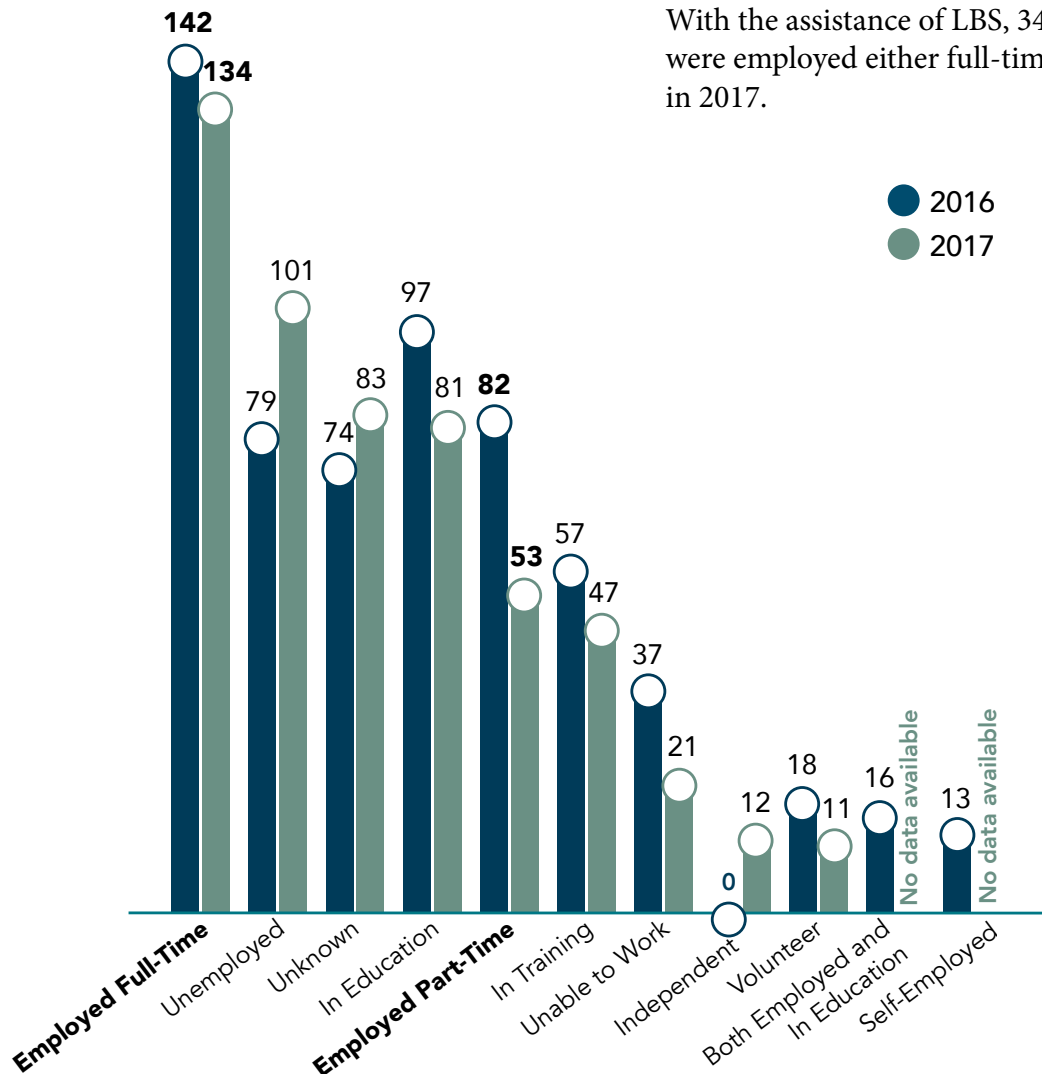
## Learner Goal Path

Most learners' goals for accessing LBS services were Employment and Postsecondary.



## Employment Outcomes Through Employment Services

With the assistance of LBS, 34% of learners were employed either full-time or part-time in 2017.





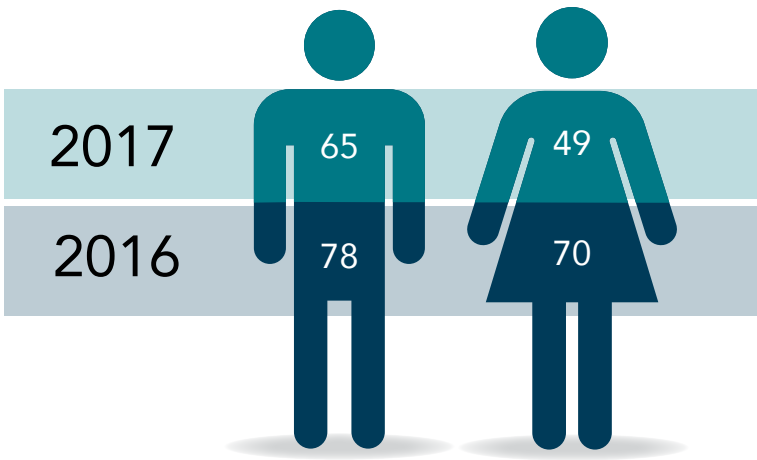
## Second Career (SC)

Second Career’s clients declined from 149 to 114 in 2017, continuing a downward trend that began in 2015. Of the 114 clients reported, 64 were between 25 and 44 years of age and 42 were between 45 and 65. More than half clients were males in both 2016 and 2017.

Number of Clients

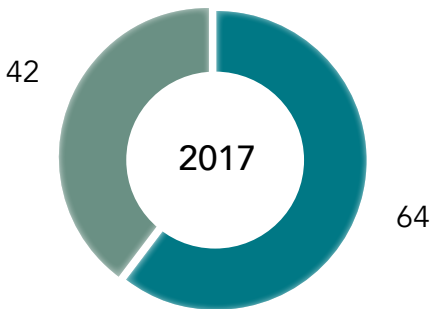
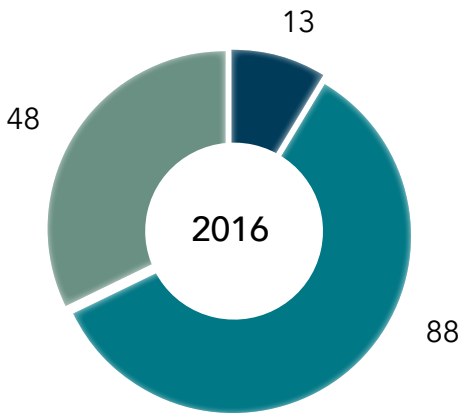


Clients by Gender



Clients by Age Group

15 - 24    25 - 44    45 - 64    65 and older

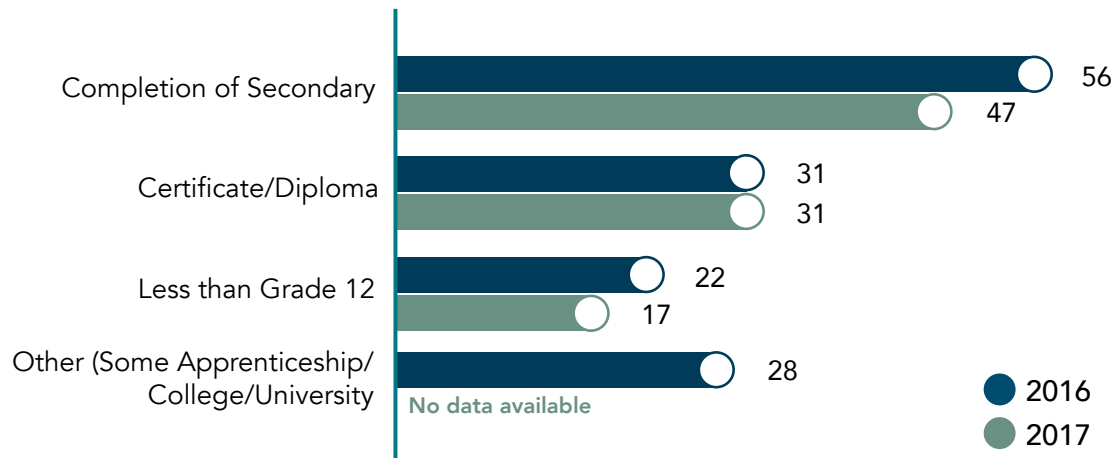


15 - 24 • No data available  
65 and older • No data available



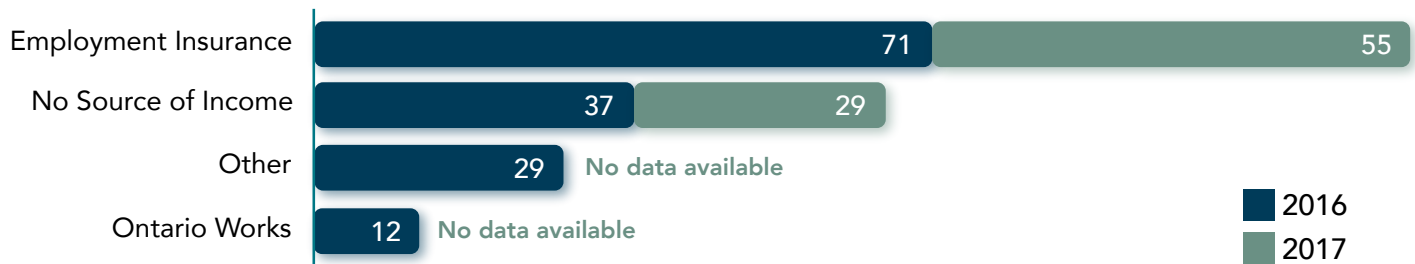
## Clients by Educational Attainment Intake

Clients at intake mostly completed Secondary education, followed by Certificate or Diploma.



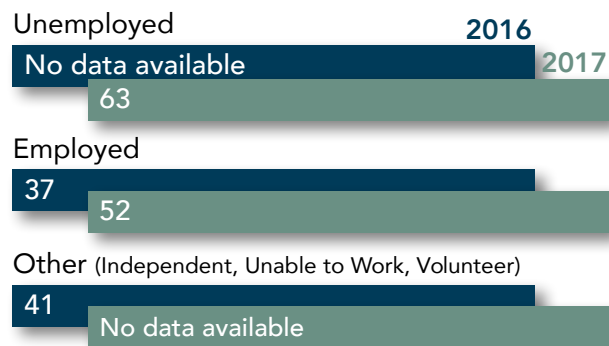
## Source of Income

A majority of clients' income was solely from Employment Insurance, and the rest had no income.



## Outcome at Exit

52 were employed at program exit; meanwhile 63 were still unemployed.

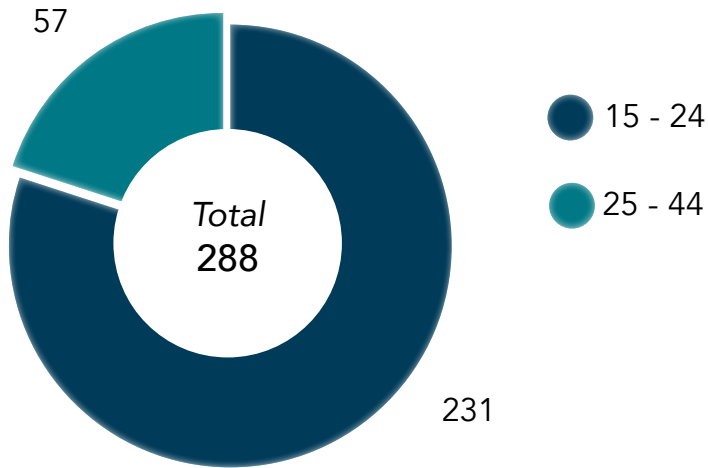




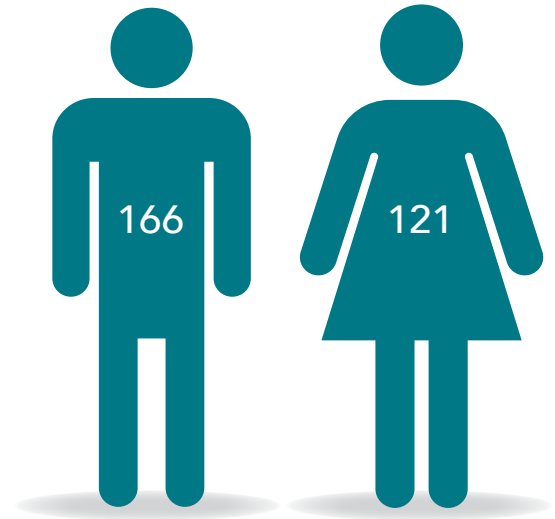
## Youth Job Connection

The Youth Job Connection (YJC) program is focused on youth between the ages of 15 and 29. Approximately 80% of clients were less than 24 years old. More than half of the clients were males (58%).

### Clients by Age Group

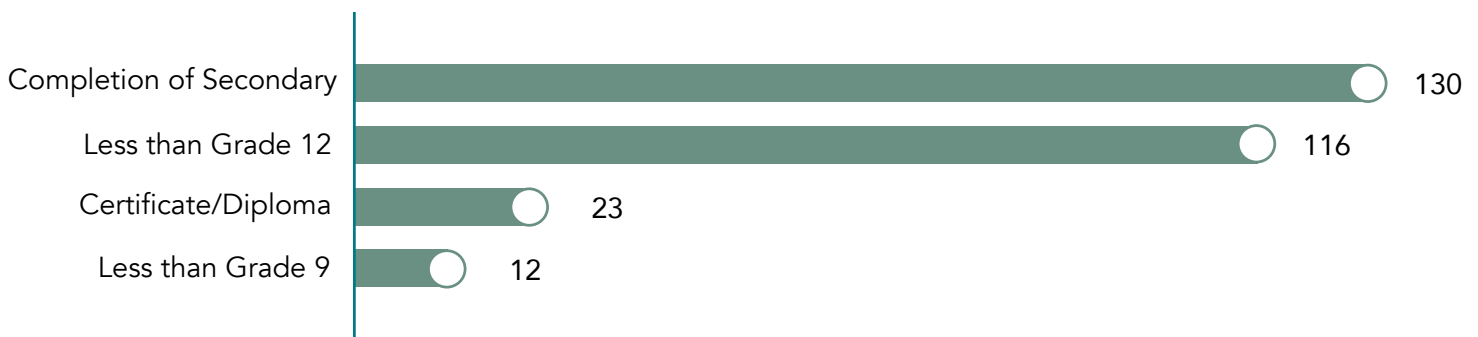


### Clients by Gender



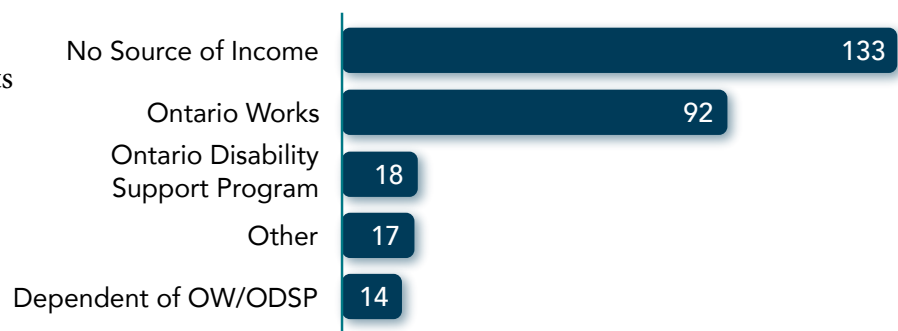
### Clients by Educational Attainment Intake

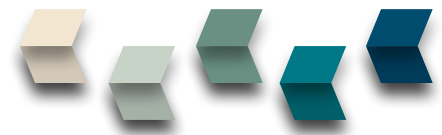
Among 281 clients who reported their educational attainment, 130 completed Secondary education while 116 had less than Grade 12 education and 12 had less than Grade 9 education.



### Source of Income

Nearly 49% of clients had no income; and the rest were recipients of Ontario Works and Ontario Disability Support Program.





## Apprenticeship

The number of active apprentices decreased significantly by 957 from 2016 to 2017. Losses were also seen in the number of new registrations, modular training registrations, as well as Certificate of Apprenticeship since 2016. The reported counts were based on the postal codes of the sponsoring employer.

Number of Clients		
	2016	2017
Number of Active Apprentices	2276	1319
Number of Certificate of Apprenticeship Issued	403	251
Number of Modular Training Registrations	329	231
Number of New Registrations	853	785

During 2016-2017 fiscal year, Electrician-Construction and Maintenance has the most new registrations, followed by General Carpenter and Cook.

Top 10 Registration 2015 - 2016	Top 10 Registration 2016 - 2017
Automotive Service Technician	Electrician-Construction and Maintenance
Electrician-Construction and Maintenance	General Carpenter
General Carpenter	Cook
Cook	Automotive Service Technician
Truck and Coach Technician	Truck and Coach Technician
Industrial Mechanic Millwright	Industrial Mechanic Millwright
Hairstylist	Plumber
Plumber	Hairstylist
Process Operator-Power	Welder
Child Development Practitioner	Process Operator-Power



## EO Data Consultation Observations

The Planning Board hosted a webinar in December 2017 and shared five-year data of EO programs with employment service providers. Ten webinar participants first heard a presentation regarding characteristics of the labour market as well as trends of client numbers, age groups, gender and service outcomes, and then shared insights into service gaps and potential solutions.

### Observation one: Clients are facing non-employment problems

As stated by webinar participants, some clients need other services prior to the employment services. Some clients were experiencing anxiety, addiction issues or learning disabilities, and they needed non-employment services such as mental health counseling. Some webinar participants made referrals for those clients as they deem necessary. It was suggested that those clients with multi-barriers first receive coaching services in community placement for up to six months, and then “transfer” to employment service providers.

### Observation two: Child care and transportation issues

Employment service clients, especially those enrolled in Literacy and Basic Skills programs, need extra support on child care and transportation. Some of these clients were spouses of people who already had jobs and they were exploring employment options in the community.

### Observation three: Mental health service gap

Some webinar participants found that the region did not have enough mental health service providers. After referral, clients waited in line for a long time for an initial consultation. Clients remain unemployable since they were unable to see the doctor or physician in a timely manner. Clients were able to access short-term counselling services through an educational institution, but they may need long-term treatment from counselors. Since employment service providers are not equipped with qualifications to address mental health issues; it is recommended that subcontractors or someone with required qualifications could be hired on site to provide such services.





## Labour Market Conditions

The population in Stratford-Bruce Peninsula Economic Region (Region) was 246,800 in 2017, slightly increased compared with 2016. The population has hovered around this level since 2013.

Employment in the Region was 149,000 in 2017, little changed compared with 2016 (+2.4%). The employment gains in 2017 were driven by full-time work (+5,500), while fewer people worked part-time (-1,000). There were 7,100 people searching for jobs in the labour market in 2017.

### Labour Force Characteristics in Stratford-Bruce Peninsula 2013 - 2017

Labour force characteristics	2013	2014	2015	2016	2017
Population (x 1,000)	246.6	246.1	245.7	246.2	246.8
Employment (x 1,000)	150.6	151.1	145	145.5	149.0
Full-time employment (x 1,000)	117.6	117.4	114.3	113.4	118.9
Part-time employment (x 1,000)	32.9	33.7	30.7	32.1	30.1
Unemployment	9,200	7,600	8,700	7,300	7,100

Source: CANSIM 282-0123

The unemployment rate in the Region was 4.5% in 2017, dropped by 0.3 percentage compared with 2016. The Region's unemployment rate continues to be lower than Ontario over the past five years. The participation rate in the Region trended downwards between 2013 and 2016, and slightly increased in 2017. Overall, the participation rate in the Region has remained lower than the provincial level.

### Unemployment Rate and Participation Rate in the Region and Ontario 2013 - 17

Labour force characteristics		2013	2014	2015	2016	2017
Unemployment rate	Region	5.8%	4.8%	5.7%	4.8%	4.5%
	Ontario	7.6%	7.3%	6.8%	6.5%	6.0%
Participation rate	Region	64.8%	64.5%	62.6%	62.1%	63.2%
	Ontario	66.3%	65.8%	65.2%	65.0%	64.9%

Source: CANSIM 282-0123



## Participation Over 10 Years

Regional participation rates across age cohorts are above or comparable to provincial rates. While the participation rate of 15 years and over had declined by 3.1% between 2007 and 2016, this decline was not observed within any of the disaggregated age cohorts. The participation rate for the largest cohorts (25 to 44 years and 45 to 54 years) saw only slight declines, and for 55 to 64 years and 66 plus the participation rate actually increased.

Participation Rate by Age Cohort in the Region in 2007 and 2016

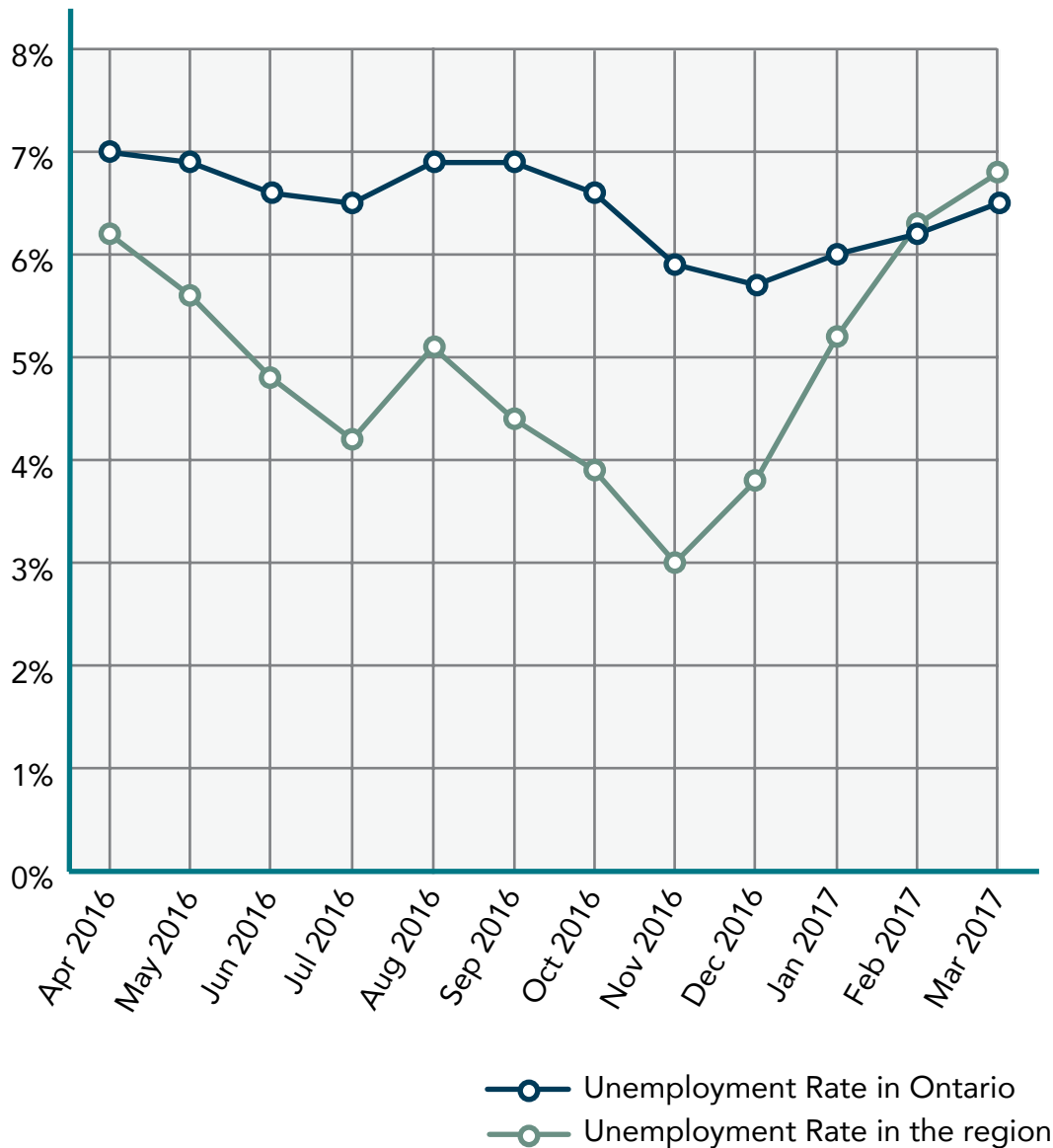
	2007 Participation Rate	2016 Participation Rate	Percentage Point Difference
15 years and over	65.2%	62.1%	-3.1%
15 to 24 years	73.9%	71.9%	-2.0%
25 to 44 years	88.9%	88.7%	-0.2%
45 to 54 years	85.1%	84.4%	-0.7%
55 to 64 years	62.0%	64.2%	2.2%
65 years and over	9.6%	15.4%	5.8%

Source: Statistics Canada, Labour Force Survey



Since the second quarter of 2016, the Region's unemployment rate has been lower than the provincial rate. The unemployment rate rose to 6.8% in March 2017, the highest rate during the 2016-2017 fiscal year. The upward trend in the unemployment rate began in November 2016.

### Month-to-month Unemployment Rate in 2016-2017 Fiscal Year



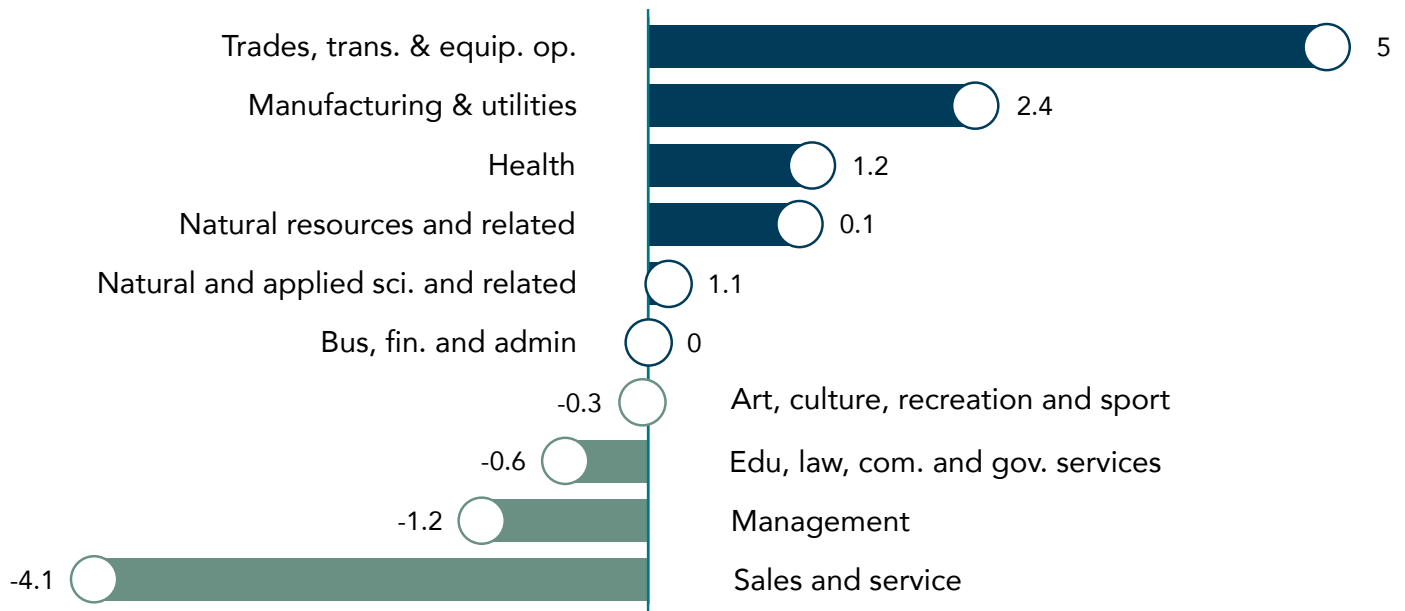
Notable employment changes by occupation can be seen between 2016 and 2017. Five of the ten occupational groups in the Region had employment growth over 2017 compared to a year earlier. These occupations gained the most jobs: Trades, transport and equipment operators and related occupations (+5,000), Occupations in manufacturing and utilities (+2,400), Health occupations (+1,200), and Natural resources, agriculture and related production occupations (+1,100).



Notable employment changes by occupation can be seen between 2016 and 2017. Five of the ten occupational groups in the Region had employment growth over 2017 compared to a year earlier. These occupations gained the most jobs: Trades, transport and equipment operators and related occupations (+5,000), Occupations in manufacturing and utilities (+2,400), Health occupations (+1,200), and Natural resources, agriculture and related production occupations (+1,100).

These occupations lost jobs: Sales and service occupations (-4,100), Management occupations (-1,200), Occupations in education, law and social, community and government services (-600), and Occupations in art, culture, recreation and sport (-300).

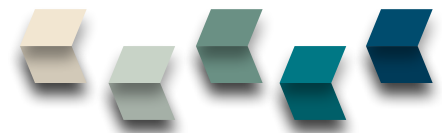
### Employment Increase and Decrease by Occupation Persons x1000 2016 - 2017



Compared to 2016, employment in Professional, scientific and technical services rose by 2,600 in 2017, followed by Construction (+2,200), Agriculture (+1,900), and Manufacturing (+1,300). Losses were seen in Accommodation and food services (-3,700), Wholesale and retail trade (-1,400), and Public administration (-800).

Sectors with the highest employment growth were Professional, scientific and technical services (+60.5%), Agriculture (+19%), Construction (+16.1%), Information, culture and recreation (+14.9%), as well as Utilities (+14.3%).

Several sectors had employment declines in 2017, with the largest in Accommodation and food services (-28.2%), Public administration (-19%), and Transportation and warehousing (-9.3%).



### Employment in Stratford-Bruce Peninsula based on North American Industry Classification System (NAICS) Persons x 1,000

NAICS	2016	2017	Absolute Change	Percentage Change
Professional, scientific and technical services	4.3	6.9	2.6	60.5%
Agriculture	10	11.9	1.9	19.0%
Construction	13.7	15.9	2.2	16.1%
Information, culture and recreation	4.7	5.4	0.7	14.9%
Utilities	4.2	4.8	0.6	14.3%
Business, building and other support services	4.6	5	0.4	8.7%
Manufacturing	19.2	20.5	1.3	6.8%
Forestry, fishing, mining, quarrying, oil and gas	1.6	1.7	0.1	6.2%
Health care and social assistance	15.6	16.5	0.9	5.8%
Finance, insurance, real estate, rental and leasing	7.3	7.2	-0.1	-1.4%
Other services (except public administration)	6.2	5.9	-0.3	-4.8%
Educational services	7.8	7.4	-0.4	-5.1%
Wholesale and retail trade	23.6	22.2	-1.4	-5.9%
Transportation and warehousing	5.4	4.9	-0.5	-9.3%
Public administration	4.2	3.4	-0.8	-19.0%
Accommodation and food services	13.1	9.4	-3.7	-28.2%

Source: Statistics Canada Table 282-0125



Census data on population and education help us to understand the supply side of the regional labour market. This section refers to Canadian Census data in 2011 and 2016 and investigates the population changes and educational characteristics of the labour force.

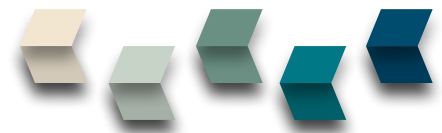
The median age increased from 45.4 to 46.7 years old between 2011 and 2016. Over the same period, persons of working age declined by 4.6 percentage points to 61.4%.

	2011 Population	2011 Population Percentage	2016 Population	2016 Population Percentage
0 to 14 years	47,730	16.7%	48,440	16.3%
15 to 64 years	188,255	66.0%	183,150	61.4%
65 years and over	49,355	17.3%	66,480	22.3%
Median age	45.4		46.7	

Source: Canadian NHS 2011 and Census 2016

In 2016, more than half of adults aged 25 to 64 (56.2%) had a postsecondary qualification in the trades, college or university; meanwhile, the rate in Ontario was 65.2%. An additional 28.9% had a high school diploma as their highest level of educational attainment; 15% had no certificate, diploma or degree.

The Region had a lower percentage of university graduates than Ontario. Among the three postsecondary credentials, trades certificates and college level certificates or diplomas were held by a higher proportion of people in the region than Ontario. At the trades level, three-quarters of Registered Apprenticeship certificates were held by men.



### Highest Completed Education in the Region for the population aged 25 to 64 years in private households - Census 2016

	Region	Percentage	Ontario	Percentage
No certificate; diploma or degree	22,225	15.0%	752,995	10.4%
Secondary (high) school diploma or equivalency certificate	42,890	28.9%	1,768,955	24.5%
Apprenticeship or trades certificate or diploma	14,380	9.7%	446,390	6.2%
College; CEGEP or other non-university certificate or diploma	43,140	29.1%	1,782,530	24.7%
University certificate or diploma below bachelor level	2,515	1.7%	170,925	2.4%
University certificate; diploma or degree at bachelor level or above	23,305	15.7%	2,307,320	31.9%

Source: Canadian NHS 2011 and Census 2016

According to Statistics Canada Census 2016, 14,380 adults aged 25 to 64 in Stratford-Bruce Peninsula economic region had an apprenticeship or trades certificate or diploma, and among them 8,890 obtained a Certificate of Apprenticeship or a Certificate of Qualification.

While women continue to make up the majority of population with university level credentials or above, they are still in the minority in the skilled trades.

### Holders of Apprenticeship or trades certificate or diploma by Gender

	Total	Male	Female
Trades certificate or diploma other than Certificate of Apprenticeship or Certificate of Qualification	5,490	3,540	1,950
Certificate of Apprenticeship or Certificate of Qualification	8,890	7,385	1,505
In total	14,380	10,925	3,455

Source: Canadian Census 2016



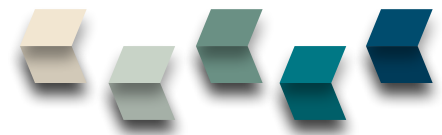
Women comprised the majority of university degree holders. Nearly 61% of adults aged 25 to 64 in the region held a Bachelor's degree. The proportion of women among Bachelor's degree, University certificate, Master's degree was particularly high.

#### Holders of University Certificate, Diploma or Degree at Bachelor Level or above in Stratford-Bruce Peninsula Economic Region by Gender

	Percentage	Male	Female
Bachelor's degree	71.3%	39.1%	60.9%
University certificate or diploma above bachelor level	8.0%	31.3%	68.4%
Degree in medicine; dentistry; veterinary medicine or optometry	3.1%	50.3%	49.0%
Master's degree	16.0%	39.4%	60.6%
Earned doctorate	1.5%	52.2%	47.8%
In total	100%	39.1%	60.9%

Source: Canadian Census 2016





## Industry Landscape

In order to present the information on business growth between June 2016 and June 2017, this report divides businesses by employment size and explores changes in each size range, showing movement from one category to another or entry or exit of businesses. This section also assesses the relative concentration of businesses in the region using Ontario as a benchmark.

Statistics Canada categorizes businesses by their employee size. For the sake of reporting, this section refers to Statistics Canada's definition:

- Micro: 1-4 employees;
- Small: 5-99 employees;
- Medium: 100-499 employees;
- Large: 500+ employees.

Overall, micro and small businesses accounted for over 95% of all businesses in the Region. According to the Business Counts data released in June 2017, businesses with 1 to 4 employees in Bruce County made up 54% of total businesses; while the rate was 52% in both Grey and Huron counties, and 50% in Perth County.

Distribution of Business by Employee Size June 2017

Size	Bruce		Grey		Huron		Perth	
	Counts	Percentage	Counts	Percentage	Counts	Percentage	Counts	Percentage
Micro 1-4	1,089	54%	1,567	52%	1,068	52%	1,422	52%
Small 5-99	893	45%	1,360	45%	958	47%	1,378	48%
Medium 100-499	22	1%	63	2%	26	1%	62	2%
Large 500+	2	<1%	3	<1%	2	<1%	7	<1%

Source: Canadian Business Counts June 2017

The four counties in the Region all had a higher concentration of businesses in Agriculture, forestry, fishing and hunting compared to Ontario. This implies that businesses within the Agriculture sector may have a competitive advantage over those outside of the region since they are able to operate more productively by being closer to their suppliers.



## Bruce County

The number of total classified businesses in Bruce County basically remained the same in 2017 compared to the previous year, with a net gain of three businesses with employees. The County gained seven small businesses from 12 months earlier. Over the same period, the area lost two micro and two medium businesses.

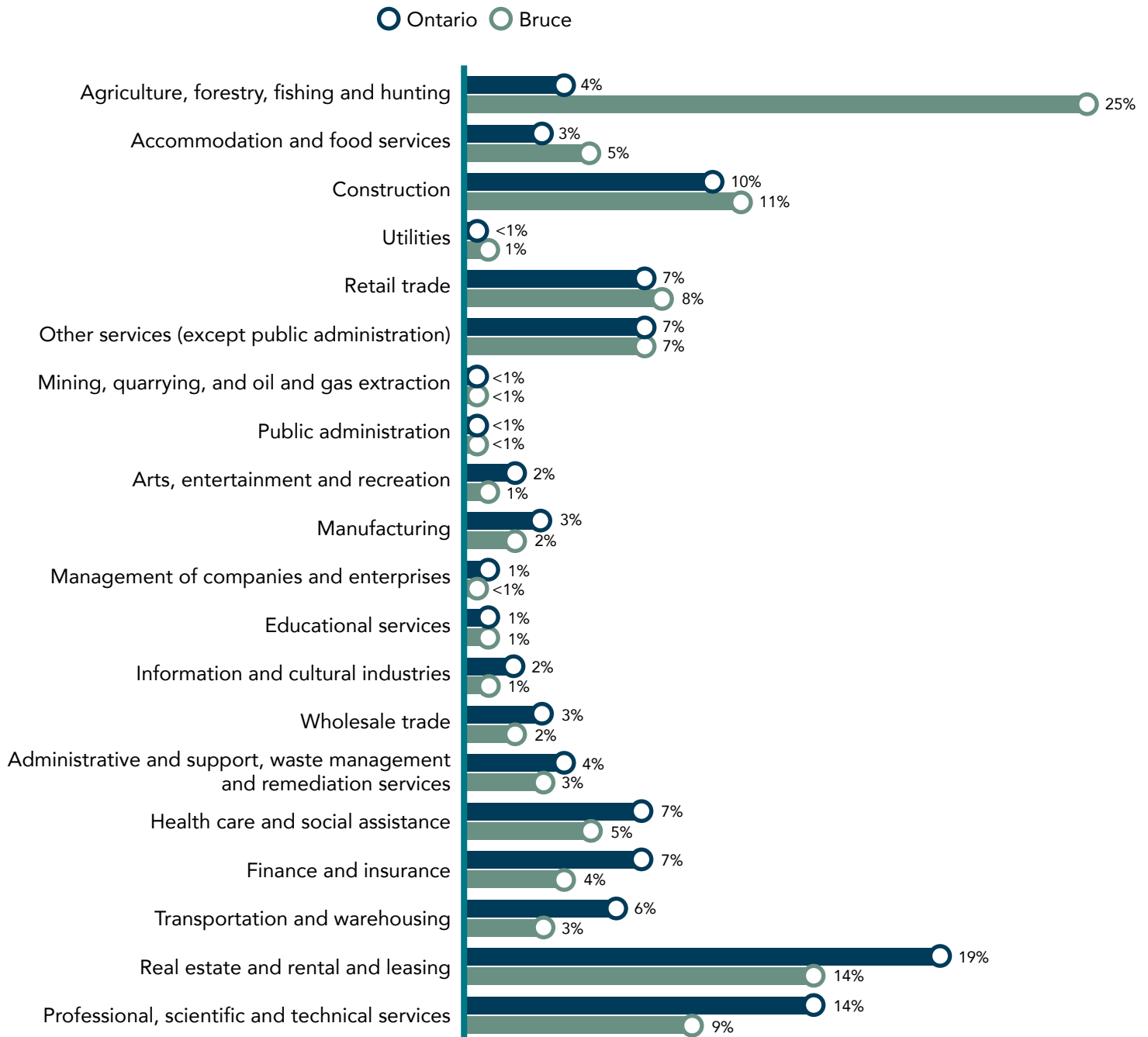
Employee Size Range	2016	2017	Absolute Change	Percentage Change
0	5,211	5,293	82	2%
1-4	1,091	1,089	-2	0%
5-9	417	438	21	5%
10-19	276	271	-5	-2%
20-49	148	148	0	0%
50-99	45	36	-9	-20%
100-199	15	14	-1	-7%
200-499	9	8	-1	-11%
500+	2	2	0	0%
<b>Total</b>	<b>7,214</b>	<b>7,299</b>	<b>85</b>	<b>1%</b>

Overall, Bruce County had a significantly higher concentration of businesses in Agriculture, forestry, fishing and hunting than Ontario. The concentration was slightly higher than the provincial rate in sectors such as Accommodation and food services, Construction, Utilities, Retail trade, Other services (except public administration), Mining, quarrying, and oil and gas extraction, and Public administration.

Businesses in Agriculture, forestry, fishing and hunting accounted for 25% of total businesses, whereas the rate was 4% in Ontario. Among the 1,793 Agriculture businesses, the majority undertook activities on animal production and aquaculture (1,002) and crop production (700). The County had 818 businesses in Construction. Two-thirds were specialty trade contractors, and the rest were building constructors.



## Business Concentration by 2-Digit NAICS - June 2017





## Local Lens on BRUCE COUNTY

EmployerOne Survey

121 businesses in Bruce County identified their workforce needs in this year's EmployerOne survey. This represents 17% of all survey responses from the Four County area, and 6% of all businesses in Bruce County.

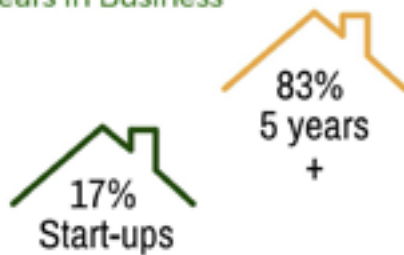
### Survey Key Findings



69% of employers hired in 2016 : 38% had hard-to-fill positions : 66% plan to hire in 2017

### Economic Profile

#### Years in Business

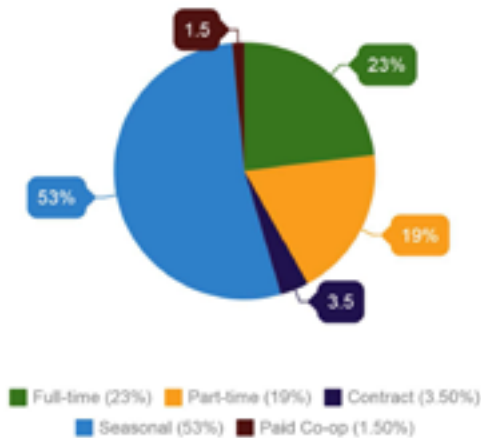


### Bruce County Workforce



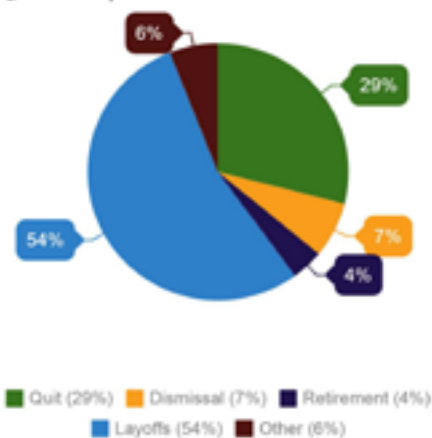
### Hiring Trends

81 employers filled  
455 positions



### Retention Trends

67 employers experienced  
414 separations





## Skill Shortage

Employers rate the availability of skilled workers as



## Hard-to-Fill Jobs

**25%** of employers have spent over a year trying to fill hard-to-fill jobs



### Top 3 reasons positions were hard to fill:

- Not enough applicants
- Lack of motivation, attitude, or interpersonal abilities
- Lack of qualifications (education level/credentials)

### Top 3 Competencies needed in hard-to-fill positions:

- Work ethic, dedication, dependability
- Self-motivated/ability to work with little or no supervision
- Customer service

## Recruitment

### Top Recruitment Methods



### Positions Filled in 2016

Labourers  
Sales  
Cook/chef

**Top 3**

## Training

**68%** of employers supported ongoing training

**32%** of employers could not support ongoing training

### Top 3 Barriers to supporting training



- Relevant training not offered locally
- Cost
- Loss of productivity during training time

For more information about EmployerOne or to sign up for next year's survey (January 2018), contact the Four County Labour Market Planning Board



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## Grey County

Grey County had a net gain of 40 businesses with employees, among which were one medium-, 24 small-, and 15 micro-sized businesses.

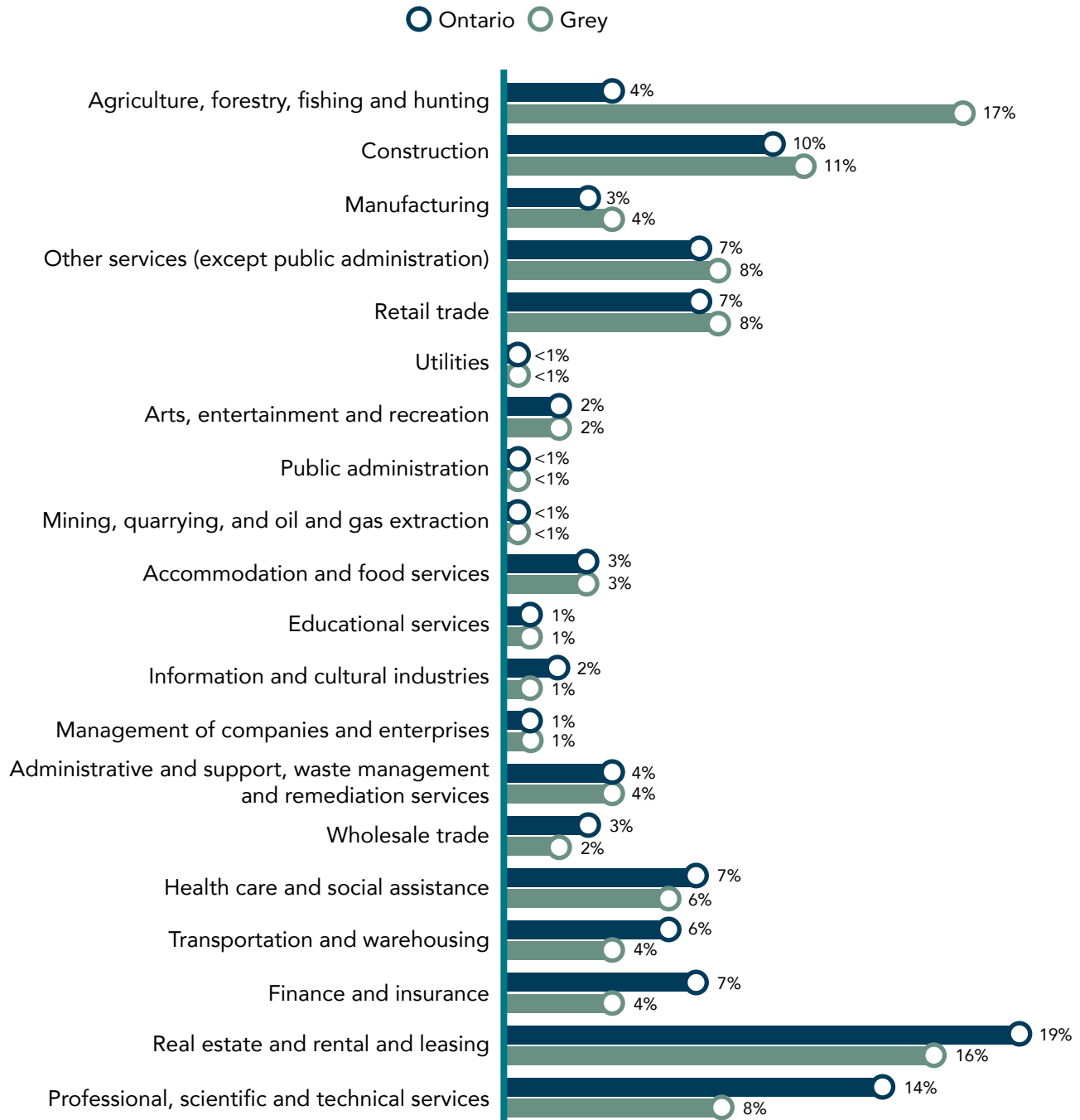
Employee Size Range	2016	2017	Absolute Change	Percentage Change
0	6,828	7,026	198	3%
1-4	1,552	1,567	15	1%
5-9	643	672	29	5%
10-19	408	421	13	3%
20-49	220	216	-4	-2%
50-99	65	51	-14	-22%
100-199	41	42	1	2%
200-499	21	21	0	0%
500+	3	3	0	0%
Total	9,781	10,019	238	2%

Compared with Ontario, Grey County's businesses concentrated in Agriculture, forestry, fishing and hunting, Construction, Manufacturing, Other services (except public administration), Retail trade, and Utilities.

Specifically, most businesses in Agriculture, forestry, fishing and hunting performed activities such as animal production and aquaculture (991) and crop production (554). Nearly two-thirds of Construction businesses were specialty trade contractors, and the rest were working on building and heavy engineering construction. Most Manufacturing businesses were in Fabricated metal product manufacturing, Wood product manufacturing, Machinery manufacturing, as well as Furniture and related product manufacturing.



## Business Concentration by 2-Digit NAICS - June 2017





## Local Lens on GREY COUNTY

EmployerOne Survey

277 businesses in Grey County identified their workforce needs in this year's EmployerOne survey. This represents 38% of all survey responses from the Four County area, and 9% of all businesses in Grey County.

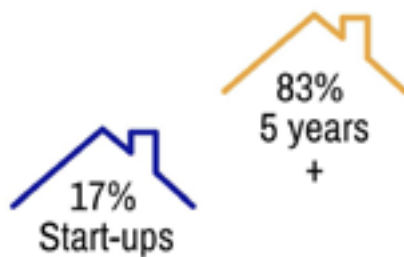
### Survey Key Findings



66% of employers hired in 2016 : 41% had hard-to-fill positions : 55% plan to hire in 2017

### Economic Profile

#### Years in Business

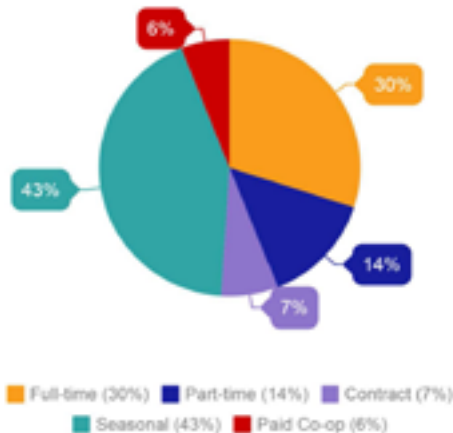


### Grey County Workforce



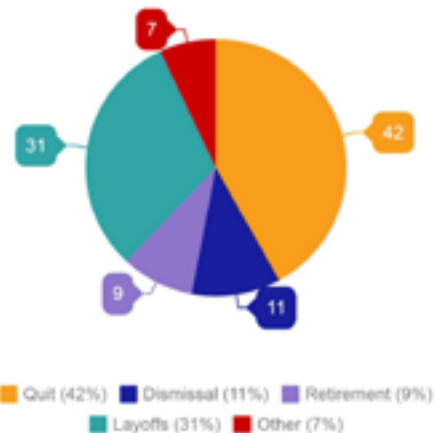
### Hiring Trends

178 employers filled  
1566 positions



### Retention Trends

152 employers experienced  
943 separations







## Skill Shortage

Employers rate the availability of skilled workers as



## Hard-to-Fill Jobs

**23%** of employers have spent over a year trying to fill hard-to-fill jobs

### Top 3 reasons positions were hard to fill:

- Not enough applicants
- Lack of qualifications (education level/credentials)
- Lack of motivation, attitude, or interpersonal abilities



### Top 3 Competencies needed in hard-to-fill positions:

- Work ethic, dedication, dependability
- Self-motivated/ability to work with little or no supervision
- Teamwork/interpersonal ability

## Recruitment

### Top Recruitment Methods



### Positions Filled in 2016

Sales  
Administrative Assistant  
Customer Service



## Training

**73%** of employers supported ongoing training

**27%** of employers could not support ongoing training

### Top 3 Barriers to supporting training

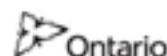


- Cost
- Relevant training not offered locally
- Loss of productivity during training time

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## Huron County

Huron County gained one new large and one medium business; meanwhile the County lost 18 small and 26 micro ones. The County had a net loss of 42 businesses with employees.

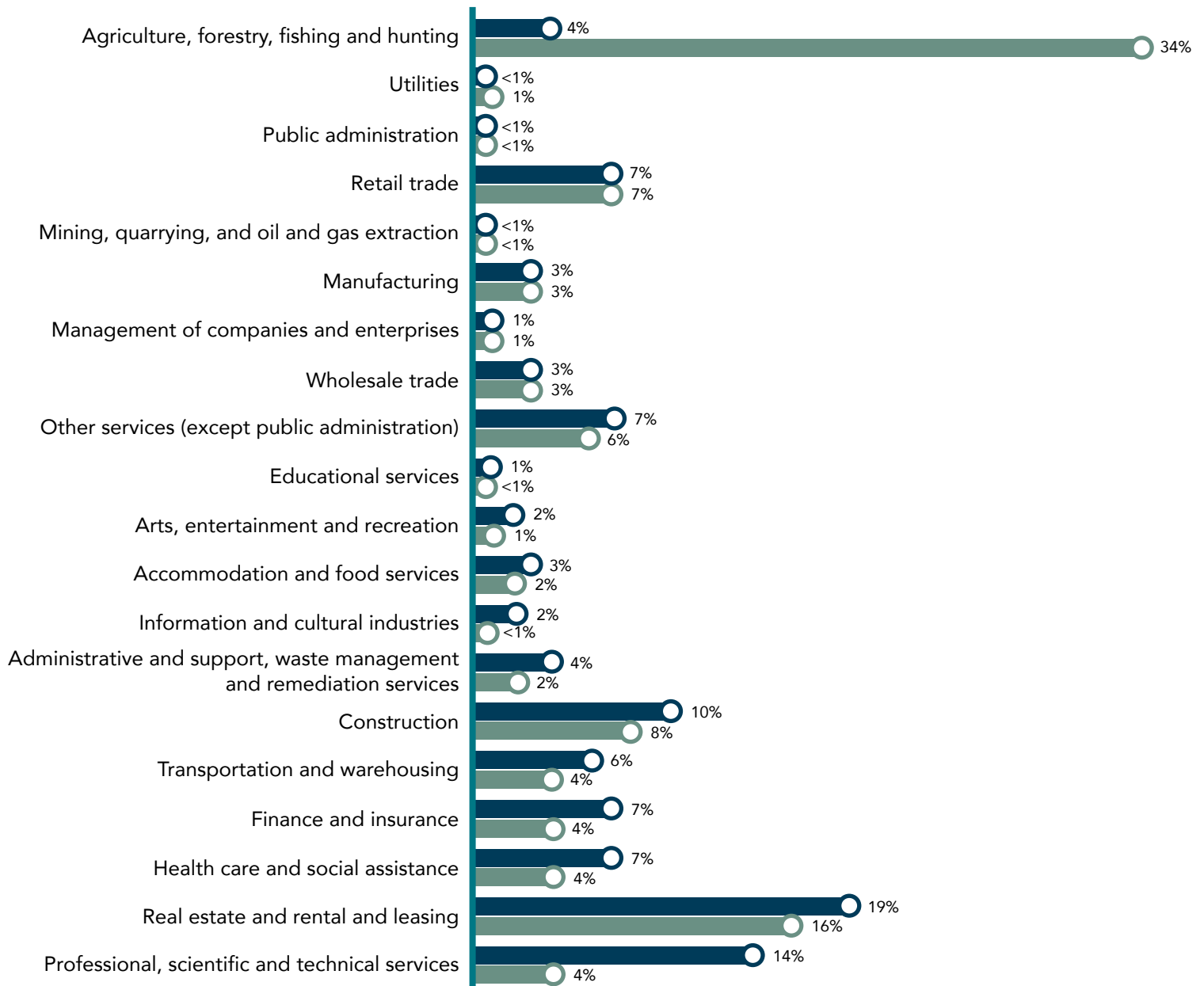
Employee Size Range	2016	2017	Absolute Change	Percentage Change
0	5,612	5,841	229	4.1%
1-4	1,094	1,068	-26	-2.4%
5-9	447	440	-7	-1.6%
10-19	300	306	6	2.0%
20-49	177	166	-11	-6.2%
50-99	52	46	-6	-11.5%
100-199	16	17	1	6.3%
200-499	9	9	0	0.0%
500+	1	2	1	100.0%
Total	7,708	7,895	187	2.4%

Similar to Bruce and Grey counties, Huron had a large number of classified businesses in Agriculture, forestry, fishing and hunting (2,673), making up 34% of all businesses in the catchment area. Among four counties, Huron County had the second largest number of Agriculture, forestry, fishing and hunting businesses with 1,344 crop production businesses and 1,167 animal production and aquaculture businesses. The concentrations of businesses in Utilities, Public administration, and Retail trade were 0.8%, 0.2%, and 7.2% respectively, and were marginally higher than those in Ontario.



## Business Concentration by 2-Digit NAICS - June 2017

○ Ontario ○ Huron





## Local Lens on HURON COUNTY

EmployerOne Survey

140 businesses in Huron County identified their workforce needs in this year's EmployerOne survey. This represents 19% of all survey responses from the Four County area, and 7% of all businesses in Huron County.

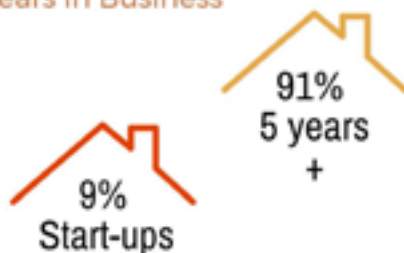
### Survey Key Findings



73% of employers hired in 2016 : 50% had hard-to-fill positions : 62% plan to hire in 2017

### Economic Profile

#### Years in Business

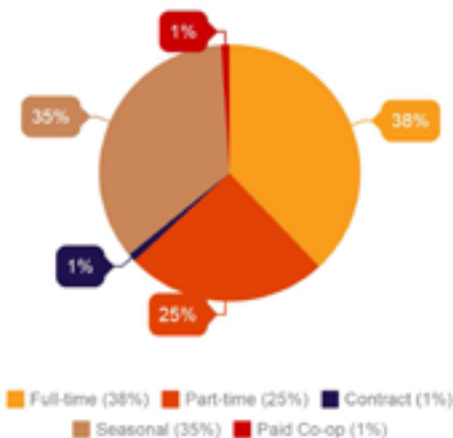


### Huron County Workforce



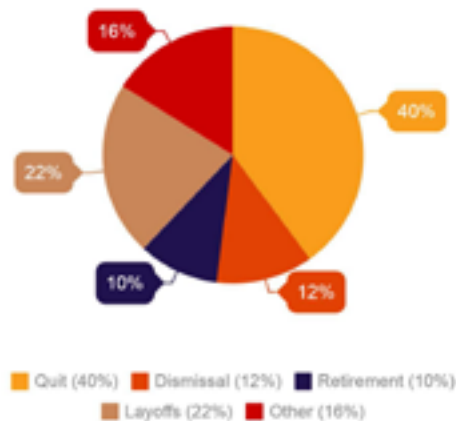
### Hiring Trends

101 employers filled **693** positions



### Retention Trends

90 employers experienced **561** separations





## Skill Shortage

Employers rate the availability of skilled workers as



## Hard-to-Fill Jobs

**30%** of employers have spend over a year trying to fill hard-to-fill jobs

Top 3 reasons positions were hard to fill:

- Not enough applicants
- Lack of motivation, attitude, or interpersonal abilities
- Lack of qualifications (education level/credentials)



Top 3 Competencies needed in hard-to-fill positions:

- Work ethic, dedication, dependability
- Self-motivated/ability to work with little or no supervision
- Teamwork/interpersonal ability

## Recruitment

Top Recruitment Methods



Word of Mouth



Newspaper ads



Online job boards/postings

Positions Filled in 2016

Labourer  
Truck Driver  
Cook

**Top 3**

## Training

**76%** of employers supported ongoing training

**24%** of employers could not support ongoing training

Top 3 Barriers to supporting training

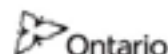


- Cost
- Loss of productivity during training time
- Relevant training not offered locally

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## Perth County

Perth County lost a net of 34 businesses with employees, with a notable decline of micro businesses (-53) partially offset by an increase in small businesses (+25). On the other hand, the number of medium businesses was down by 6.

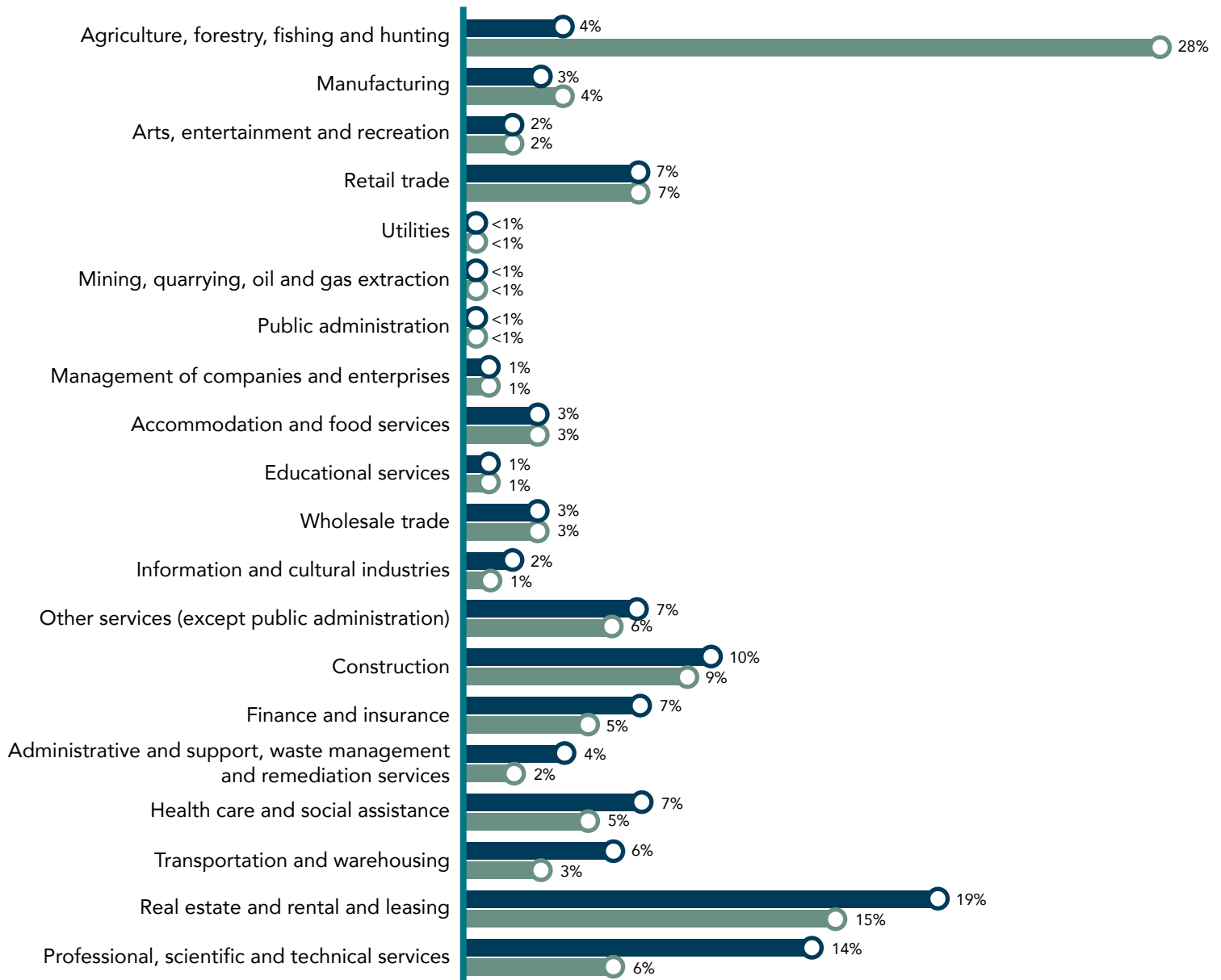
Employee Size Range	2016	2017	Absolute Change	Percentage Change
0	6,595	6,741	146	2.2%
1-4	1,475	1,422	-53	-3.6%
5-9	602	631	29	4.8%
10-19	408	402	-6	-1.5%
20-49	251	261	10	4.0%
50-99	92	84	-8	-8.7%
100-199	45	38	-7	-15.6%
200-499	17	18	1	5.9%
500+	7	7	0	0.0%
Total	9,492	9,604	112	1.2%

Perth County had 2,710 businesses in Agriculture, forestry, fishing and hunting, accounting for 28% of total businesses. Most Agriculture, forestry, fishing and hunting businesses worked on animal production and aquaculture (51%). The County's concentration in Agriculture, forestry, fishing and hunting businesses was significantly higher than Ontario, and its businesses in Manufacturing, Arts, entertainment and recreation, Retail trade, Utilities, and Mining, quarrying, and oil and gas extraction were more concentrated than Ontario's.



## Business Concentration by 2-Digit NAICS - June 2017

○ Ontario ○ Perth







## Local Lens on PERTH COUNTY

EmployerOne Survey

191 businesses in Perth County identified their workforce needs in this year's EmployerOne survey. This represents 26% of all survey responses in the Four County area, and 7% of all businesses in Perth County. Perth County includes Stratford (26% of responses) and St. Marys (23% of responses).

### Survey Key Findings



82% of employers hired in 2016 : 58% had hard-to-fill positions : 74% plan to hire in 2017

### Economic Profile

#### Years in Business

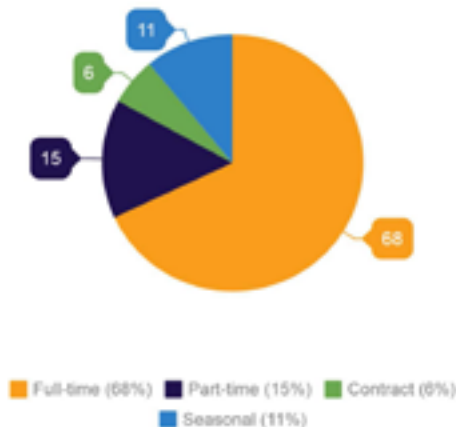


### Perth County Workforce



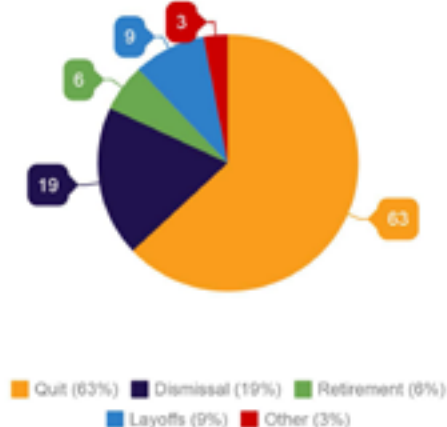
### Hiring Trends

153 employers filled **3224** positions



### Retention Trends

136 employers experienced **2595** separations







## Skill Shortage

Employers rate the availability of skilled workers as



## Hard-to-Fill Jobs

**24%** of employers have spent over a year trying to fill hard-to-fill jobs



### Top 3 reasons positions were hard to fill:

- Not enough applicants
- Lack of qualifications (education level/credentials)
- Lack of motivation, attitude, or interpersonal abilities

### Top 3 competencies needed in hard-to-fill positions:

- Work ethic, dedication, dependability
- Self-motivated/ability to work with little or no supervision
- Customer service

## Recruitment

### Top Recruitment Methods



### Positions Filled in 2016

Labourer  
Sales  
Customer service

**TOP 3**

## Training

**79%** of employers supported ongoing training

**21%** of employers could not support ongoing training

### Top 3 Barriers to supporting training



- Cost
- Loss of productivity during training time
- Relevant training not offered locally

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## Highlights from EmployerOne 2017

In total, 729 businesses in Bruce, Grey, Huron and Perth counties completed EmployerOne survey and shared their experience in the labour market. According to survey results, 68% of employers rated the availability of qualified workers as fair or poor. Additionally, 72% of employers hired in 2016 and most frequent occupations filled were:

- Sales
- Labourers
- Administrative Assistant/Administrative Support
- Cooks/Chefs
- Customer Service
- Retail
- Housekeepers
- Production Workers
- Servers
- Truck Drivers

In the Four County region, over 95% of surveyed employers indicated that they focused recruitment within the local area. The region has a tight labour market and its unemployment rate in 2017 was 4.5%, much lower than the provincial rate of 6%. It is recommended that employers consider remote recruitment when hiring for talent. Bruce, Grey, Huron and Perth counties experienced significant in- and out-migration with surrounding regions. Employers could start recruitment in top in-migration destinations such as Waterloo, Wellington, Simcoe, Middlesex and Toronto.

Bruce County had fewer separations that were quits (29%) and more that were layoffs (54%) than the Four County region average at 53% and 19% respectively. Only 68% of Bruce County employers supported ongoing training, compared to 74% overall in the region. Bruce County employers had fewer employees under 25 years (8%) than the regional average (16%) and fewer employees over 55 years (14%) than the average (22%).

Grey County employers hired more seasonal employees (43%) than the regional average of 25%. Fewer Grey County employers plan to hire in 2017 (55%) compared to the regional average of 63%. In terms of hiring experiences, 41% of Grey County employers had hard-to-fill positions, which is slightly lower than the regional average of 47%.

In Huron County, 66% of employers rated the availability of skilled workers as fair or poor, which is lower than the average of 68%. Moreover, 30% of surveyed Huron County employers spent over a year trying to fill hard-to-fill positions, and the rate is higher than the regional average of 25%.

A higher percentage of Perth County employers had hard-to-fill positions in 2016 compared to the regional average. Perth County employers experienced significantly more employee turnover than employers in other counties. Additionally, surveyed Perth County employers had more separations that were quits (63%) and fewer layoffs (9%) compared to the Four County region overall at 53% and 19% respectively.



## Bringing Research Findings into Practice

Annually, our Planning Board engages the community in a comprehensive consultative process which identifies, validates and prioritizes key labour market issues, opportunities and priorities that prevail in the local economy. The Planning Board delivers a minimum of four core partnerships annually but normally engages in more.

The Planning Board has been an active leader or a partner in workforce development initiatives in the Four County region, and we have been working collaboratively with economic development departments, municipalities, employment service providers, employers and other key stakeholders in the labour market. In 2017, we were involved in programs, partnerships or projects to address the specific needs of workforce development in Bruce, Grey, Huron and Perth counties.

### Workforce Development Initiatives in 2017

Program/Partnership/Project	Description	Deliverables
connect2SKILLS©	This program includes 4 weeks industry training and 2 weeks paid job placement.	Free 6-week training to prepare adults for jobs in the Manufacturing Sector. Locations in Stratford and Listowel.
Local Training Action Team	This partnership is formed as an Ad-Hoc committee to develop a community response to Bruce Power's Life-Extension program.	Roundtable discussions to develop strategies to strengthen regional training capacity and promote local employment opportunities.
Sector Partnership Planning in Manufacturing and Construction	This research project identified broad and specific labour market challenges affecting both Manufacturing and Construction sectors in Bruce, Grey and Huron counties.	A final report outlining key labour market trends; Recommendations and actions that address key labour market gaps and obstacles.
Sector Partnership Planning Hospitality and Tourism	This research project identified broad and specific labour market challenges affecting Hospitality and Tourism employers in Grey County.	A final report outlining key labour market trends; Recommendations and actions that address key labour market gaps and obstacles.
Immigration Recruitment	This partnership is formed to help Huron County recruit immigrants to meet shortage in labour supply.	Training, specifically English, workplace vocabulary, the workplace health and safety, to support newcomers find jobs in Huron County.



## Action Plan Update 2016 - 2017

### EmployerOne Survey

#### Goals

- 500 surveys completed by employers from across the Stratford-Bruce Peninsula Economic Region
- 30 partners signing the Memorandum of Understanding
- Distribute electronic survey results report through partner network
- 10 articles/stories in local media and social media

#### Activities

- Electronic survey distributed throughout the region in January 2017
- Utilize network plus partner network to reach the greatest number of companies/employers.
- Execute a marketing plan to advertise and utilize social media and partners to engage employers
- Utilize NFC marketing
- Informational graphics designed and distributed to public

Lead Staff: Sarah Pelton

Current Status: Completed

### Youth Strategy Round Table

#### Goals

- Collect information to form the foundation for the development of a Countywide youth strategy

#### Activities

- Document highlighting next steps and important considerations moving forward in the development of a Perth Youth Strategy
- 1 Round Table Session
- 50 key stakeholders participating

Lead Staff: Kay Uitvlugt

Current Status: Completed



## Mentorship - Huron

### Goals

- Build a mentorship program for successful workforce engagement
- Help people be more successful in the labour market
- Set protocols for entry into the program - Mentors & Mentees
- Mentorship Case Study program delivered

### Activities

- Cohesive process to mentoring that can be used across the County and with multiple organizations
- Case Study report

Lead Staff: Kay Uitvlugt

Current Status: Completed

## Small Business Training Pilot

### Goals

- 25 Businesses participate
- Trained employees
- Mobile learning lab test

### Activities

- Connecting employers to the training they need
- Offering an onsite service that helps employers meet their needs
- Survey of employers highlighting needs and challenges for training

Lead Staff: Kay Uitvlugt/Debbie Davidson

Current Status: Completed



## Action Plan 2017 - 2018

### EmployerOne Survey

#### Goals

- Conduct the annual EmployerOne Survey within a broad community partnership to gain demand-side local Labour Market Information
- Use the standard survey tool to allow for comparison with other geographical areas

#### Activities

- Distribute the electronic survey throughout Bruce, Grey, Huron, Perth regions in January 2018
- Use our contacts and partner networks to reach the greatest number of employers
- Build on our marketing plan to advertise and use social media to increase employer participation

Lead Staff: Sarah Pelton

Current Status: Ongoing

### Careers in Agriculture

#### Goals

- Raise the awareness of the agriculture jobs available locally and the training needed to get these jobs
- Market a bursary to support post-secondary training

#### Activities

- Career Fair in April 2017 with 214 students from eight high schools in Bruce and Grey counties
- A panel of 4 experts in the field describing careers in Agriculture from hands-on to tech
- Students toured business displays and interacted with 101 employers
- In-class presentations to highlight careers in Agriculture

Lead Staff: Debbie Davidson

Current Status: Completed



## Manufacturing Day and Healthcare Day

### Goals

- Increase students' awareness of interesting and rewarding careers in the manufacturing and healthcare sectors
- Disseminate modern manufacturing in action as well as existing supporting resources and organizations to Perth manufacturers

### Activities

- 27 people heard a presentation regarding additive manufacturing and a panel of four experts in manufacturing describing modern manufacturing in action and existing resources for businesses at a networking breakfast event
- 123 participants toured a local manufacturing plant and then heard panel discussions regarding incentives for students to go into manufacturing and important skills for a potential manufacturer worker
- Healthcare day tour in March 2018

Lead Staff: Claire Tian

Current Status: Ongoing

## Apprenticeship Completion Rate Improvement

### Goals

- Develop an apprenticeship completion strategy which encourages employers to hire apprentices
- Streamline supporting resources for apprentices and employers

### Activities

- A thorough analysis of primary and secondary data to identify barriers to apprenticeship completion from the perspectives of employers and apprentices, and explore best practices to improve apprenticeship completion
- Consult key stakeholders to gain extensive insights into challenges and practical recommendations
- Build an action plan and implement two action items

Lead Staff: Claire Tian

Current Status: Ongoing



## Long Range Action Items

At two focus group meetings in October 2017, both employers and service providers shared their insights into the challenges and opportunities in the regional labour market. The purpose of these discussions is to gain more extensive qualitative context into labour market issues.

The tables below outline practices and initiatives that address labour market issues identified by key stakeholders. Primary goals and proposed activities are listed as well. These initiatives will serve as a basis of the Planning Board's 2018-19 Strategic Plan.

### Proposed Initiatives

#### Local in-Demand Employment Opportunities

##### Goals

Clarity future high demand occupation and inform areas of prioritization for local workforce planning resources

##### Proposed Activities

- Conduct focus groups with Human Resource Departments and business owners to identify retirements per occupation within next five years
- Refer to the Canadian Census 2016 and measure the participation rate and employment rate by occupation using Ontario as a benchmark

Develop Career Profiles for most advertised jobs in the Four County region

- Explore the labour market trends by identifying in-demand careers based on sourced data
- Create Career Profiles including job opening trends, skills and training required

#### Sector Focused Skills Need and Gaps

##### Goals

Identify training and skills needs in top five sectors in the Region and develop strategies to address existing challenges and opportunities

##### Proposed Activities

- Consult employers in top sectors to identify skills gaps
- Research soft skill enhancement program
- Develop a skill upgrading plan with training priorities to address employers needs





## Labour Force Attraction and Retention

### Goals

### Proposed Activities

Increase awareness of sector employment opportunities and pathways

- Create career ladder for sectors experiencing labour shortage through consultations with appropriate stakeholders
- Develop sector career ladder with required training and skill levels in collaboration with employers and training delivery agencies

Explore talent attraction and retention strategies from the perspectives of employees

- Reduce the disconnect between what the workforce is experiencing and what employers are describing
- Provide a balanced view of both supply and demand sides of the labour market and identify where the gaps exist

## Regional Partnership Development

### Goals

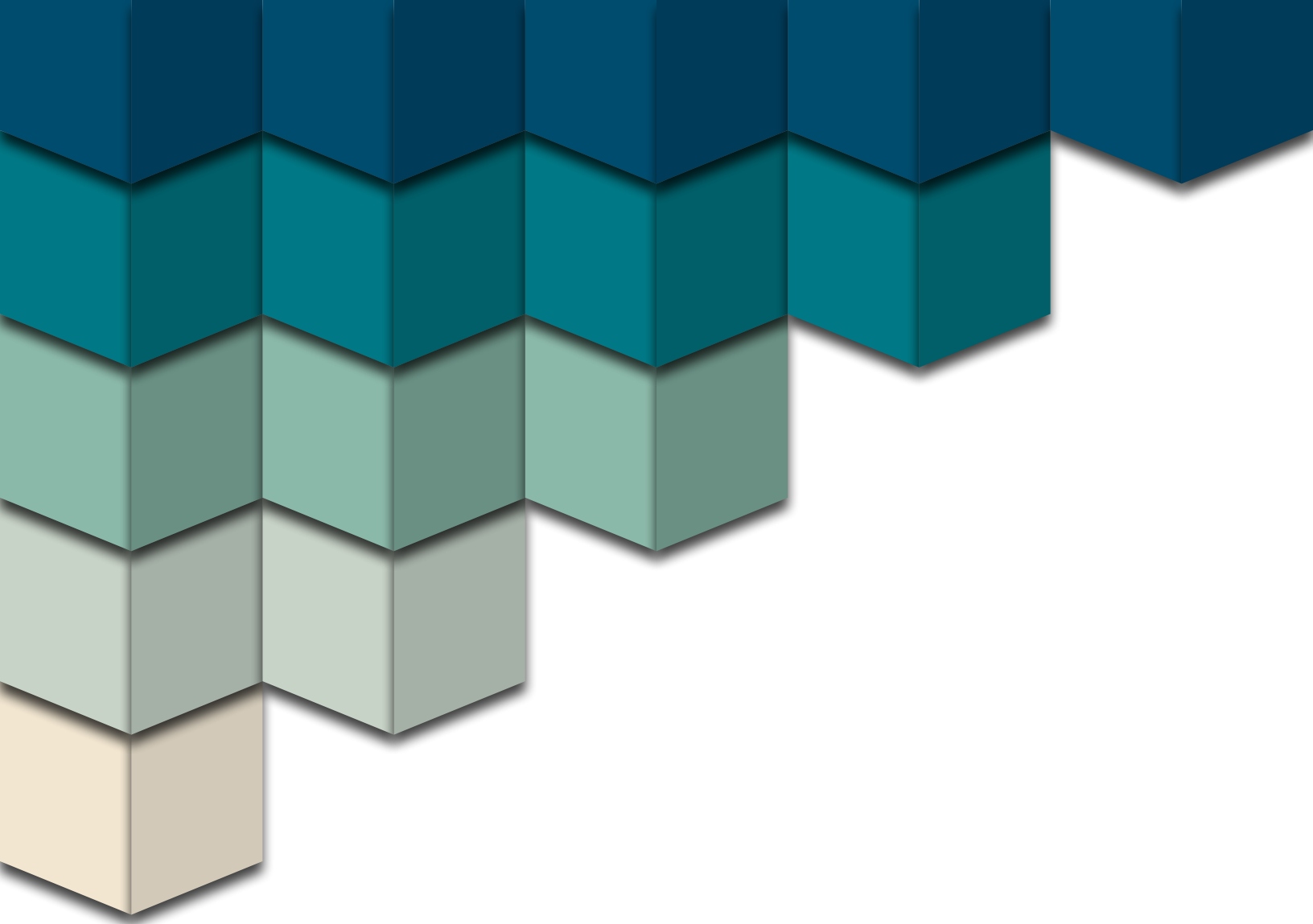
### Proposed Activities

Build meaningful partnerships by providing an environment for key stakeholders to engage in regional workforce development

- Connect employers with training needs to training delivery agencies through networking sessions
- Work with postsecondary institutions to facilitate the development of specific training programs







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FOUR COUNTY LABOUR MARKET PLANNING BOARD

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