A LENS ON THE LOCAL ECONOMY

Challenges, Opportunities and Priorities

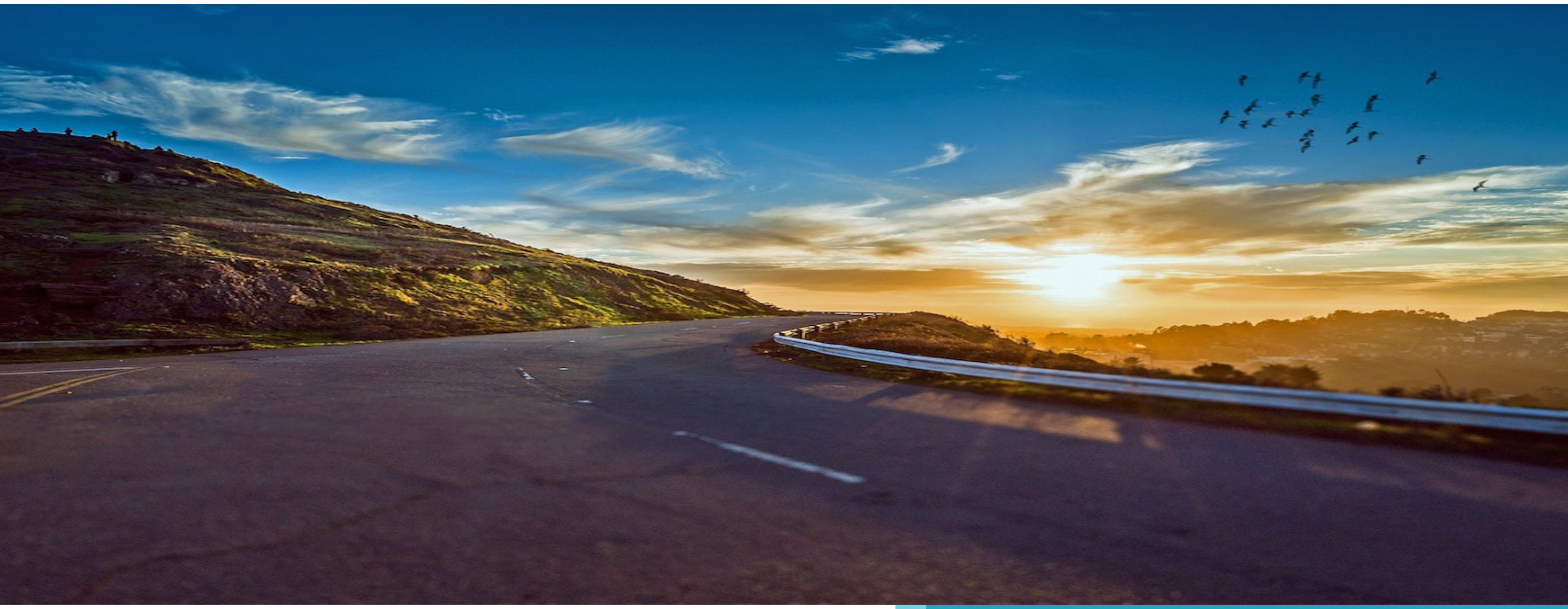
2018 - 2020

3 Year Plan

Local Labour Market Plan

Finding the right path to labour force development

Stormont, Dundas, Glengarry - Prescott, Russell



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LOCAL LABOUR MARKET THREE-YEAR PLAN
United Counties of Stormont, Dundas and Glengarry and
United Counties of Prescott and Russell
2018-2020

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EXECUTIVE SUMMARY

Since 2011, the Eastern Ontario Training Board has issued an annual report on the region's strategic activities promoting workforce development. Each year, community partners identify actions they will be undertaking to address five priorities focused on building a workforce that supports secure employment and economic growth. The release of Statistics Canada Census 2016 data provides the opportunity to assess our progress to date.

The following labour market supply and demand summary highlights statistical data from the 2016 Census, Canadian Taxfiler data (2016) and Statistics Canada Business Counts data released in June 2017.

Labour Market Supply and Demand Highlights

- The population in Stormont, Dundas and Glengarry (SDG) increased by 2% between 2011 and 2016 at the same time as the population in Ontario grew by 4.6%. The population in Prescott-Russell (PR) grew at the same rate as the province; however, growth was largely driven by urban sprawl in the National Capital Region affecting communities in the western quadrant of the region.
- The median age in the region at 47.1 in SDG and 44.3 in PR is older than in the province where the median age is 41.3.
- Net out-migration of individuals in key workforce demographics age 18 to 64 from SDG is a concern along with falling rates of immigrant attraction in both SDG and PR
- Labour force participation in SDG fell below 60%. In Ontario, 64.7% of the population participated in the labour force during the survey period of May 1 to May 6, 2016. Participation is higher in PR and unemployment at a low of 5.3%. However, 48.5% of the population in PR commutes to work outside of Prescott-Russell creating labour market demand for local businesses.
- In SDG, more than 46% of the population age 25 to 64 do not have post-secondary education. In PR, 42% of the population does not have post-secondary education. Fewer than 15% do not have a secondary school diploma.
- Throughout the region, a greater percentage of the population age 25 to 64 has a College diploma or Trades Certificate as compared to Ontario. Fewer than 20% has a university credential compared to 34.3% in Ontario.

Executive Summary (Continued)

- During the period from June 2016 and June 2017, the number of businesses operating in SDG grew by 128 with the greatest increase in the Financial, Insurance, Real Estate sector and Repair and Household Services. Business growth in PR remained stable during this time period with the greatest growth occurring in Health and Social Services and Repair and Household Services.
- There is a greater proportion of businesses operating in the Agriculture, Construction and Warehousing and Storage sectors regionally as compared to Ontario. There is also a greater percentage of the population working in these sectors locally as compared to Ontario.
- Occupationally, there are a greater percentage of individuals working in the Trades, Transport and Equipment Operators group as well as Natural Resources; Agriculture and Related Production Occupations as compared to Ontario.
- Employers responding to EOTB's EmployerOne survey are becoming increasingly concerned with the availability of workers locally. The number of local employers ranking worker availability as either "Excellent" or "Good" has fallen from 66.7% of respondents in 2015 to 34.8% in 2017.
- While occupations identified by employers as "Difficult to Fill" ranged from entry level positions to highly skilled, the most common reason cited by employers was "Candidates did not have the required qualifications" incorporating both technical and 'soft' skills.

This quantitative data and qualitative feedback has led to the development of a three-year Action Plan for regional workforce development focusing on the following four priorities:

1. Transitioning workers to meet labour market shortages by working with individuals currently looking for work to ensure they have the skills in demand.
2. Advancing workforce development and succession planning by encouraging those currently not in the workforce to pursue employment opportunities as well as attracting those from outside of the area. Actions also focus on assisting employers to retain and advance current and newly-hired employees.
3. Encouraging community planning that leverages talent and supports prosperity through ongoing collaboration with business, labour, educators, service providers and government.
4. Gathering, analyzing and communicating meaningful labour market information.

BACKGROUND

Since 2011, the Eastern Ontario Training Board (EOTB) has published an annual Local Labour Market Plan (LLMP) examining labour market supply, demand and changes in the economy of the Eastern Ontario region of the United Counties of Stormont, Dundas and Glengarry (SDG) and the United Counties of Prescott and Russell (PR). The Local Labour Market Plan 2018-2020 combines the analysis of Statistics Canada data and Employment Ontario program results with input from businesses, employment service providers and educators to create a three-year action plan addressing four key priorities:

1. Transitioning workers to meet labour market shortages.
2. Advancing workforce development and succession planning.
3. Encouraging community planning that leverages talent and supports prosperity.
4. Gathering, analyzing and communicating meaningful labour market information.

LABOUR MARKET SUPPLY

The release of Statistics Canada Census 2016 data over the past year offers new insights into local demographics and workforce characteristics. To better understand local labour market supply, our plan examines this updated data related to local population change, age characteristics, immigration levels, commuting patterns, labour force participation, education level and fields of study.

Table 1A highlights the population changes in SDG communities, the median age and the percent of the population in the key workforce demographic of age 25 to 65. While the population in Canada rose 5.0% and Ontario 4.6% between 2011 and 2016 population growth in SDG was stable at 2.0%. Like many rural communities, the median age in SDG at 47.1 is older than Ontario and Canada. The aging population affects workforce supply in the region. In Ontario and Canada 54% of the population is in the working age cohort age 25 to 64. In SDG as a whole 51.5% of the population is age 25 to 64.

Labour Market Supply (Continued)

Table 1A: Population Change and Age of Population in Stormont, Dundas and Glengarry					
	Population 2016	**Population 2011**	**% Change 2011–2016**	**Median Age**	**% Age 25 to 65**
South Stormont	13,110	12,617	3.9%	46.8	53.5%
North Stormont	6,873	6,775	1.4%	41.6	55.9%
North Dundas	11,278	11,225	0.5%	45.3	53.8%
Cornwall	46,589	46,340	0.5%	46.6	49.9%
South Dundas	10,833	10,794	0.4%	50.0	50.7%
South Glengarry	13,150	13,162	(-0.1%)	49.9	52.5%
North Glengarry	10,109	10,251	(-3.6%)	50.5	51.6%
Akwesasne	1,487	Unavailable	Unavailable	30.3	52.4%
SD&G Census Division	**113,429**	**111,164**	**2.0%**	**47.1**	**51.5%**
Ontario			4.6%	41.3	54.2%
Canada			5.0%	41,2	54.4%

Source: Statistics Canada Census 2016

Table 1B showcases the variation in the rate of growth in Prescott and Russell United Counties. The western area of the region continues to grow at a rate almost double that experienced in Ontario. This growth can be attributed to urban sprawl as the National Capital Region continues to grow. The population in this area is also younger. Despite this, declining and aging population in the eastern section of the area has resulted in the overall growth and percentage of the population age 25 to 64 in PR to fall in line with Ontario. The median age, however, remains older than Ontario and Canada.

Table 1B: Population Change and Age of Population in Prescott-Russell					
	Population 2016	**Population 2011**	**% Change 2011–2016**	**Median Age**	**% Age 20 To 65**
The Nation	12,808	11,668	9.8%	39.0	57.1%
Russell	16,520	15,247	8.3%	40.6	55.2%
Clarence Rockland	24,512	23,185	5.7%	42.2	55.6%
Alfred and Plantagenet	9,680	9,196	5.3%	46.6	55.3%
Champlain	8,706	8,573	1.6%	50.8	53.6%
East Hawkesbury	3,296	3,335	(-1.2%)	49.8	55.2%
Casselman	3,548	3,626	(-2.2%)	44.0	53.8%
Hawkesbury	10,263	10,551	(-2.7%)	52.5	50.7%
Prescott-Russell Census Division	**89,333**	**85,381**	**4.6%**	**44.3**	**54.9%**

Source: Statistics Canada Census 2016

Total Change PR = 4.6%

Attraction and retention of workers to the region continues to be an important contributor to creating a balance between labour market supply and demand. Tables 2A and 2 B summarize in and out-migration from the region by age demographics. The number of individuals moving in and out of SDG is relatively balanced, however, out-migration of the key demographics of individuals age 18 to 64 is a concern. Net in-migration into PR is a driver of population growth in the western section of the region.

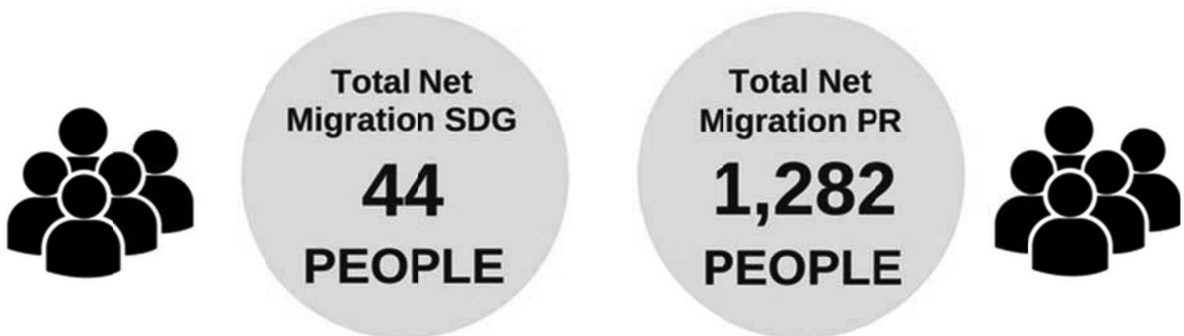
Table 2A: Net Migration – SDG 2010-2015

Age Group	In-migrants	Out-migrants	Net-migrants
0 – 17	3,452	2,975	477
18 – 24	1,700	3,115	(-1,415)
25-44	4,922	5,151	(-229)
45-64	3,809	2,801	1,008
65+	1,700	1,497	203

Table 2B: Net Migration – PR 2010-2015

Age Group	In-migrants	Out-migrants	Net-migrants
0 – 17	4,176	3,316	860
18 – 24	1,877	3,190	(-1,313)
25-44	6,756	5,986	770
45-64	4,168	3,501	667
65+	1,767	1,469	298

Source: Statistics Canada Taxfiler, 2016

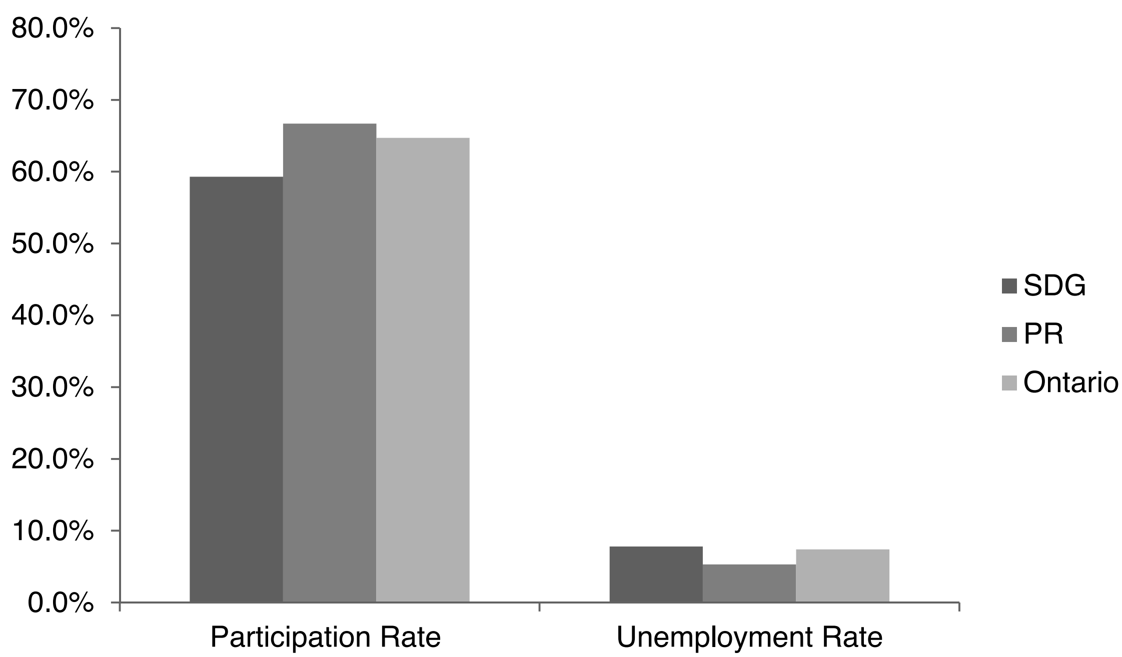


In SDG, there are 7,170 individuals who identified themselves as immigrants or 6.5% of the population. Four hundred of these or 5.6% moved to the area between 2011 and 2016. This is a decrease of 20% in the number who moved to the area between 2006 and 2011.

In Prescott-Russell, 4,030 people identified themselves as immigrants or 4.6% of the population. The number of immigrants has decreased by 36.9% since 2006. Between 2006 and 2011, 420 immigrants moved to the area; however, between 2011 and 2016, that number fell to 265. Faced with stagnant population growth that is aging, attracting and retaining immigrants is an important strategy for ensuring labour market supply meets demand.

Table 3A highlights labour force participation and unemployment levels in SDG and PR. At 59.3%, the participation in the labour force in SDG is considerably lower than in Ontario at 64.7%. The unemployment rate in SDG during the week of May 1 to May 7 2016 was 7.8%. In PR, labour force participation is 66.7% and unemployment very low at 5.3%.
The municipality of Cornwall has taken a proactive response to attracting workers to the community. Several agencies including Economic Development Services, Cornwall; Job Zone d'emploi; Glengarry Inter-Agency Group; Economic and Social Council of Ottawa-Carleton and the Eastern Ontario Training Board continue to take part in job fairs outside of the region. Economic Development Services, Cornwall has also published a handbook; "Your Guide to Cornwall" specifically geared to encouraging young families to consider opportunities in the area.

Chart 3A: Participation and Unemployment Rate 2016



Source: Statistics Canada Census 2016

Tables 3B and C, however, demonstrates that there are significant differences in labour market activity within the region. Self-employment, driven by the strength of the agricultural sector locally, is pronounced across most of SDG. High unemployment and a low level of participation in the labour force is noteworthy in Cornwall.

Table 3B: Activity of the Workforce in SDG

	Unemployment Rate*	Participa-tion Rate*	In 2015			
			Worked Full-time; full year	Worked Part-time or Part Year	Did not Work	Self-Employed**
Akwesasne* **	17.0%	41.9%	23.7%	19.4%	56.4%	4.5%
Cornwall	9.9%	53.2%	27.0%	27.3%	45.6%	7.2%
North Dundas	6.0%	68.1%	42.2%	28.9%	28.9%	13.9%
South Dundas	6.7%	52.9%	35.1%	25.1%	39.8%	15.1%
North Glengarry	7.2%	63.0%	34.6%	31.2%	34.2%	17.2%
South Glengarry	5.8%	63.0%	35.6%	29.8%	34.7%	17.0%
North Stormont	5.7%	71.8%	43.1%	32.4%	24.4%	15.9%
South Stormont	7.1%	63.8%	35.8%	32.0%	32.2%	10.0%
SDG Census Division	**7.8%**	**59.3%**	**33.0%**	**28.7%**	**38.4%**	**11.9%**

* Week of May 1 to May 6 2016
** Includes incorporated and unincorporated businesses with and without paid help
*** Completion of the Statistics Canada Census is optional for indigenous people. Results do not reflect the entire Akwesasne population living in Ontario
Source: Statistics Canada Census 2016

With the exception of Hawkesbury, most often participation rates in Prescott-Russell are higher and unemployment rates lower than what is observed in Ontario.

Table 3C: Activity of the Workforce in PR

	Unemployment Rate*	Participation Rate*	In 2015 Worked Full-time; full year	Worked Part-time or Part Year	Did not Work	Self-Employed**
Alfred and Plantagenet	6.5%	64.6%	37.5%	29.7%	32.7%	14.2%
Casselman	2.4%	66.3%	40.2%	29.3%	30.5%	8.6%
Champlain	6.0%	61.9%	33.1%	30.8%	36.0%	12.3%
Clarence Rockland	4.5%	68.4%	41.4%	29.6%	29.0%	10.6%
East Hawkesbury	7.5%	64.2%	34.1%	32.1%	33.9%	21.1%
Hawkesbury	9.6%	50.7%	23.9%	27.4%	48.7%	9.4%
Russell	4.1%	72.6%	46.0%	29.9%	24.1%	11.0%
The Nation	4.5%	74.9%	45.1%	31.9%	22.9%	12.8%
PR Census Division	**5.3%**	**66.7%**	**39.1%**	**29.9%**	**31.0%**	**11.8%**
Ontario	**7.4%**	**64.7%**	**34.8%**	**31.7%**	**33.5%**	**11.8%**

* Week of May 1 to May 6 2016
** Includes incorporated and unincorporated businesses with and without paid help
Source: Statistics Canada Census 2016

To further explore the thesis that population growth in PR is driven by expansion of the National Capital Region beyond Ottawa to neighbouring Prescott-Russell, we can examine commuting patterns within PR, from PR census sub-division to PR census sub-division (e.g. Hawkesbury to East Hawkesbury) or to a census sub-division outside of Prescott-Russell. Both the United Counties of Prescott and Russell and the United Counties of Stormont, Dundas and Glengarry are Census Divisions.

Table 4 highlights commuting patterns for SDG and PR. While some individuals in SDG may be working in PR and vice versa, it is a safe projection that communities like North Dundas in SDG and Clarence Rockland, Russell and The Nation are exporting more than half of their talent to other regions making labour market supply a challenge for companies located in Stormont, Dundas and Glengarry and Prescott-Russell.

Table 4: Commuting Patterns in SDG and PR*

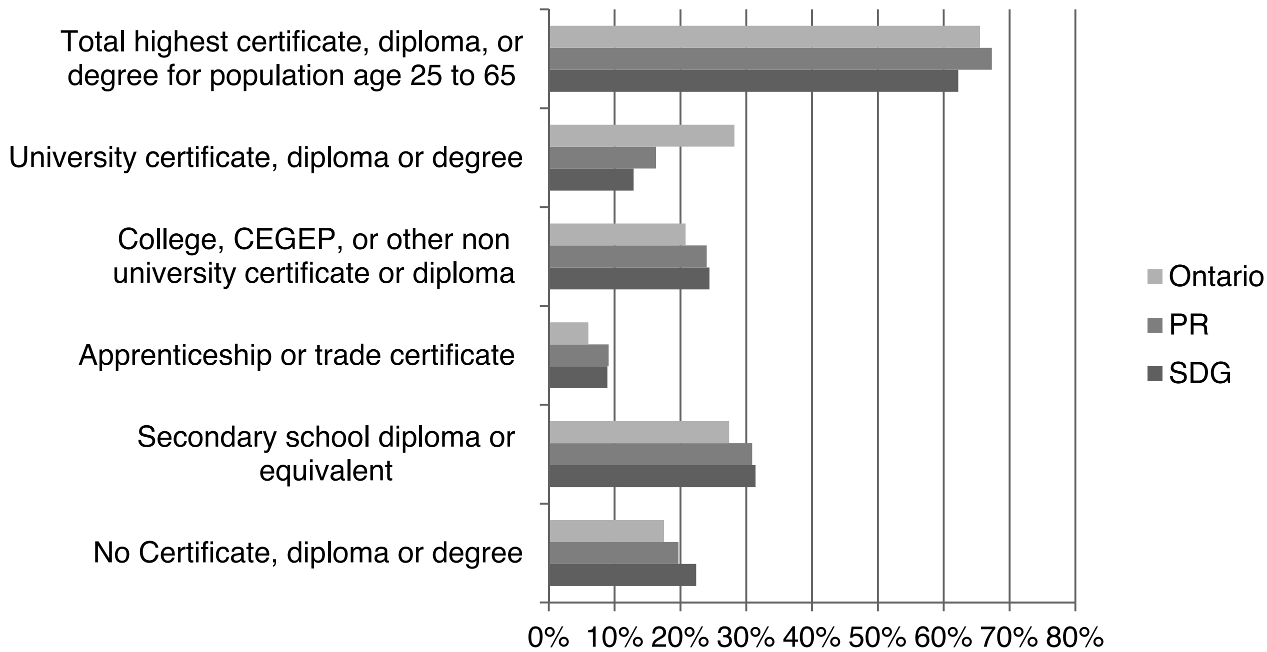
	Commute within the census sub-division (CSD) of residence	Commute to a different CSD within Census Division (CD) of residence	Commute to a different CD within Ontario
United Counties of Stormont, Dundas and Glengarry			
Akwesasne**	44.4%	31.1%	0.0%
Cornwall	81.7%	10.5%	5.6%
North Dundas CSD	30.1%	5.6%	63.6%
South Dundas CSD	39.3%	25.0%	34.4%
North Glengarry CSD	47.5%	21.1%	25.8%
South Glengarry CSD	20.9%	59.9%	6.5%
North Stormont CSD	15.3%	33.4%	48.9%
South Stormont CSD	18.6%	68.3%	10.6%
SDG Census Division CD	48.7%	27.5%	20.0%
United Counties of Prescott and Russell			
Alfred and Plantagenet CSD	22.6%	34.5%	37.6%
Casselman CSD	29.0%	18.2%	48.4%
Champlain CSD	26.2%	50.5%	12.7%
Clarence Rockland CSD	25.5%	5.4%	64.2%
East Hawkesbury CSD	15.6%	45.9%	10.2%
Hawkesbury CSD	60.5%	20.8%	7.7%
Russell CSD	20.2%	6.6%	69.5%
The Nation CSD	14.5%	25.5%	55.7%
PR Census Division CD	25.7%	19.3%	48.5%

** Percentages for each CSD do not add to 100. The remaining percentage of the workforce works outside of Ontario

* Completion of the Statistics Canada Census is optional for indigenous people. Results do not reflect the entire Akwesasne population living in Ontario

Source: Statistics Canada Census 2016

Chart 5: Education Levels in SDG, PR and Ontario



Source: Statistics Canada Census 2016

The 2016 Statistics Canada Census also examined educational attainment in the area. Table 5 identifies the highest certificate, diploma or degree of the working age population age 25 to 64 in 2016. The region continues to have a larger percentage of individuals without an Ontario Secondary School Diploma or who have an OSSD or equivalent but no post-secondary education. An increasing percentage of individuals with either an Apprenticeship Trades Certificate or a College certificate or diploma is a positive indicator for workforce development. However, focusing on increasing the number of individuals with a university degree is an important priority for both workforce and economic development in an increasingly knowledge-based economy.

Table 6 identifies the fields of study in PR and SDG as compared to Ontario.

Table 6: Fields of Study in SDG, PR and Ontario			
Field of Study	**SDG 2016**	**PR 2016**	**ON 2016**
Education	6.3%	7.8%	5.2%
Visual and Performing Arts & Communication Technologies	2.6%	2.6%	4.1%
Humanities	3.0%	3.6%	5.7%
Social and Behavioural Sciences and Law	10.2%	11.2%	13.8%
Business, Management and Public Administration	19.0%	19.3%	21.8%
Physical and Life Sciences and Technologies	2.3%	2.1%	4.0%
Mathematics, Computer and Information Sciences	2.8%	4.7%	5.4%
Architecture, Engineering and Related Technologies	21.9%	21.7%	18.7%
Agriculture, Natural Resources, and Conservation	4.1%	3.1%	1.8%
Health and Related Fields	18.4%	14.4%	14.2%
Personal, Protective and Transportation Services	9.5%	9.6%	5.5%

Source: Statistics Canada Census 2016

In an article published by the Standard Freeholder earlier this year, the increased number of residents of SDG with post-secondary education was highlighted. Health care is the most common field of study in the area to date while the fastest growing area of study is Social and Behavioural Sciences and Law which grew by 45% since 2006. With the increasing impact of automation, the decrease in the number of graduates in Architecture, Engineering and Related Technologies as well as Mathematics, Computer and Information Sciences is of concern[1].

LABOUR MARKET DEMAND

To better understand the composition of the region's economy and labour market demand, we combine an analysis of statistical data with feedback directly from employers. Canadian Business Counts data published by Statistics Canada twice annually in June and December provides information about the numbers of businesses operating by sector.

In the one year period from June 2016 to June 2017, the number of businesses operating in SDG increased by 128 businesses (1.4%) from 9,461 to 9,589. The greatest increase took place in the Finance, Insurance and Real Estate sectors and Repair and Household Services.

[1] 2016 Census shows slight increase in number of Cornwallites who've attended post-secondary schools, Todd Hambleton, Cornwall Standard Freeholder, November 29, 2017, p. 1

During the same period, the number of businesses operating in PR remained relatively stable with an increase of 4 businesses increasing from 8,388 to 8,392. The greatest increase in businesses took place in the Health and Social Services and Repair and Household Services sectors.

Owner-operated businesses make up a significant percentage of businesses in both SDG and PR. In Prescott-Russell, 5,920 or 70.5% of businesses are operated by individual owners with no employees. In SDG, 6,505 or 67.8% of businesses are owner-operated. The largest private sector companies in the region operate in manufacturing, retail, transportation and warehousing.

Table 7 identifies the predominance of the number of businesses operating in the Agricultural and Construction sectors regionally. There is also a greater proportion of Warehousing and Storage operations locally as compared to Ontario.

Table 7: Composition of the SDG, PR and ON economies

Sector	Percent of Total SDG Economy	Percent of Total PR Economy	Percent of Total ON Economy
Agriculture	15.80	12.02	3.62
Oil/Gas Extraction and Mining	0.12	0.13	0.14
Utilities	0.35	0.45	0.22
Construction	11.25	17.34	10.25
Manufacturing	2.73	2.12	2.77
Wholesale Distribution	2.89	2.40	3.14
Retail	8.41	6.89	7.14
Transportation	4.22	2.70	5.83
Warehousing and Storage	0.28	0.20	0.14
Info and Communication	0.71	0.68	1.58
Finance, Insurance and Real Estate	22.54	22.93	25.62
Professional, Scientific & Technical	7.46	9.32	14.38
Management and Admin. Services	3.76	4.15	5.12
Education	0.74	0.68	1.17
Health Care and Social Assistance	5.66	6.19	7.09
Arts, Culture, Sports and Recreation	1.43	1.30	1.69
Food and Accommodation	3.60	2.54	3.30
Repair and Personal Services	7.88	7.77	6.68
Public Administration	0.19	0.20	0.12

Source: Statistics Canada, Canada Business Counts, June 2017

The Statistics Canada Census 2016 provides insights into the numbers employed within these industries. This information is summarized in Table 8. Congruent with the greater number of businesses operating in Agriculture, Construction and Transportation and Warehousing, there is a greater percentage of the population working in these sectors locally. The greater percentage of individuals residing in Prescott-Russell working in Public Administration can likely be attributed to people working in the National Capital region.

Table 8: Labour Force Participation by Industry in SDG, PR and ON

	SDG	PR	Ontario
11 Agriculture; Forestry; Fishing and Hunting	4.8%	3.7%	1.5%
21 Mining; Quarrying; and Oil and Gas Extraction	0.2%	0.2%	0.5%
22 Utilities	0.8%	0.3%	0.7%
23 Construction	8.9%	11.1%	6.8%
31-33 Manufacturing	9.8%	6.6%	9.8%
41 Wholesale Trade	3.5%	3.0%	3.9%
44-45 Retail Trade	13.2%	11.1%	11.2%
48-49 Transportation and Warehousing	6.7%	4.8%	4.7%
51 Information and Cultural Industries	1.1%	1.2%	2.5%
52 Finance and Insurance	2.2%	2.9%	5.5%
53 Real Estate and Rental and Leasing	1.4%	1.1%	2.1%
54 Professional; Scientific and Technical Services	3.7%	4.4%	8.1%
55 Management of Companies and Enterprises	0.1%	0.1%	0.2%
56 Admin./Support; Waste Management, Remediation Serv.	4.6%	4.3%	4.9%
61 Educational Services	6.3%	8.2%	7.6%
62 Health Care and Social Assistance	13.3%	11.2%	10.8%
71 Arts; Entertainment and Recreation	1.7%	1.6%	2.1%
72 Accommodation and Food Services	6.3%	5.1%	6.9%
81 Other Services (Except public administration)	4.4%	4.6%	4.3%
91 Public Administration	6.8%	14.5%	6.0%

Source: Statistics Canada Census 2016

Data on the occupations that employ the local workforce in 2016 is summarized in Table 9.

Table 9: Labour Force Participation by Occupation in SDG, PR and ON			
	SDG	**PR**	**Ontario**
0 Management Occupations	10.7%	11.0%	11.3%
1 Business, Finance, and Administration Occupations	13.8%	17.8%	16.1%
2 Natural and Applied Sciences and Related Occupations	4.0%	5.9%	7.4%
3 Health Occupations	7.3%	5.9%	6.4%
4 Education; Law and Social; Community, Government Service	10.6%	13.5%	11.9%
5 Occupations in Art, Culture, Recreation and Sport	1.8%	1.9%	3.2%
6 Sales and Service Occupations	23.1%	20.5%	23.4%
7 Trades; Transport, Equipment Operators and Related Occ'ns	20.1%	18.1%	13.3%
8 Natural Resources; Agriculture and Related Prod'n Occ'ns	2.8%	2.6%	1.6%
9 Occupations in Manufacturing and Utilities	5.8%	2.9%	5.2%

Source: Statistics Canada Census 2016

There is a greater percentage of individuals working as Trades; Transport and Equipment Operators and Related Occupations and in Natural Resources; Agriculture and Related Production Occupations regionally as compared to Ontario.

In the coming months, the Eastern Ontario Training Board will be provided with customized census data tables which will allow us to analyze the demographics for individual occupations including the age of the current workforce, education levels and median income rates. This information will be summarized and shared on our website, www.labourmarketinfo.com.

Since labour market shortages have a tendency to result in upward pressure on wages, median income levels can be considered another indicator of labour market demand.

Median Income in SDG & PR Communities

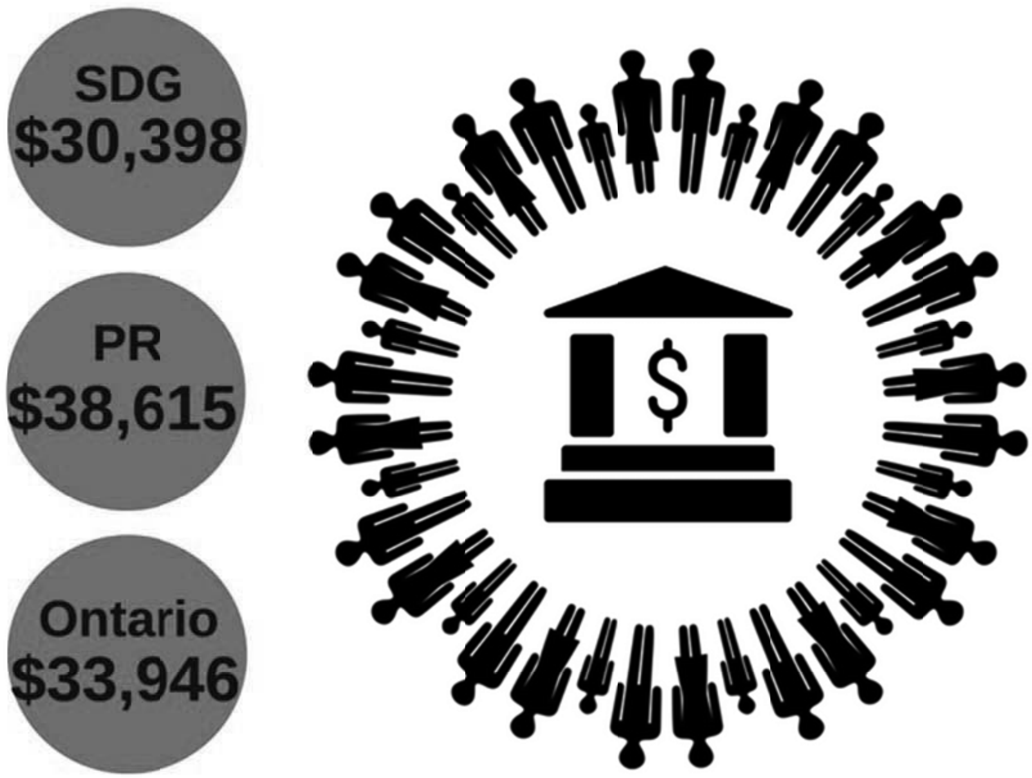


Table 9 highlights that the median employment income levels in SDG and PR for 2015 were lower than in Ontario however, there are communities such as North Dundas and South Stormont in SDG where employment income is higher. In Prescott-Russell, the median employment income is higher in the western section of the area.

Table 9: Median 2015 Employment Income Rates – Stormont, Dundas and Glengarry			
Geography	**Median Total Employment Income**	**Median Total Employment Income – Male**	**Median Total Employment Income - Female**
Stormont, Dundas and Glengarry	**$30,398.**	**$34,543.**	**$26,570.**
Akwesasne	$24,224.	$27,093.	$21,824.
Cornwall	$26,306.	$29,150.	$23,564.
North Dundas	$35,907.	$41,549.	$31,122
North Glengarry	$30,763.	$35,235.	$26,240.
North Stormont	$35,989.	$41,173.	$30,912.
South Dundas	$30,464.	$35,445.	$25,888.
South Glengarry	$32,966.	$37,478.	$29,312.
South Stormont	$34,565.	$40,562.	$29,584.
Prescott-Russell	**$38,615.**	**$43,492.**	**$33,880.**
Alfred and Plantagenet	$36,123.	$40,308.	$31,536.
Casselman	$41,237.	$44,109.	$38,272.
Champlain	$33,525.	$38,016.	$29,376.
Clarence Rockland	$42,579.	$47,704.	$37,499.
East Hawkesbury	$28,320.	$32,448.	$24,992.
Hawkesbury	$25,577.	$28,454.	$22,801.
Russell	$46,491.	$52,846.	$40,560.
The Nation	$40,919.	$44,849.	$35,945.
Ontario	**$33,946.**	**$39,490.**	**$29,413.**
Canada	**$33,684.**	**$39,836.**	**$28,474.**

Source: Statistics Canada Census 2016

Recent research has turned a spotlight on the impact of automation and the importance of digital literacy. Advanced robotics performing routine work is evolving to incorporate artificial intelligence and machine learning allowing automation of non-routine tasks in sectors like sales and service and office support. A study released by the Brookfield Institute (2016) built on previous research of Frey and Osborne (2013) and McKinsey and Company (2015) to identify the probability of an occupation being automated within the next ten to twenty years and the proportion of tasks within each occupation most likely to be affected. The sectors most likely to be significantly impacted by automation in the next twelve years are Transportation and Warehousing, Manufacturing and Accommodation and Food Services. These sectors combined employ almost 23% of the region's workers today.

Both federal and provincial governments are turning their attention to the impact of automation on job creation and transition. Learning Nation: Equipping Canada's Workforce with Skills for the Future, recommends employers, individuals and governments invest in skills development.

They advocate that Skills Plans for working Canadians be a joint effort of all partners, include innovative and agile programs with seamless access. The plan should prioritize those with the highest need and include tailored training approaches[2].

Appendix One provides a summary of the occupations that employ the greatest number of people in the SDG and PR region, the probability those occupations will be impacted by automation in the next ten to twenty years and the proportion of tasks within each occupation that will be affected. Also identified is the percentage of the population working in each occupation that is age 34 and younger.

COMMUNITY CONSULTATION – EMPLOYERS

In addition to analyzing statistical data, the Eastern Ontario Training Board gathers information about labour market supply and demand by consulting with employers. During the past year, EOTB has consulted with over 350 employers representing Agriculture; Construction and Utilities; Manufacturing; Wholesale and Retail Trade; Transportation and Warehousing; Finance, Insurance and Real Estate; Professional, Scientific and Technical; Education; Health Care and Social Assistance; Arts, Culture and Recreation; Food and Accommodation; and Repair and Personal Services. The greatest labour market demand identified as a result of this contact was in the Construction, Manufacturing, Warehousing and Health Care sectors. Skills in the greatest demand continue to be the Essential Skills related to dedication (work ethic) and inter-personal communication.

Given the growing number of manufacturing firms in the region as well as the substantial turnover in the sector, EOTB directed significant attention to this sector interviewing

[2] Learning Nation: Equipping Canada's Workforce with Skills for the Future, Advisory Council on Economic Growth, Dec 1 2017, p. 15-16.

representatives from fifteen local companies. Overall, representatives of these businesses are not concerned with the number of applications they receive for entry-level openings; their concern focused on the quality of the candidates. Employers indicated a perceived lack of motivation, dedication and loyalty. Not only is attendance a problem, employees failed to

contact their employers to let them know they would not be at work. Candidates for employment often do not present themselves well when meeting with a potential employer. They are ill-prepared for a job interview and often not dressed appropriately.

Despite their orientation practices, manufacturers indicated that entry-level employees often did not understand 'the big picture' related to their company's needs; the plant's products and operations; or the opportunities available to them. Candidates did not seem to understand what they were getting into.

Some employers have begun showing preference to older workers as they felt these individuals demonstrated a stronger work ethic and a better 'communication connection' could be achieved than with younger workers. However, older workers can experience difficulty in keeping up with the work.

To better appreciate manufacturers' skill requirements for entry-level workers, the Eastern Ontario Training Board had the employers respond to an inventory of entry-level skills compiled through the assistance of the Canadian Manufacturers and Exporters and instructors at St. Lawrence College of Applied Arts and Technology. The skills ranged from literacy and numeracy to health and safety, communication, teamwork and problem-solving skills to technical proficiencies. Employers rated the skills as "Mandatory at Start"; "Preferred by not Mandatory"; "Will train on Site" and "Not Applicable". Employers were most likely to view literacy and numeracy as well as basic Essential Skills like communication and teamwork skills as mandatory upon employment. Problem-solving and manufacturing operations technical skills were mostly likely to be provided by the employer on-site.

As well as interviewing business owners, EOTB continued to conduct their EmployerOne survey. During 2017, 68 SDG and PR employers from ten different sectors participated in a survey measuring the number of lay-offs and hiring that have took place in the past year. Employers were also asked to identify occupations that were difficult to fill as well as occupations they intend to hire in the coming year. Over 58% of respondents indicated they had positions that were difficult to fill in the past year. These positions were wide-ranging from General Labourer to Skilled Trades to Sales to Managers. More than 90% of respondents

indicate they plan to hire in the coming year. Again, hiring requirements reflected the same occupational range as those hired in the past year.

Of 66 respondents, 23 (34.8%) identified the availability of workers locally as either Excellent or Good; 24 (36.4%) ranked the availability as ‘Fair” and 19 (28.8%) ranked availability as “Poor”. Since launching the EmployerOne survey in 2014, employers’ assessment of worker availability has steadily declined.

Employers expressed their frustration both with the inability to find workers with the necessary technical skills but most concerns focused on motivation and communication skills. A full analysis of the EmployerOne survey results will be released in April 2018.

COMMUNITY CONSULTATION – EMPLOYMENT ONTARIO DATA SHARE

Since 2014, Employment Ontario has been providing each region with a summary of results of Employment Ontario services in the past year. In 2017, Employment Ontario provided an expanded set of information for SDG and PR. In addition to Employment Services, Literacy and Basic Skills, Apprenticeship and Second Career results, more detailed information specific to Canada Ontario Job Grant and Youth Skills Connection program results for 2016-2017 was provided. The objective for the additional information was to encourage evidence-based discussions about service issues and to allow the service network to plan coordinated actions to address these issues.

Highlights of the Employment Ontario programs’ regional results achieved from Apr 1 2016 to Mar 31 2017 include:

Apprenticeship

- Since reaching a high benchmark in 2015, the number of new registrants and active apprentices has decreased.
- The number of Certificate of Apprenticeships / Qualifications issued at 347 in 2016/17 has remained stable since 2015.
- The number of modular training registrations has decreased from 113 to 64 (43.4%).

Employment Services

- The number of individuals visiting Employment Services for referral and information services has increased by 78% from 3,253 to 5,788 in the period from 2015 to 2017.
- The number of individuals receiving more in-depth services during this time has decreased by 3% moving from 4,823 to 4685 during 2016-2017. The number of assisted clients has been decreasing since 2014.
- The greatest labour market churn affecting Employment Service clients in the region occurred in Retail with 552 lay-offs and 228 hires; Manufacturing with 525 lay-offs and 251 hires; and Accommodation and Food Services with 516 lay-offs and 134 hires. There were 980 fewer Employment Service clients hired than laid-off from these industries.
- Occupationally, 434 individuals working in Service Support occupations regionally were laid off and 139 were hired. An additional 300 were laid off from occupations in Sales Support with 114 hired. There were 288 clients employed as Trades Helpers who experienced lay-off in the past year while 87 clients were hired. Finally, 275 Labourers in Manufacturing sought Employment Services assistance as a result of lay-off while 192 were hired. In total, 765 fewer Employment Services clients were hired in these occupations as compared to those seeking Employment Services assistance after lay-off from these occupations.

Literacy and Basic Skills (LBS)

- While the number of carry-over LBS clients has increased by 13% in the past two years, the number of new learners has decreased by 27 learners (4.7%).
- 600 or 63% of LBS learners are participating in LBS to secure employment while 18% are focused on post-secondary education. In Ontario, the opposite is true. More than 38% identify post-secondary education as their goal compared to 30% who are seeking employment.

- Just over 41% of referrals made to other services by LBS are for employment services. While more than one in four Employment Services clients do not have a secondary school diploma, only 18% of jobseekers are referred to Literacy and Basic Skills by Employment Services.
- As confirmed by service providers, the co-location of Employment Services and LBS in some Prescott-Russell centres facilitates referrals as the rate of referrals is much greater in Prescott-Russell.

Second Career

- The number of individuals locally who participate in Second Career training continues to decline. There were 125 Second Career participants in 2016-2017 as compared to 194 in 2015-2016, a decrease of 36%. This equates to 2.7% of Assisted Employment Services clients regionally.
- More than 88% of Second Career participants were employed within one year of graduation.
- 44 of the 125 Second Career participants (35%) took part in Truck Driving training while 13 (10.4%) participated in Nurses Aid instruction. Data for the remaining clients was suppressed to preserve confidentiality.
- Across Ontario, Second Career participation was provided in 240 different post-secondary programs.

Youth Job Connection

- 312 SDG and PR youth participated in the Youth Job Connection program.
- 141 of the youth or 47% had no source of income while 120 (40%) relied on Social Assistance.

Canada Ontario Job Grant (COJG)

- 193 companies in the region made use of the Canada Ontario Job Grant and 752 individuals received training through the program.
- 83 of the companies (43%) indicated the training improved the trainees' productivity.
- 34 of the companies (18%) indicated the training met their workforce needs.

- Of the 182 companies responding, 88 (48.4%) received training from a product vendor and 75 (41.2%) from a private career college. The remaining 19 (10.4%) received training from a public college.

Employment Ontario service providers in both SDG and PR acknowledge that, as the unemployment rate falls, it is becoming increasingly difficult to attract clients and achieve targets. CSEPR identified more than 400 job postings in their area currently going unfilled. Furthermore, it is often the same people who are repeatedly seeking services. It was agreed that coordinated efforts to market their services would be beneficial. Examples cited included leveraging social media and continued participation in job fairs.
Discussion focused on feedback from employers that jobseekers participating in job fairs were not well prepared. For example, often their clothing choices and responses to employers' questions were often unprofessional. One strategy discussed was a collaborative 'job fair prep'

for clients as well as work to reduce high rates of turnover by assisting individuals maintain their job once hired.

While employers' criticisms are often warranted, there are actions employers could take such as considering those with a disability that would increase the number of viable candidates for employment. Feedback from jobseekers about why they left their previous job often focuses on concerns with their supervisor. Enhancing communication between worker and employer would help with employee retention. A possible strategy to assist jobseekers to retain employment and help companies reduce turnover would be for services to collaborate on developing and delivering a workshop, "The Top Ten Reasons Why Employee Turnover is So High". Incorporating an employer who has succeeded in retaining workers who could champion the benefits to his/her company would be a beneficial addition.

The lack of quantity and diversity in the number of post-secondary training programs locally were viewed as barriers to clients' participation in both Apprenticeship and Second Career programs. If service providers could identify a suitable number of learners locally and the requisite labour market demand, the college could be approached about making a specific program available.

The Way Forward

Both quantitative data and qualitative feedback point to a growing economy becoming increasingly constrained by constricted labour market supply. Stagnant population growth, an aging population, low levels and labour force participation and net out-migration in some areas and a declining number of immigrants choosing to locate in the area all negatively impact labour market supply.

This tight labour market supply is reflected in employers' own view of the availability of workers locally. In 2015, two of every three employers ranked the availability of workers in SDG and PR as either Excellent or Good. In 2016, that percentage fell to 53.6%. In 2017, only 34.8% of employers identified the availability of workers locally as Excellent or Good. Reasons for the ranking ranged from not enough qualified applicants to applicants not having the required technical and 'soft' skills.

Despite these challenges, there are opportunities. Feedback provided by employers highlight existing and projected job openings at all skills levels. This means, there are opportunities available for those looking for work and those who are not currently in the workforce.

The following three-year plan, focuses on collaborative efforts to create a workforce that meets local labour market demand by attracting new workers to the area, reaching out to those currently not looking for work or who face barriers to employment, providing targeted soft and technical skills development and leveraging opportunities for experiential learning. Actions also focus on working with employers encouraging them to consider individuals with barriers to employment as well as strategies for developing and retaining employees.

The Action Plan focuses on the following priorities:

1. Transitioning workers to meet labour market shortages by working with individuals currently looking for work to ensure they have the skills in demand.
2. Advancing workforce development and succession planning by encouraging those currently not in the workforce to pursue employment opportunities as well as attracting those from outside of the area. Actions also focus on assisting employers to retain and advance current and newly-hired employees.
3. Encouraging community planning and leverages talent and supports prosperity through ongoing collaboration with business, labour, educators, service providers and government.
4. Gathering, analyzing and communicating meaningful labour market information.

LOCAL LABOUR MARKET ACTION PLAN 2018-2020

Key Priority # 1 – Transitioning workers to meet labour market shortages					
			Timeframe *		
Action	**Outcomes**	**Partners****	**S**	**M**	**L**
Coordination of employment programs to ensure efficient delivery of top-quality services effectively meeting the needs of jobseekers and those pursuing skills development.	ES and LBS providers to meet quarterly to identify service gaps/improvements and to enhance linkage to other services.	SCG	✓	✓	✓
Delivery of annual training workshops for employment services front-line workers to build skill, share information and network.	Minimum of one workshop delivered annually each year.	SCG	✓	✓	✓
Deliver short-term training and work experience opportunities helping people with disabilities secure employment.	52 participants all within a designated group e.g. women, older worker, etc. A minimum of 34 employed or returning to school.	EOTB, SC, JZ, GIAG, ODSP, OW, SLC	✓	✓	
Deliver short-term training and work experience opportunities helping at-risk youth secure employment.	64 participants, 35 either female or indigenous. A minimum of 47 employed or returning to school.	EOTB, SC, JZ, GIAG, ODSP, OW, SLC	✓	✓	

Key Priority # 2 – Advancing workforce development and succession planning					
			Timeframe *		
Action	**Outcomes**	**Partners****	**S**	**M**	**L**
Host an employer training session on “Mental Health in the Workplace” during Small Business Week	Collaborative development and delivery of one workshop attended by a minimum of 8 employers	SCG, CFDC, CoC, CMHA	✓		
Communicate with employers and business associations to market employment and training services.	Use EmployerOne survey feedback to collaboratively develop and deliver a minimum of one service to address employers’ needs.	SCG	✓		
Deliver work experiences in graduates’ field of study.	40 participants all within a designated group e.g. disabled, visible minority, etc. A minimum of 36 employed or returning to school.	EOTB, SC, JZ, GIAG, ODSP, OW, SLC	✓	✓	
Conduct “Community Connections” event connecting current and prospective immigrants with employers.	A minimum of five employers and 25 immigrants participate. A minimum of one employment opportunity results	LIP, Mun.	✓		
Develop and ensure updated “Welcome Guide for Immigrants” to SDG and PR	Welcome Guide launched, posted online.	LIP, Mun. JZ, ODSP, OW, SLC	✓	✓	✓
Deliver GEOFutures Career Decision-making program to grade and secondary school students and job searching youth.	10 educators trained as trainers. 500 youth participants. Evaluation of program completed.	OTF, EOTB, CSDCEO, UCDSB	✓		

Key Priority # 3 – Encouraging community planning that leverages talent and supports prosperity					
			Timeframe *		
Action	**Outcomes**	**Partners****	**S**	**M**	**L**
Organize and participate in one annual job fair in SDG and one annual job fair in PR. In SDG service providers will identify themselves collectively as Employment Ontario services.	A minimum of six companies participate annually in each job fair. A minimum of 250 jobseekers attend each job fair annually.	SCG, CoC, Mun., LCC, AAMB, MCA, ODSP, OW, CSEPR, CESOC, etc.	✓	✓	✓
Participate in a minimum of one job fair outside of SDG and PR each year.	A minimum of two individuals relocate to the region for employment.	Mun., CESOC, EOTB	✓	✓	✓
Chair Local Immigration Partnership Council. Conduct survey of immigrants to identify service gaps. Work with LIP members to address.	Lead and collaborate to complete LIP action plan. Survey a minimum of 15 immigrants.	LIP	✓		
Participate on various boards and committees as requested contributing expertise in workforce development. Provide local LMI as requested by economic developers, educators, media, etc.	Sit as a director on a minimum of one board. Participate on a minimum of five standing committees annually and three special project groups.	FAAC, CIC, EN, CoC, CRC, Mun., LCC, AAMB, MCA, ODSP, OW, CSEPR, CESOC, etc.	✓	✓	✓
Develop private and public sector funding proposals as required to address service needs and build business capacity.	A minimum of one proposal developed annually for a community partner.	EOTB, Mun. WDB, CCPS, etc.	✓	✓	✓

Key Priority # 4 – Gathering, analyzing and communicating meaningful labour market information					
			Timeframe *		
Action	**Outcomes**	**Partners****	**S**	**M**	**L**
Analyze customized census data to update www.labourmarketinfo.com website. Market website availability to business, business groups, service providers and educators.	Update a minimum of 200 occupations in SDG and PR and post to website in English and French. Update website annually with Canada Business Counts data.	EOTB, SCG, CoC, Mun., LCC, AAMB, ODSP, OW, CSEPR, etc.	✓	✓	✓
Collaborate with Eastern Region WDBs to create a regional EmployerOne survey. Distribute and promote to SDG and PR employers.	A minimum of 100 employers to complete survey.	EOTB, CIC, WDBs, CoC, SCG, CFDC, Mun.	✓		
Complete annual Local Labour Market Plan with updated LMI, EO service results analysis, consultation feedback and actions.	LLMP report produced and distributed	EOTB, SCG, Mun., CIC, AAMB, CoC, LLEO, OCCL, CSEPR, CFDC, etc.	✓	✓	✓

* S = Short-term (2018); M = Mid-Term (2019) L = Long-Term (2020)
** Acronym Glossary follows

ACRONYM GLOSSARY

AAMB – Akwesasne Area Management Board
CESOC - Conseil Économique et Social d'Ottawa Carleton
CIC – Cornwall Innovation Centre
CRC – Cornwall Refugee Council
CSDCEO - Conseil scolaire de district catholique de l'Est ontarien
CSEPR - Le Centre de services à l'emploi de Prescott-Russell
CFDC – Community Futures Development Corporation SDG
CoC – Chamber of Commerce
CCPS – Cornwall Community Police Services
EN – EmployAbility Network
EO – Employment Ontario
EOTB – Eastern Ontario Training Board
FAAC – Food and Agriculture Advisory Council
GIAG – Glengarry Inter-Agency Group
JZ – Job Zone d'emploi
LIP – Local Immigration Partnership, SDG and PR
LCC – La Cité Collegiale
MCA – Mohawk Council of Akwesasne
MJA – Moi J'Apprends
Mun. – Municipalities including economic development representatives
OCCL – Ottawa Community Coalition of Literacy Programs
ODSP – Ontario Disability Support Program
OTF – Ontario Trillium Foundation
OW – Ontario Works
SC – Service Canada
SCG – Service Coordination Group members (Carrefour Formation pour adultes, EOTB, GIAG, JZ, MJA, SLC, TCL, TRL
SDG – United Counties of Stormont, Dundas and Glengarry
SLC – St. Lawrence College
TCL – Tri-County Literacy
TRL – T.R. Leger, Upper Canada District School Board
WDB – Workforce Development Boards

APPENDIX ONE

Occupations employing the greatest number of people in Stormont, Dundas and Glengarry and Prescott Russell and the impact of automation

Occupation	No. in Occupa-tion*	Percent under age 35	Probability of auto-mation**	Proportion of tasks automated
6421 Retail Salesperson	3,945	48.2	92.0	47.0
6611 Cashiers	2,695	74.2	97.0	49.0
7511 Transport Truck Drivers	2,535	15.2	79.0	69.0
0621 Retail and Wholesale Trade Managers	2,485	18.7	20.5	28.0
1241 Administrative Assistants	2,370	20.7	96.0	54.0
0821 Managers in Agriculture	2,215	13.3	47.0	31.0
4032 Elementary/Kindergarten Teacher	2,205	30.2	0.4	14.0
6711 Food Counter Attendant/Kitchen Helper	2,145	70.9	91.5	78.0
3012 Registered Nurses	1,805	22.7	0.9	29.0
7611 Construction Trades Helpers/Labourers	1,750	44.0	88.0	35.0
6552 Customer & Info Service Reps	1,725	24.3	55.0	29.0
1411 General Office Support Workers	1,720	34.6	61.0	96.0
3413 Nurses Aides, Orderlies, Patient Assoc.	1,660	35.2	38.5	38.7
1221 Administrative Officers	1,590	21.1	96.0	54.0
7452 Materials Handlers	1,545	38.5	85.0	7.0
6733 Janitors, Caretakers, Building Super’ts	1,500	20.3	66.0	22.0
4031 Secondary School Teachers	1,480	35.1	0.8	15/-
8431 General Farm Workers	1,410	56.4	87.0	45.0
4214 Early Childhood Educators & Assistants	1,260	47.6	0.7	7.0
7321 Auto Service Tech/Truck/Bus Mechanic	1,245	43.5	59.0	91.0
6731 Light Duty Cleaners	1,215	32.9	69.0	18.0
7271 Carpenters	1,175	37.4	92.0	72.0
1431 Accounting and Related Clerks	1,140	15.8	98.0	86.0
6322 Cooks	1,140	50.0	83.0	81.0
6622 Store Shelf Stocker, Clerk, Order Fillers	1,120	65.2	64.0	85.0
4212 Social and Community Service Workers	1,020	48.5	1.2	13.0
8612 Landscape/Ground Mainten. Labourer	1,010	56.4	95.0	9.0

* National Household Survey 2011
** Probability of automation within the next 10 to 20 years

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