

Building a Superior Workforce: 2013-2014 LOCAL LABOUR MARKET PLAN



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EMPLOYMENT ONTARIO

North Superior Workforce Planning Board gratefully acknowledges the continued support of the Ministry of Training, Colleges and Universities.



VISION:

Our human resource pool will be strategically aligned, competitively positioned and progressively developed to meet future social and economic demands across Northwestern Ontario.

MISSION:

Connecting community partners to improve the quality of life in our communities through workforce development.

The North Superior Workforce Planning Board will:

- · Build a strategic workforce readiness plan
- Create a dynamic, responsive process to satisfy current needs and prepare people for emerging labour market opportunities within a global economy
- Leverage community alliances to maximize labour market capacity and competitiveness

MANDATE:

Leading in the creation of innovative labour market solutions by:

- · Providing authoritative and evidence-based research
- · Identifying employment trends
- · Targeting workforce opportunities
- · Initiating workforce development strategies

ABOUT THE NORTH SUPERIOR WORKFORCE PLANNING BOARD

The North Superior Workforce Planning Board (NSWPB) is one of twenty-five Workforce Planning zones across Ontario, mandated through the Ministry of Training, Colleges and Universities to identify, assess and prioritize the skills and knowledge needs of community, employers and individual participants/learners in the local labour market through a collaborative, local labour market planning process.

An active and broadly-based volunteer Board of Directors representing Business, Labour, Women, Francophones, Aboriginal People, Cultural Diversity, Persons with Disabilities and Educator/Trainers governs its affairs. First established in 1996, NSWPB is recognized by community, economic and municipal leaders as a "partner of choice" in the identification and implementation of local solutions to local labour market issues.





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EXECUTIVE SUMMARY 2013



The Workforce Planning Board has a history of assisting the area in understanding the constant demographic changes that we are facing. The research and analysis behind their publications has always been top notch and for that reason they are the go-to organization for anyone planning for the future of this region.

EXECUTIVE SUMMARY

Building a Superior Workforce: 2013-2014 Labour Market Action Plan outlines the most up-to-date employment statistics and identifies strategic actions completed during the 2012-2013 fiscal year and the proposed actions for this fiscal year, April 1, 2013 to March 31, 2014.

This Local Labour Market Plan continues to be a result of our labour market analysis combined with key informant intelligence gathered through:

- Engagement with key labour market partners and contacts involving interviews, meetings, and community consultations;
- Participation in numerous meetings, conferences, community events and collaborative strategic discussions with community partners;
- Feedback received from participants at NSWPB hosted events, community partners and organizations, various orders of governments and their representatives.

Thunder Bay District's employment landscape is unique and ever-changing in response to internal and external influences, shifts, and forces. The World Development Report, 2013 states, "In today's global economy, the world of work is rapidly evolving. Demographic shifts, technological progress, and the lasting effects of the international financial crisis are reshaping the employment landscape in countries around the world."

The regional employment landscape provides us with a myriad of possibilities and opportunities. Mining sector development and production continues to be of great interest and promise as we look toward our future. The Conference Board of Canada's report, The Future of Mining in Canada's North notes "in 2011, there were 11,155 Northern Ontario residents employed in the mining sector, which is more than half of all Canadian Northerners employed in mining. An additional 6,964 Northern Ontario residents will be employed in the mining sector by 2020 due to the growth forecast in metal mining output."

What does that translate to for the Thunder Bay District? NSWPB's "Custom Labour Market Report – Thunder Bay District Mining Industry" projects cumulative hiring requirements upwards to 4,150 workers in our region alone. As such, in response to this knowledge and through our community consultations, three of the six initiatives planned for 2013–2014 are directly related to the mining sector.

It is important to note that other sectors are showing equal promise and potential. It is encouraging to see a resurgence of activity and investment in the forestry sector as evidenced by plans released by Resolute Forest Products and the Aditya Birla Group out of Terrace Bay. To meet the growing demand

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AN ADDITIONAL 6,964
Will be employed in the mining sector by 2020

World Bank. 2012. World Development Report 2013 Overview: Jobs. Washington, D.C.: WorldBank. License:

The Future of Mining in Canada's North. Conference Board of Canada, January 2013 http://www.conferenceboard.ca/temp/a9aa769d-63df-444b-9d31-a0f0a2099a7a/13-201_futureofmining_cfn.pdf

of these mills, new sawmills are projected to open while old ones are looking at the feasibility of reopening their doors. The recent awarding of contracts to Bombardier has secured its position as one of Thunder Bay District's major employers and has contributed to an estimated gain of over 1,300 jobs in the Manufacturing sector over the last two years. In addition, we are anticipating an increased demand for transporting these materials which will bolster the hardhit industries of truck, transit and ground transportation.

Occupations within the Professional, Scientific and Technical Services industries once again weigh in as one of the top three Small and Medium Enterprises (SMEs) in employment and the top industry experiencing the greatest absolute growth within the Thunder Bay District in 2011-2012.

We are encouraged by the show of positive net-migration for the past three years in a row and are hopeful this trend will continue. People relocate for employment opportunities and, as mentioned, both Thunder Bay CMA and District are providing these new and exciting opportunities in a number of promising sectors. With projected growth there will be projected opportunities and employment. When studying the migration statistics over the past 10 years, there have been almost as many people who have migrated into the Thunder Bay CMA as have left, suggesting a demand for new skills and knowledge.

Looking at the population change in age groups for our District, there has been an increase of more than 700 persons over 50 years of age between 2006 and 2011. Combined with the aging baby boomer population, it certainly reflects and drives the increased need for health care professionals and programs and services within that sector. Projected Health Human Resources needs in the Districts of Thunder Bay, Rainy River, and Kenora were released in a study by NSWPB in March 2013. This report projects hiring requirements by occupations along with the associated costs for service provision by age and gender characteristics.

On the flipside of some of these sector challenges, there are very encouraging numbers when reviewing specifics of the labour force itself. Between 2011 and 2012, employment increased by 600 persons; the unemployment rate dropped by 1.5%, and the employment rate grew by 1.2%.

Thunder Bay CMA's median employment income has been above that of the Province of Ontario since 2006. Since 2009, the median income in Thunder Bay CMA has grown at a significantly faster rate than that of Ontario and this trend is expected to continue as the demand for high paying jobs in mining, forestry, and manufacturing sectors increase along with health care and knowledgebased professionals.

The "Building a Superior Workforce" annual labour market plan is an important tool for organizations and community stakeholders throughout the Thunder Bay District concerned with the labour market landscape. The labour market analysis and partnerships planned for 2013-2014 will continue to contribute towards the development of our region's workforce. If you are interested in working with North Superior Workforce Planning Board on a particular initiative for the future, please get in touch with us today. We look forward to hearing from you!

2012 - 2013ACTION PLAN INITIATIVES



Community organizations such as ours have found NSWPB to be an invaluable partner in our Strategic Plan for community growth.

Steve Demmings, Past CEO Thunder Bay CEDC





Held in partnership with Northwest Training & Adjustment Board and the Sioux Lookout Area Aboriginal Management Board, the one day event-held once in Dryden and once in Thunder Bay-saw Aboriginal peoples (First Nations, Métis, and Inuit) living in Northwestern Ontario come together to learn more about the apprenticeships and trades opportunities within sectors such as mining and forestry. Information was presented on academic requirements necessary for entering these fields and apprenticeship opportunities that were available to them. Representatives from industry, unions, colleges, and training institutions were present to speak with participants about their career goals and direct them toward opportunities that might help attain these goals. Information was disseminated through presentations, booths, literature and one-on-one conversations. The common message that was reinforced over and over from each speaker was the importance of completing secondary education - particularly Math and English. In total, over 330 representatives from area First Nations, Métis groups and off-reserve Aboriginal people benefited from this event.

A final report outlining the proceedings is available on our website: www.nswpb.ca.



This study was conducted in partnership with the Northwest Training & Adjustment Board, the Food Security Research Network (FSRN) and Lakehead University as a CSL (Community Service Learning) activity by the Natural Resources Economics Class under the supervision of Dr. Chander Shahi. Dr. Connie Nelson of FSRN and Dr. Shahi accompanied 15 students who traveled the 3 regions and interviewed food producers and distributors, compiling and analyzing data to ascertain the results. The project marked the first time NSWPB and NTAB were able to use research services provided through students at Lakehead University. The 3rd year students, under the guidance and supervision of their professor, carried out reputable findings that showed the significant impact of local food production on our workforce. It is expected that these findings will contribute to developing policy and curriculum favourable for agricultural growth throughout Thunder Bay District and Northwestern Ontario.

This study is available on our website: www.nswpb.ca.



III. NORTHWESTERN COMMUNITY CAPACITY COMMITTEE - PHASE II

Carried out in partnership with Northwest Ontario Development Network, NCCC is a collaboration of stakeholders engaged in an integrated and coordinated approach to human and community capacity building in Northern Ontario. As a Northwestern Ontario response, specifically to the substantial mining activity, NCCC was formed in order to prompt a great deal of focus and interest into the remote and rural communities located within proximity to the mining activity. It is believed that such interest will be from both private and public sectors concurrently and may result in these communities being bombarded by information and inundated with people and options. NCCC was formed to provide the communities and interested parties assistance through the sharing of its knowledge and understanding of programs, services and initiatives available to them to ensure unneeded and/or unwanted duplication of services does not occur.

An executive summary outlining the full details of this committee's work is available on our website: www.nswpb.ca.

IV. PAN-NORTHERN COLLEGE AND PLANNING ZONES GROUP

On February 16, 2012, North Superior Workforce Planning Board and Confederation College hosted a meeting with representatives from the northern colleges and planning zones as follows:

- North Superior Workforce Planning Board;
- Northwest Training & Adjustment Board;
- Far Northeast Training Board;
- The Labour Market Group;
- Sudbury & Manitoulin Workforce Partners Board;
- Algoma Workforce Investment Committee;
- Cambrian College.
- Sault College;
- Confederation College;
- Northern College;
- · Canadore College;
- · Collège Boréal;

In February 2012, NSWPB released its report entitled "Custom Labour Market Report: Thunder Bay District Mining Industry," revealing projected hiring requirements in the mining sector over the next 2, 5, and 10 year horizons. The other five Planning Boards in Northern Ontario expressed their interest and commitment to commission similar reports for their area. These reports were completed in March 2013.

Through the work of this partnership, a number of important Memorandums of Understanding have been signed by each of the northern colleges, outlining how they will work together to best meet the demands for training and education of the workforce to prepare them for employment in this burgeoning sector.

An executive summary outlining the full details of this partnership is available on our website: www.nswpb.ca.

V. HEALTH HUMAN RESOURCES STUDY

From the original "Building a Superior Workforce: 2009-2012 Labour Market Action Plan" a Health Human Resources study was proposed as a major project to be carried out by NSWPB in accordance with both labour market information and local intelligence. However, the resources, partnerships, and timeframe to conduct this important partnership did not present themselves until 2012-2013. As such, NSWPB has partnered with Employment Ontario, North West Local Health Integration Network, Northwest Training & Adjustment Board, and Réseau du mieux-être francophone du Nord de l'Ontario to conduct a comprehensive study outlining the major human resources needs within the health sector across Northwestern Ontario over the next 5-10 years. Crupi Consulting, a local firm out of Thunder Bay, was hired to carry out this project.

This study is available for download on our website: www.nswpb.ca

VI. THINK GLOBALLY, ACT LOCALLY COMMUNITY PRESENTATION

NSWPB, in partnership with Employment Ontario, Confederation College, Thunder Bay Community Economic Development Commission, and the Thunder Bay Chamber of Commerce presented "Think Globally, Act Locally" – an afternoon forum that featured a keynote address by Thomas Townsend, with the Organization for Economic Cooperation and Development. Townsend presented an overview of where our region has been economically and with our labour force, followed by a facilitated discussion toward developing a renewed sense of direction in growing our region's workforce and economy. This event has helped to empower our community partners in facing economic opportunities as a collective and with a plan of action to ensure success for our region.

The final report is available on our website: www.nswpb.ca.



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LABOUR MARKET **ANALYSIS**



I believe that the NSWPB provides the most current and accurate employment and economic statistics of anyone in Canada for our region.

Larry Hebert, Councillor at Large, City of Thunder Bay

BACKGROUND

In 2008, the Ministry of Training, Colleges and Universities mandated the 25 Workforce Planning Zones across Ontario to begin analyzing local labour markets using labour market indicators to highlight industry sectors and occupations where there appeared to be labour market opportunities or major challenges. This evidence both complements and adds to the existing sources of knowledge–including community consultations and local knowledge–that informs and directs the labour market planning process.

In the process of mobilizing data as evidence for local labour market planning, several indicators were chosen as a starting place for analysis, including: total employment and sector employment; employment in Small and Medium Enterprises (SMEs); total number of employers; industrial structure of employers; population dynamics; migration; occupational data, and educational attainment. Sources for data include Census data. Canadian Business Patterns. Labour Force Historical Review, and Tax Filer data. The 2013 labour market plan continues to use these sources - in so far as updated data is available. Much of the data from the 2011 Census is scheduled to be released in May, June, and August 2013 - most significantly that data pertaining to immigration, Aboriginal peoples, labour, education, and occupation - all integral indicators for a thorough labour market analysis of Thunder Bay District. Due to the release date of this plan, however, incorporating these findings into the overall labour market analysis will be shared in NSWPB's 2014-2015 labour market plan.

It is anticipated that this analysis will develop over time as the community's requirements evolve and as more information becomes available.

I. POPULATION AND MIGRATION

According to the 2011 Census, the overall population trend in Thunder Bay District continues to decrease, with each community showing loss between 2006 and 2011, and the District as a whole having decreased 2% while the province showed 5.7% growth in the same 5 year period.

Table 2 shows population in Thunder Bay District broken down into three general age groups. The District continues the common trend of greater net-loss in population, seeing 8,345 less people in 2011 than 2006. Of most significance, however, is the age group 50+, in which a net-gain of 755 individuals confirms existing knowledge that the District is aging. The median age in the District confirms this as well, having increased from 41.7 in 2006 to 43.8 in 2011, while Ontario went from 39.0 (not shown) to 40.4.

Table 1: Population Change 2006-2011 by Community & Area

	2006	2011	Difference	Percent Change
Greenstone	4,886	4,724	-162	-3.3%
Manitouwadge	2,300	2,105	-195	-8.5%
Marathon	3,863	3,353	-510	-13.2%
Nipigon	1,752	1,631	-121	-6.9%
Red Rock	1,063	942	-121	-11.4%
Schreiber	*	1,124	*	*
Terrace Bay	1,625	1,471	-154	-9.5%
Thunder Bay City	109,160	108,359	-801	-0.7%
Thunder Bay CMA	122,907	121,596	-1,311	-1.1%
Thunder Bay District	149,063	146,057	-3,006	-2.0%
Ontario	12,160,282	12,851,821	691,539	5.7%

Source: Statistics Canada Census, 2006, 2011 *2006 figures for Schreiber are incorrect and therefore not available

Table 2: Population Change by Age – Thunder Bay District

	2006	2011	Change	Ontario Change
Under 25 years	44,785	41,060	-3,725	56,140
25-49 years	51,220	45,845	-5,375	-4,250
50+ years	2,710	3,465	755	639,645
Median Age	41.7	43.8		40.4 (2011)

Source: 2011 Census, Statistics Canada



Tables 3 and 4 address migration within the Thunder Bay CMA³ Net-migration refers to the number of people who have moved in and out of a region and does not include births and deaths. Although the District as a whole is decreasing in population, there is a shift occurring in netmigration for Thunder Bay CMA. For the third straight year, Thunder Bay CMA has shown a net in-migration. Although stated with caution, the latest numbers added to this table may be indicative of a trend reversal. As the region begins to experience a gradual emergence in key sectors including mining, forestry, and health care, we can expect this trend to continue. Consider that in the 10 year period, almost the same number of people entered the Thunder Bay CMA as had left. This migration dynamic is most certainly driven by the region's shifting demands for skills. People who cannot find employment suited to their skill set end up leaving the area, while the demand for certain new skill sets is attracting new people to

Table 4 breaks down the net-migration according to age group. It suggests that the positive netmigration experienced in the Thunder Bay CMA is due in large part to those in the 0-17 and 18-24 age groups. Indeed, for the first time in several years, Thunder Bay CMA is experiencing a netinflux of youth into the city - good news not just for the workforce but educational institutions in the area as well. The highest migration movement occurs within the key working age group (25 to 44) and with the last two years showing a net in-migration, the area seems to be attracting skilled workers. However, with the low numbers of employed workers within the older age groupsincluding those 45 and older who experienced a net out-migration in 2010-there may emerge a void of skilled and experienced workers capable of transferring skills to the younger generations.

Table 3: Annual Migration Estimates - Thunder Bay CMA

	In-Migration	Out-Migration	Net-Migration
2001	4,005	4,341	-336
2002	4,624	4,048	576
2003	3,885	3,838	47
2004	3,764	4,192	-428
2005	3,564	4,311	-747
2006	3,920	4,331	-411
2007	3.957	3,975	-18
2008	3,582 3,490		92
2009	3,607	3,166	441
2010	3,352	3,123	229
Total	38,260	38,815	-555

Source: Statistics Canada, CANSIM, Table 111-0028

Table 4: Annual Migration Estimates Broken Down by Age

	•				, ,
Age Group	Migration movement	2008	2009	2010	Net totals
	In-migration	855	873	798	
0 to 17 years	Out-migration	794	707	689	
	Net-migration	61	166	109	336
18 to	In-migration	656	676	643	
24	Out-migration	602	528	540	
years	years Net-migration		148	103	305
25 to	In-migration	1,348	1,276	1,259	
44	Out-migration	1,386	1,226	1,167	
years	Net-migration	-38	50	92	104
45 to	In-migration	573	589	486	
64	Out-migration	552	512	555	
years	Net-migration	21	77	-69	29
65	In-migration	150	193	166	
years and	Out-migration	156	193	172	
over	Net-migration	-6	0	-6	-12

Source: Statistics Canada, CANSIM, Table 111-0028

^{3.} Annual migration is tracked from July 1 to June 30 and therefore the data for 2010 covers July 1, 2010 to June 30, 2011 time period.

II. EMPLOYMENT

The analysis of Thunder Bay District's labour market begins by looking at overall employment figures for the Thunder Bay CMA based on the latest Labour Force Survey estimates available.⁴ Figures 1-4 provide a visual presentation of the change in the labour market between 2008 and 2012 – with specific attention drawn to the changes between 2011 and 2012. Indeed, the most significant good news story for the District is the renewed strength of the labour force. Having endured a tumultuous recession, 2011–2012 saw a rebound in employment: the labour force increased by 600 persons (Figure 1); the unemployment rate dropped by 1.5% (Figure 2) while the employment rate grew by 1.2% (Figure 3).⁵

III. EMPLOYMENT INCOME

Figure 4 assesses the growing median employment income in Thunder Bay CMA between 2006 and 2010 (latest data available). Compared to Ontario, Thunder Bay's income has increased at a similar rate until the period between 2009 and 2010 when the median income increased \$970 compared to \$240 for the province. This faster rate of growth is likely to continue as high paying jobs continue to be in demand in the District, including greater demands for mining and forestry sector workers, health care professionals, and other knowledge-based professionals.

Figure 4: Median Employment Income in Thunder Bay CMA *



Figure 1: Labour Force in Thunder Bay CMA (x 1.000) *

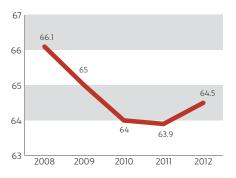


Figure 2: Unemployment Rate in Thunder Bay CMA (rate)

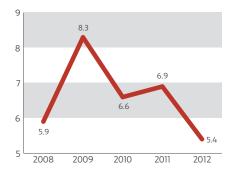
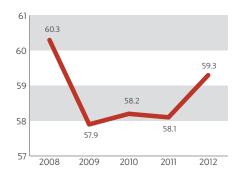


Figure 3: Employment Rate in Thunder Bay CMA (rate) *



^{*} Source: Labour Force Survey, Table 282-0110

^{4.} Thunder Bay CMA refers to Census Metropolitan Area. These figures can be extrapolated to refer to the overall district as the majority of the population dwells within the CMA. Population of Thunder Bay CMA in 2011: 121,596; population of Thunder Bay District: 146,057

^{5.} Labour force refers to the number of civilian, non-institutionalized persons 15 years of age and over who, during the reference week, were employed or unemployed. Unemployment rate is the number of unemployed persons expressed as a percentage of the labour force. The employment rate is the number of persons employed expressed as a percentage of the population 15 years of age and over. 6. Mining Creating New Jobs in Thunder Bay.

IV. SECTOR HIGHLIGHTS

Figures 6 through 9 provide a visual representation of key sectors experiencing growth and/or decline within the Thunder Bay CMA between 2008 and 2012 based on employment numbers.

Figure 6 confirms what is already known: As the population ages, an increased demand on health care and social assistance is soon to follow. Having said this, however, it is worth noting that other factors contribute to the increase in Health care and social assistance needs within the region as well. These factors are outlined in NSWPB's report on Health Human Resources needs throughout Northwestern Ontario (available here: www.nswpb.ca).

Figure 7 looks at Manufacturing's employment figures between 2008 and 2012. Between 2000 and 2008 (not shown), Manufacturing experienced a sharp decline, losing 2,300 workers in the sector. However, since 2010, there has been resurgence in the manufacturing sector, having gained 1,380 jobs between 2010 and 2012. This is, in large part, due to Bombardier Transportation's significant contracts for Toronto's Rocket subway and, as of May 2012, the manufacturing of 60 Go Train cars. With over 1,300 employees, Bombardier Transportation is a major employer in the Thunder Bay District, providing significant contribution to the region's workforce.

Figure 8 depicts the Transportation and Warehousing sector. As discussed earlier, the sector has shown slow but steady decline since 2005. Despite this, mining and forestry's growth projected over the next few years should see these numbers begin to increase.

Figure 9 shows the predictable growth and decline cycle of the Forestry and Mining sectors, with a slight trend toward decline overall. Since 2011, however, the District has experienced growth, due in large part to the Terrace Bay Mill opening under new management (AV Terrace Bay) with over \$250 million planned in retrofitting the mill to handle production of 280,000 tonnes per year of dissolving grade pulp. The conversion is slated to take place in 2016 and until then the mill will continue to sell and produce paper grade pulp. Additionally, Resolute Forest Products continues to show growth, announcing in January 2013 the construction of a sawmill in the Rainy River District scheduled for completion in 2014. With the demand for lumber continuing to grow due to an increase in U.S. housing starts, as well as the demand for wood from plants such as AV Terrace Bay, there is a very real sense of anticipation for forestry's return to the region. Mining has also no doubt contributed to the latest growth in the sector. According to John Mason, Project Manager of Mining Services with Thunder Bay CEDC, there are presently 25 mining exploration offices within the City of Thunder Bay with 12 new mining projects underway throughout Northwestern Ontario - 8 of which are advanced and will start production between 2013 and 2017.6

Figure 6: Health Care and Social Assistance Employment [62] (x1000 persons) *

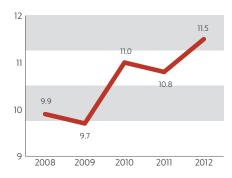


Figure 7: Manufacturing [31-33] (x1000 persons)*

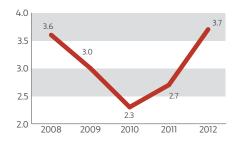


Figure 8: Transportation and Warehousing Employment [48-49] (x 1,000 persons) *

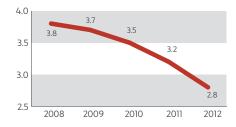
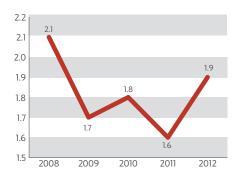


Figure 9: Forestry, Fishing, Mining, Quarrying, Oil and Gas [21 113-114 1153 2100] (x 1,000 persons) *



^{*} Source: Labour Force Survey, Table 282-0110

V. EMPLOYERS

Table 5 displays the change in total number of employers according to employee size range throughout the Thunder Bay District. Between 2011 and 2012, companies between 0-9 combined to show a loss of 99 businesses. With the continued expansion of "box" stores in the City of Thunder Bay-including two new Walmarts, a Toys R' Us, and a Target-all either having opened in 2012 or slated to open in 2013, the trend of losing small businesses (0-9) could continue. Despite this, all employee size ranges over 10 employees have shown growth in the last year. In fact, businesses with more than 10 employees combined to show an increase of 76 businesses within the District. Most noticeably is the 16% growth of those companies in the 100-199 employee size range, representing an increase of 8 employers.

Table 6 looks at selected industries within the Thunder Bay District that have shown either growth or loss of employers from 2011 to 2012. Of most significance is the almost 40% increase in support activities for Mining and Oil and Gas Extraction, reflecting an increase of 13 employers in the region. This bodes well for the region and the City of Thunder Bay, confirming the need for strategic positioning of resources, economic development, and preparation of our workforce through aligned education and training - as outlined by the soon to be released Thunder Bay Mining Readiness Strategy - An Integrated Regional Economic Development Plan, produced by Thunder Bay CEDC and Fort William First Nation as well as the findings from NSWPB's "Think Globally, Act Locally" presentation held in February 2013. Following the findings in Figure 8, Truck Transportation employers have decreased almost 10% during this time period. Again, however, with the continued growth and recovery of key primary industries, this sector should see renewed growth in the upcoming years.

Table 5: Change in Total Number of Employers by Employee Size Range

		Numb Thund		Percent Change Thunder Bay District	Percent Change Ontario		
Employee Size Range	2008 2009 2010 2011 2012			2011 -	2012		
0	3,197	3,132	3,081	3,147	3,130	-0.54	-1.75
1 - 4	2,163	2,152	2,117	2,053	2,034	-0.93	0.60
5 - 9	1,131	1,111	1,068	1,049	986	-6.01	-0.94
10 - 19	700	680	701	695	740	6.47	3.31
20 - 49	435	453	428	427	442	3.51	2.80
50 - 99	131	140	138	135	141	4.44	7.66
100 - 199	55	52	59	50	58	16.00	6.02
200 - 499	33	31	25	24	26	8.33	10.68
500+	15	14	11	13	13	0	2.40
Total	7,860	7,765	7,628	7,593	7,570	-0.30	-0.49

Source: Canadian Business Patterns, December 2008, June 2009, June 2010, June 2011, and June 2012

Table 6: Selected Industries Showing Significant Change in the Total Number of Employers Between 2011 and 2012 – Thunder Bay District

NAICS	June 2011	June 2012	Absolute Change	Percent Change
213 - Support Activities for Mining and Oil and Gas Extraction	33	46	13	39.39%
237 - Heavy and Civil Engineering Construction	95	101	6	6.32%
238 - Specialty Trade Contractors	446	459	13	2.91%
811 - Repair and Maintenance	242	253	11	4.55%
484 - Truck Transportation	243	219	-24	-9.88%
551 - Management of Companies and Enterprises	276	260	-16	-5.80%
523 - Securities, Commodity Contracts, and Other Financial Investment & Related Activities	309	295	-14	-4.53%
Total	7,593	7,570	-23	-0.30%

Source: Canadian Business Patterns, June 2011, June 2012

⁶ Mining Creating New Jobs in Thunder Bay. Thunder Bay Business. http://www.thunderbaybusiness.ca/article/miningcreating-many-jobs-in-thunder-bay-400.asp August 2012

VI. SMALL AND MEDIUM SIZED BUSINESSES

Small and medium sized businesses are those businesses with less than 99 employees. SMEs are divided according to the North American Industrial Classification System (NAICS). Examples of occupations within the NAICS listed in this section can be found in Section VII below. Because SMEs employ the majority of employees in the District, it is important to assess any increase or decline to determine the current direction of industry experienced by the region.

Table 7 provides the overall employment figures in SMEs between 2008 and 2012, comparing the Thunder Bay District to the province. The time frame accounts for the global recession, and suggests that the province has rebounded better than the District. Despite this, the District is in the process of restoring its SME base - for example, in the last year, 10-19 employee size range has increased by 45; 20-49 has increased by 15; and 50-99 has increased by 6 (See **Table 5** above). Signs of this stem from the growth of industries such as mining, in which, as mentioned

above, some 25 mining exploration offices have opened in the city alone, providing employment to over 130 persons. In addition to direct mining-related businesses are the indirect business developments and opportunities that service the mining sector from growing food and accommodation services to tire and transportation services. Additionally, medical research facilities continue their growing presence in the region with organizations such as Cancer Care Ontario recently being established and showing great promise for growth.

Table 8 provides the NAICS sectors with the highest increase in number of employees within small-tomedium enterprises (0-99 employees) over the last year throughout the District of Thunder Bay. Once again, Food Services and Drinking Places (7227), Specialty Trade Contractors (238), and Professional, Scientific and Technical Services (541) are at the top of this list. Despite both 722 and 541 decreasing in 2010-2011, all three sectors have shown a significant increase between 2011 and 2012.

Table 7: Total Employment in SMEs - Thunder Bay District

	Employment in 2008	Employment in 2011	Employment in 2012	Absolute Change 2008 - 2012	Percent Change
Thunder Bay District	46,327	45,310	44,211	-2,116	-4.57%
Ontario	893,331	885,714	888,980	-4,351	-0.49%

Source: Canadian Business Patterns

Table 8: Top 3 Employment in Small and Medium Enterprises (Excluding Public Sector) - Thunder Bay District

NAICS	2009	2010	2011	2012	Absolute Change 2009 - 2010	Percent Change 2009 - 2010	Absolute Change 2010 - 2011	Percent Change 2010 - 2011	Absolute Change 2011 - 2012	Percent Change 2011 - 2012
722 - Food Services and Drinking Places	5,033	4,750	4,673	4,750	-283	-5.62%	-77	-1.62%	77	1.65%
238 - Specialty Trade Contractors	2,540	2,559	2,564	2,696	19	0.75%	5	0.20%	132	5.15%
541 - Professional, Scientific and Technical Services	2,410	2,287	2,251	2,443	-123	-5.10%	-36	-1.57%	192	8.53%

Source: Canadian Business Patterns, June 2009, June 2010, June 2011, June 2012

^{7.} For a breakdown of occupations found within each 3 digit NAICS, refer to Section VI: Breakdown of Referenced NAICS

Most notably, both Specialty Trade Contractors and Professional, Scientific and Technical services showed dramatic increase from 2011 to 2012, showing absolute growth of over 300 employees combined. Such promising growth in these two sectors is indicative of the need for mutual emphasis on both skilled trade and knowledge-based initiatives.

Tables 9 and 10 look at those industries experiencing greatest absolute growth and loss in employment within SMEs throughout the Thunder Bay District. Not surprisingly, Professional, Scientific, and Technical Services continue to show expansion in the region, having gained almost 200 employees between 2011 and 2012. Accommodation services continue to grow – and are expected to only continue to do so in the years to come with news that four major hotels are currently either under construction or in the developing stages with plans for opening within the next two years.⁸

Industries experiencing the greatest loss over the 2011-2012 periods include Transportation and Hospitals. Transportation has experienced downsizing repeatedly over the last several years but with the sudden growth of mining and restart of forestry industries projected in the near future, transportation will more than likely rebound.

Table 9: Industries Experiencing Greatest Absolute Growth in Employment within SMEs – Thunder Bay District

Crown in Employment Within 50025 Thanker Bay Bistrice						
NAICS	2011	2012	Absolute Change	Percent Change		
541 - Professional, Scientific and Technical Services	2,251	2,443	192	8.52%		
721 - Accommodation Services	1,018	1,209	190	18.69%		
238 - Specialty Trade Contractors	2,564	2,696	132	5.15%		
442 - Furniture and Home Furnishings Stores	318	412	94	29.56%		
811 - Repair and Maintenance	904	989	85	9.46%		
914 - Aboriginal Public Administration	553	634	81	14.60%		

Source: Canadian Business Patterns, June 2011, June 2012

Table 10: Industries Experiencing Greatest Absolute Loss in Employment within SMEs – Thunder Bay District

NAICS	2011	2012	Absolute Change	Percent Change
484 - Truck Transportation	1,155	962	-193	-16.71%
622 - Hospitals	282	212	-71	-25.00%
485 - Transit and Ground Passenger Transportation	379	309	-70	-18.50%
813 - Religious, Grant-Making, Civic, and Professional and Similar Organizations	1,247	1,180	-67	-5.39%
611 - Educational Services	816	756	-59	-7.25
237 - Heavy and Civil Engineering Construction	599	558	-41	-6.90

Source: Canadian Business Patterns, June 2011, June 2012

For a breakdown of occupations found within each 3 digit NAICS, refer to Section VII: Breakdown of Referenced NAICS on page 20

VII. BREAKDOWN OF NAICS CODES REFERENCED

3 DIGIT NAICS CODE LEVEL	EXAMPLES OF OCCUPATIONS
213 - Support Activities for Mining and Oil and Gas Extraction	Support Activities for Mining and Oil and Gas Extraction; Oil and Gas Contract Drilling; Contract Drilling (except Oil and Gas); Services to Oil and Gas Extraction
237 - Heavy and Civil Engineering Construction	Water and Sewer Line and Related Structures Construction; Oil and Gas Pipeline and Related Structures Construction; Power and Communication Line and Related Structures Construction; Land subdivision; Highway, Street and Bridge Construction; Other Heavy and Civil Engineering Construction
238 - Specialty Trade Contractors	Poured Concrete Foundation and Structure Contractors; Structural Steel and Precast Concrete Contractors; Framing Contractors; Masonry Contractors; Glass and Glazing Contractors; Roofing Contractors; Electrical Contractors and Other Wiring Installation Contractors; Plumbing, Heating and Air-Conditioning Contractors; Drywall and Insulation Contractors Flooring Contractors; Painting and Wall Covering Contractors; Tile and Terrazzo Contractors; Site Preparation Contractors
442 - Furniture and Home Furnishings Stores	Furniture Stores; Floor Covering Stores; Window Treatment Stores; Print and Picture Frame Stores; All Other Home Furnishings Stores
484 - Truck Transportation	General Freight Trucking; Used Household and Office Goods Moving; Bulk Liquids Trucking; Forest Products Trucking; Specialized Freight (except Used Goods) Trucking
485 - Transit and Ground Passenger Transportation	Urban Transit Systems; Interurban and Rural Bus Transportation; Taxi Service; School and Employee Bus Transportation; Charter Bus Industry Other Transit and Ground Passenger Transportation
523 - Securities, Commodity Contracts, and Other Financial Investment and Related Activities	Securities and Commodity Exchanges; All Other Financial Investment Activities
551 - Management of Companies and Enterprises	This subsector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions. They may undertake the function of management, or they may entrust the function of financial management to portfolio managers.
541 - Professional, Scientific and Technical Services	Legal Services; Accounting, Tax Preparation, Bookkeeping and Payrol Services; Architectural, Engineering and Related Services; Engineering Services; Drafting Services; Geophysical Surveying and Mapping Services Specialized Design Services; Interior Design Services; Graphic Design Services; Computer Systems Design and Related Services; Management Consulting Services; Environmental Consulting Services; Other Scientific and Technical Consulting Services; Research and Development in the Physical, Engineering and Life Sciences; Research and Development in the Social Sciences and Humanities; Advertising, Public Relations, and Relatec Services; Marketing Research and Public Opinion Polling; Photographic Services; Translation and Interpretation Services; Veterinary Services
611 - Educational Services	Elementary and Secondary Schools; Community Colleges; Universities; Business and Secretarial Schools; Professional and Management Development Training; Technical and Trade Schools; Fine Arts Schools; Educational Support Services
622 - Hospitals	General Medical and Surgical Hospitals; Psychiatric and Substance Abuse Hospitals
721 - Accommodation Services	Hotels; Resorts; Housekeeping Cottages and Cabins; Hunting and Fishing Camps
722 - Food Services and Drinking Places	Full-Service Restaurants; Limited-Service Eating Places; Food Service Contractors; Caterers; Drinking Places
811 - Repair and Maintenance	Automotive Mechanical and Electrical Repair and Maintenance Automotive Body, Paint, Interior and Glass Repair; All Other Automotive Repair and Maintenance; Electronic and Precision Equipment Repair and Maintenance; Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance Reupholstery and Furniture Repair; Footwear and Leather Goods Repair
813 - Religious, Grant-Making, Civic, and Professional and Similar Organizations	Grant-Making and Giving Services; Social Advocacy Organizations

Source: North American Industry Classification System (NAICS) 2007

2013 - 2014ACTION PLAN INITIATIVES



Over the years, the Workforce Planning Board has proved over and over again that they are leaders in workforce planning and labour market information.

Bruce Hyer, MP Thunder Bay - Superior North

North Superior Workforce Planning Board's key initiatives for 2013-2014 will address workforce issues within the Thunder Bay District from a number of innovative approaches. Consultations within the region throughout the last year have prompted at least two region-specific projects, including a partnership with interested municipalities in producing 3-5 minute videos highlighting the specific workforce needs within their communities. These videos will serve as a tool for attracting skilled workers into the communities, assisting both the community and its major employers in hiring. Also, an exciting partnership with regional high schools is being planned to provide a venue for mining and forestry representatives to share with students and parents those career opportunities available in their own backyard.

In response to both the labour market data and the feedback received from community consultations, additional partnerships include a study to project trades occupations-and appropriate regional training-over the next five years; and a radio series to be broadcast throughout Northwestern Ontario, highlighting specific skills that local major employers are seeking.

The remaining partnerships for 2013-2014 involve the Mining sector and arrive in part through consultation with those in the sector as well as employment/training service providers. The first partnership consists of a time continuum of project requirements for each existing mining project in the region, informing employment service providers of the occupations needed at specific periods over the next few years within the sector. The final partnership will result in a tool - either print or web-based - that will highlight the various pathways to be taken to get into the mining sector. This will be a valuable resource both for those looking to find employment and those involved with employment counselling.

These six initiatives meet the requirements to the Ministry but are not exhaustive of the work being planned by NSWPB for 2013-2014. Along with participation in a number of community committees, additional projects above and beyond the required six include providing support to the employment and training service providers through a new website (www.employmentplus.ca) and holding a networking opportunity in which front line employment service providers will gather for professional development. In addition to this, NSWPB continues to offer labour market information presentations to interested community stakeholders, providing timely and relevant LMI upon request.

The following table provides a brief synopsis of the six key initiatives outlined above. For a detailed description, please visit our website and click on the "Workforce Planning Boards Projects Database" on the homepage (www.nswpb.ca).



ACTION	DESCRIPTION	OUTCOMES	OUTPUTS	TIMING
Place-based Trades Needs	This study will identify employers' needs for trades occupations over the next five (5) years in the District of Thunder Bay and will then target regional training for these trades accordingly through place-based training strategy.	Existing and up-and- coming workforce will be informed as to what local employers' forecasted skilled needs will be.	Completed study with clear details as to what the demand for specific skills pertaining to trades will entail A final report that will include an executive summary of the study and its approach, key findings and statistics identified throughout the process and will also include a chart outlining paths to apprenticeships.	Commence: April 2013 Completion: December 2013
Regional TV Showcase: Employer Specific Workforce Needs in the Region	Each of the communities in the District has a unique workforce story to tell and we will assist them to communicate it through this series. Each video will consist of clips of key informant interviews, as well as a narrated overview of the community, its employers and workforce needs and/or challenges.	Knowledge of the unique workforce needs within each community across Thunder Bay District communicated through local television and international audiences online	Video series highlighting each community's unique workforce needs	Commence: January 2013 Completion: December 2013
Mining Sector Hiring Requirements & Time Continuum	This partnership will provide a time continuum of current mining projects in the region and what the skill requirements are for each project utilizing hiring requirement projections from our Custom Labour Market Report for the Thunder Bay District.	Workforce training to be aligned with mining companies' hiring needs at each stage of the mining cycle	A visual depiction of individual project requirements by phase (advanced exploration, construction, operations) for each existing project Occupational summary for each phase for each project	Commence: June 2013 Completion: January 2014
Regional Youth in Mining	NSWPB will host an event in the region - similar to previous years' "Mission Employability" forums - that will be open to all high school students and will focus on the benefits of mining and forestry.	Encourage regional youth to choose careers in Apprenticeships and Mining	Presentation geared toward youth that will highlight mining HR needs in region An event that brings together industry, students, and parents to share knowledge on the opportunities available in the trades, specifically mining Final report outlining accomplished objectives	Commence: March 2013 Completion: November 2013
Radio Series: What Employers Are Looking For in the Workforce	This series of radio interviews will provide an opportunity for employers in identified sectors (Forestry, Manufacturing, Mining, and Service Sector) to report on and discuss skills and characteristics they are looking for to fill their employment needs.	General population better informed about the skills and training needed to find meaningful employment within identified sectors across Thunder Bay District	A series of radio interviews with key employers from identified sectors who can provide insight into the requirements they are looking for within their companies - both present and projected (to be posted on NSWPB website) A summary report of employers' findings to be accessed on our website	Commence: January 2014 Completion: March 2014
Pathways to Employment in Mining	A handbook/report/ web-based tool outlining the various pathways to employment within the mining sector	Clients of EO service providers will understand the correct path for them to find meaningful employment within the mining sector	An easily accessible and understandable tool for developing a career in the mining sector	Commence: April 2013 Completion: December 2013

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