Executive Summary

October 2013

The Durham Workforce Authority (DWA) provides leadership in labour market planning through the creation of the annual labour market plan. The 2013 plan released in March 2013, identifies existing and new program and service needs, informs and supports program and service decisions, and contributes to the setting of budget priorities and allocations. Our local economies require provincially supported, collaborative, locally-made and locally-focused interventions.

We continuously come across the community challenge of obtaining meaningful information for the labour market, and the availability of basic information gaps even at an aggregate level. To address these gaps, the DWA engaged in primary research – a first for the organization.

The DWA has produced an update to the March 2013 plan in light of new data made available through Statistics Canada and MTCU. Every five years, Canada carries out a national survey, the most recent being in 2011. In addition to the standard questions, a 20 per cent sample of census respondents has in the past been asked to complete a long-form questionnaire on questions beyond the basic demographics of age and residency. That long-form mandatory census was replaced by a voluntary survey in the 2011 census. The results of the 2011 National Household Survey form the basis of the following update regarding the local labour market.

Additionally, the Ontario Ministry of Training, Colleges and Universities provided its Workforce Planning Boards specially compiled data that has program statistics related to Apprenticeship, Employment Service, Literacy and Basic Skills and Second Career for the 2012-13 fiscal years.

This update to the March 2013 plan was created with the support of the DWA Board of Directors, a diverse group of sector representatives, youth, education, and business leaders. We thank our community partners who have provided frank feedback, ideals, and dreams of what Durham Region can achieve. Your support for this plan and the work of the DWA has been an inspiration as we strive to change, grow, and meet the needs of our community. Of course this report would not have been created without the dedication of the DWA staff; Paige Marlow, Esinam Agbeyaka, and Jennifer Kennedy.

Heather McMillan

Executive Director
Durham Workforce Authority

Methodology

The Labour Market Plan draws on Statistics Canada data and broad academic literature to present a conceptual and empirical profile of Durham Region's labour market.

A combination of methodologies inform this report including ongoing data analysis both on significant employment sectors, emerging and critical issues, collecting and analyzing information from stakeholders (including municipal, provincial governments, academic institutions, sector councils, industry groups, and associations, community agencies, and employers) direct feedback at consultations and events, and on line surveys.

This year, for the first time, MTCU has provided the Workforce Planning Boards with aggregated Employment Ontario (EO) program data, broken down by individual Local Board area, accompanied by regional and provincial comparators. It is intended that these data elements serve as the basis for evidence-based discussions about local service issues –gaps, overlaps and under-served populations - with EO service providers. The purpose of the data analysis and local employment service network discussions is to enable the service network to plan coordinated actions that address the issues.

The program information released and shared within this document are for the largest EO programs for which consistent and reliable information are available. This information is derived from data entered by EO service providers into the Employment Ontario Information System and has been extracted by the ministry's divisional information management unit. Apprenticeship data has been extracted from the Apprenticeship Application and rolled up by 25 Local Board areas.

Also, readers of this report need to be advised that the cycle for labour market planning has undergone changes in timing. The 2013 labour market report, being released in October, will be a transitional report focused on understanding and supporting clients using the Employment Ontario network and other community services.

National Household Survey – Labour Market Indicators

Introduction

Every five years, Canada carries out a national survey, the most recent being in 2011. In addition to the standard questions, a 20% sample of census respondents has in the past been asked to complete a long-form questionnaire on questions beyond the basic demographics of age and residency. That long-form mandatory census was replaced by a voluntary survey in the 2011 census. The results of the 2011 National Household Survey form the basis of the following update regarding the local labour market.

A note of caution

Regrettably, as a result of this change from a mandatory to a voluntary set of questions, one cannot be certain that the responses reflect a proper representation of the population. In particular, concerns have been raised about how well this data represents marginalized groups. Thus, when it comes to low income individuals or individuals from certain demographic categories (e.g. Aboriginal peoples), their participation may be under-represented. It would also mean that occupations or industries that these individuals are employed in might be under-represented.

The NHS labour market data that has been released by Statistics Canada relates to the employment characteristics of residents, that is, the industries and occupations in which they work. This is not the same as describing what jobs exist in a given locality, as people sometimes commute to neighbouring locales for work.

The data describing the labour market characteristics of residents at a provincial level does indeed pretty much describe what jobs are present in Ontario, as a relatively small percentage of Ontarians work in another province. But at a more local scale, describing what industries or occupations the residents of a municipality or district or region work in is not a substitute for data which focuses on the jobs present within a given locality.

With this caution in mind, the following analysis provides some relevant labour market characteristics of residents of Ontario generally, and of Durham Region, from the year 2011, and makes some comparisons to the 2006 Census findings.

Employment by Industry

One way to profile the labour market is look at in which industries residents are employed. The proportion of residents employed in a given industry provides a sense of scale for that industry's importance, and changes in the employment mix by industry suggest which industries are growing and which are shrinking.

Ontario. Table 1 profiles this information for Ontario. The second column provides the actual number of people employed in each of the industries in 2011.

The third and fourth columns show the percentage change in the number of employed individuals, from 2001 to 2006, and from 2006 to 2011. Despite an overall growth in the employment numbers, the rate of growth and of decline varies considerably by industry. And compared to 2001 to 2006, the period between 2006 and 2011 saw many more industries showing employment losses.

Table 1: Employment by Industry; Comparisons between 2001, 2006 and 2011; Ontario

	Number	% Change			% Distribution		
	2011	01-06	06-11		2001	2006	2011
ALL INDUSTRIES	6,297,000	7.9%	2.2%		100%	100%	100%
Agriculture, forestry, fishing, farming	95,220	-7.1%	-12.6%		2.1%	1.8%	1.5%
Mining and oil and gas extraction	28,190	21.9%	16.3%		0.3%	0.4%	0.4%
Utilities	55,215	8.3%	13.5%		0.8%	0.8%	0.9%
Construction	382,570	15.7%	5.6%		5.5%	5.9%	6.1%
Manufacturing	657,625	-8.3%	-23.0%		16.3%	13.9%	10.4%
Wholesale trade	291,215	10.1%	-1.4%		4.7%	4.8%	4.6%
Retail trade	701,300	6.5%	3.2%		11.2%	11.0%	11.1%
Transportation and warehousing	294,020	10.2%	-1.1%		4.7%	4.8%	4.7%
Information and cultural industries	169,540	0.7%	3.2%		2.9%	2.7%	2.7%
Finance and insurance	353,230	8.2%	15.0%		5.0%	5.0%	5.6%
Real estate and rental and leasing	128,355	16.1%	4.9%		1.8%	2.0%	2.0%
Professional, scientific, technical	486,775	10.3%	7.5%		7.2%	7.3%	7.7%
Management of companies	6,230	5.6%	-23.2%		0.1%	0.1%	0.1%
Administrative and support	277,785	21.2%	-3.2%		4.1%	4.7%	4.4%
Educational services	474,205	16.1%	13.8%		6.3%	6.8%	7.5%
Health care and social assistance	668,435	14.8%	12.6%		9.1%	9.6%	10.6%
Arts, entertainment and recreation	128,705	14.4%	-1.3%		2.0%	2.1%	2.0%
Accommodation and food services	377,605	8.3%	-1.1%		6.2%	6.2%	6.0%
Other services	279,405	10.8%	-3.5%		4.6%	4.7%	4.4%
Public administration	441,370	13.5%	30.2%		5.2%	5.5%	7.0%

Two industries registered a decline in employment over both periods. Manufacturing had major losses, especially between 2006 and 2011. The losses represented 77,695 jobs between 2001 and 2006, and 196,755 jobs between 2006 and 2011. Agriculture, Forestry, Fishing and Faming also posted large percentage decreases, but with a smaller employment base the losses were smaller (8,300 jobs lost between 2001 and 2006, and 13,710 between 2006 and 2011).

A number of industries saw strong increases over both five-year periods; among the larger employers: Construction; Finance & Insurance; Professional, Scientific & Technical Services; Educational Services; Health Care & Social Assistance; and Public Administration.

Several industries experienced small losses between 2006 and 2011, after posting gains between 2001 and 2006; among the larger employers: Wholesale Trade; Transportation & Warehousing; Administrative & Support, Waste Management & Remediation Services; Arts, Entertainment & Recreation; Accommodation & Food Services; and Other Services.

The last three columns show the percentage distribution of employed residents by industry in Ontario for each of 2001, 2006 and 2011. Many industries have maintained a relatively consistent share of the total employed labour force over this ten-year period. By far the biggest change has been the decline in the share of persons employed in the Manufacturing sector, dropping from 16.3% in 2001 to 13.9% in 2006, then to 10.4% in 2011, falling from the largest industry in 2001 and 2006 to third place in 2011.

Several industries have seen a steady increase over the past 10 years: Educational Services (from 6.3% share to 7.5%); Health Care and Social Assistance (from 9.1% to 10.6%); and Public Administration (from 5.2% to 7.0%). Meanwhile, Retail Trade, by maintaining the same share, now represents the largest proportion of employed persons in Ontario, followed by Health Care and Social Assistance.

Durham Region. Tables 2 provides the industry employment numbers for 2011, with comparisons to 2006, for the Durham Region. Given the high levels of commuting between regions in the Greater Toronto Area, it bears emphasizing again that this data represents in what industries Durham residents are employed, not the actual jobs that are present in Durham.

The downturn in Manufacturing was felt hard by Durham residents, with a loss of 9,705 jobs, 60% of them in auto and auto parts manufacturing. There were also spillovers in related industries: Administrative and Support includes employment services (temp agencies) which lost 545 jobs, some of which may have been related to business lost in the manufacturing sector: wholesale distributors in motor vehicles and parts also lost 285 jobs.

On the other hand, many larger industries increased their hiring of Durham residents by a significant degree:

- Health Care and Social Assistance, 5,380 jobs (+19.8%), all in health care, led by hospitals, nursing homes and offices of health care practitioners other than physicians and dentists;
- Public Administration, 4,690 jobs (30.0%), two-thirds in regional and local governments;
- Finance and Insurance, 3,400 jobs (+19.0%), half among banks and another 1000 in the insurance industry; and
- Educational Services, 3,105 jobs (+15.7%), 1,785 among elementary and secondary schools, and 1,185 among community colleges and universities.

As a result of these changes, Manufacturing has gone from being the top employer in 2006 of Durham residents to third place with 9.3% of employed residents. Retail Trade held its share steady at 11.7% and moved into the top spot. Health Care and Social Assistance grew to be the second largest employer.

Table 2: Employment by Industry; Comparisons between 2006 and 2011; Durham Region

	Number	% Change		% Distribution	
	2011	**06-11**		**2006**	**2011**
ALL INDUSTRIES	308,860	5.0%		100.0%	100.0%
Agriculture, forestry, fishing, farming	2,725	-5.1%		1.0%	0.9%
Mining and oil and gas extraction	445	3.5%		0.1%	0.1%
Utilities	8,765	20.4%		2.5%	2.8%
Construction	19,965	2.2%		6.6%	6.5%
Manufacturing	28,655	-25.3%		13.0%	9.3%
Wholesale trade	15,845	2.4%		5.3%	5.1%
Retail trade	36,060	4.7%		11.7%	11.7%
Transportation and warehousing	14,045	4.7%		4.6%	4.5%
Information and cultural industries	10,140	13.9%		3.0%	3.3%
Finance and insurance	21,335	19.0%		6.1%	6.9%
Real estate and rental and leasing	6,095	-0.3%		2.1%	2.0%
Professional, scientific, technical	20,745	9.0%		6.5%	6.7%
Management of companies	270	-23.9%		0.1%	0.1%
Administrative and support	13,880	-2.7%		4.8%	4.5%
Educational services	22,840	15.7%		6.7%	7.4%
Health care and social assistance	32,605	19.8%		9.3%	10.6%
Arts, entertainment and recreation	6,120	9.5%		1.9%	2.0%
Accommodation and food services	15,735	6.2%		5.0%	5.1%
Other services	12,290	-4.0%		4.4%	4.0%
Public administration	20,305	30.0%		5.3%	6.6%

Employment by Occupation

Between 2006 and 2011, the classification system for occupations has changed, and so a straight comparison between 2006 and 2011 is not easily done. Instead, a comparison of the distribution of occupations will be provided. Durham Region will be compared to the general Greater Toronto Area (Peel, Halton, Toronto, Durham and York) and to Ontario minus these GTA figures, because there are significant differences between these two geographies that warrant unpacking.

Table 3: Employment by Occupation; Durham residents, 2011

	Number in 2011	Distribution of occupations		
		Durham	GTA	Ont-GTA
ALL OCCUPATIONS	308,865	100.0%	100.0%	100.0%
Management occupations	39,735	12.9%	12.6%	11.2%
Business, finance, administration	56,120	18.2%	19.3%	15.3%
Natural and applied sciences	20,700	6.7%	8.6%	6.6%
Health occupations	17,725	5.7%	5.2%	6.8%
Education, law, social, government	37,605	12.2%	11.6%	12.7%
Art, culture, recreation and sport	8,045	2.6%	3.7%	2.4%
Sales and service occupations	68,635	22.2%	22.6%	22.9%
Trades, transport, equipment operators	42,005	13.6%	10.8%	14.6%
Natural resources, agriculture	4,250	1.4%	0.8%	2.2%
Manufacturing + utilities occupations	14,050	4.5%	4.8%	5.4%

For this table, GTA refers to Peel, Halton, Toronto, York and Durham.
Ont-GTA means figures for Ontario minus the GTA numbers.

Durham Region. The distribution of occupations among employed Durham residents falls somewhere between that of the GTA and the rest of Ontario minus the GTA: for certain occupations, it closely follows the GTA numbers, such as in Management Occupations or Business, Finance and Administrative Occupations. But in most other instances, its proportions are more similar to the rest of the province, such as: Trades, Transport and Equipment Operators and Related Occupations; Natural and Applied Sciences Occupations; and Occupations in Art, Culture, Recreation and Sport. In other cases it falls between the two: Occupations in Education, Law and Social, Community and Government Services; Health Occupations; and Natural Resources, Agriculture and Related Production Occupations.

The most prominent occupation category among Durham residents is Sales and Service Occupations, making up 22.2% of Peel residents' jobs, almost exactly equal to the share in the GTA and the rest of the province.

Educational attainment

Education is regularly cited as a necessary prerequisite to labour market success. Between 2006 and 2011, residents of Ontario, and of Durham, upped their game. Across all age categories, there was advancement in the levels of educational attainment (Table 4).

Among 15-24 year olds, there were fewer individuals with no certificate, and a larger proportion of youth with high school degrees and with university degrees, compared to 2006.

Among 25-44 year olds, there were fewer individuals with no certificate or with a high school diploma, and more residents with a college or university diploma or degree. However, there were also slightly fewer individuals with an apprenticeship or trade certificate.

Among 45 to 64 year olds, there were fewer individuals with no certificate and about the same with a high school diploma. Across this age group there were more residents with a college or university diploma or degree. Once again, there were also slightly fewer individuals with an apprenticeship or trade certificate.

The biggest gains in education, in Ontario and in Durham Region, were registered by the 25-44 year olds, the prime working-age population.

Table 4: Level of educational attainment, all residents, Durham and Ontario, 2006 and 2011

2006			2011	
Ontario	Durham		Ontario	Durham
		15 to 24 year olds		
40%	44%	No certificate, diploma or degree	35%	36%
39%	37%	High school certificate or equivalent	41%	41%
2%	2%	Apprenticeship certificate or equivalent	2%	2%
10%	11%	College certificate or diploma	10%	11%
9%	7%	University certificate, diploma or degree	12%	9%
		25 to 44 year olds		
10%	9%	No certificate, diploma or degree	8%	7%
24%	27%	High school certificate or equivalent	22%	24%
8%	9%	Apprenticeship certificate or equivalent	6%	7%
24%	31%	College certificate or diploma	25%	32%
35%	26%	University certificate, diploma or degree	39%	31%
		45 to 64 year olds		
18%	15%	No certificate, diploma or degree	14%	11%
26%	30%	High school certificate or equivalent	27%	30%
10%	11%	Apprenticeship certificate or equivalent	9%	9%
20%	24%	College certificate or diploma	22%	27%
26%	20%	University certificate, diploma or degree	28%	22%

CANADIAN BUSINESS PATTERNS – LABOUR MARKET INDICATORS

Table 5 provides the number of employers present in Durham Region in June 2013, and breaks down the figures by industry and by employee size ranges (each area is represented by a separate table). The highlighted cells identity the three industries with the largest number of firms for each employee size category column.

Durham Region. The broad generalizations that applied last year still hold; indeed, there has been very little change in the patterns associated with employers by industry and size:

- *Number of small firms*: Businesses are by far made up of small establishments. 58% of the firms in Durham Region have no employees,[1] and another 23% have 1-4 employees; this almost exactly matches the pattern for Ontario as a whole;
- *Highest number of firms by industry*: The second to last column provides the percentage distribution of all firms by industry. Professional, Scientific and Technical Services is the largest industry by number of employers, accounting for 15.8%, very close to the provincial average of 15.1%; Construction comes second with 14.5%, considerably higher than the provincial average of 11.2%. Retail Trade; Real Estate and Rental & Leasing; and Other Services round out the top five, which remain unchanged from last year;
- *Highest number of firms by size and industry*: The three largest industries by each employee size category have also been highlighted. These are not changed at all from last year, except for one cell: Health Care & Social Assistance reached the top three in the 5-9 employee category, displacing Other Services. The table demonstrates how the large number of firms in the smaller size categories drives the total numbers (for example, in Construction; Real Estate and Rental & Leasing; and Professional, Scientific & Technical Services). In the mid-size and large ranges, Manufacturing; Retail Trade; Health Care & Social Assistance; and Accommodation & Food Services come to the fore.

[1] This actually undercounts the number of self-employed individuals. The Statistics Canada's Canadian Business Patterns database does not include unincorporated businesses that are owner-operated (have no payroll employees) and that earn less than $30,000 in a given year.

TABLE 5: DURHAM NUMBER OF EMPLOYERS BY EMPLOYEE SIZE RANGE JUNE 2013										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYERS								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	555	165	44	18	15	4	3	804	3	14
21 Mining	11	8	3	7	2	0	0	31	0	19
22 Utilities	19	3	0	2	3	2	3	32	0	18
23 Construction	3060	1021	343	152	69	23	5	4673	15	**2**
31-33 Manufacturing	482	256	132	108	94	41	31	1144	4	12
41 Wholesale Trade	554	270	142	114	66	16	12	1174	4	11
44-45 Retail Trade	1258	787	541	380	176	73	65	3280	10	**3**
48-49 Transportation/Warehousing	1121	304	57	36	31	11	16	1576	5	8
51 Information and Cultural	261	96	19	9	14	5	3	407	1	16
52 Finance and Insurance	1010	298	88	57	100	4	3	1560	5	9
53 Real Estate	2538	384	77	43	13	5	1	3061	10	**4**
54 Professional Scientific Tech	3389	1398	167	57	48	10	5	5074	16	**1**
55 Management of Companies	817	80	16	11	9	4	4	941	3	13
56 Administrative Support	960	415	168	76	50	16	15	1700	5	7
61 Educational Services	202	76	32	21	20	6	5	362	1	17
62Health Care & Social Assist	558	719	305	223	79	25	24	1933	6	6
71 Arts, Entertainment & Rec	322	98	35	38	35	7	11	546	2	15
72 Accommodation & Food	324	264	227	224	163	73	18	1293	4	10
81 Other Services	1259	881	301	117	29	11	4	2602	8	**5**
91 Public Administration	4	0	0	0	3	3	8	18	0	20
TOTAL	18704	7523	2697	1693	1019	339	236	32211		
Percentage of all employers	58%	23%	8%	5%	3%	1%	1%	100%		
Cumulative percentage	58%	81%	90%	95%	98%	99%	100%			

ONTARIO percentage of all employers	57%	24%	8%	5%	4%	1%	1%

Source: Statistics Canada, Canadian Business Patterns

Change in the number of employers by size of firm

One indicator of local economic activity and employment trends is the number of employers, including the size of their firms, present in the local community. Table 6 provides the numbers of employers aggregated by several size categories for Durham Region:

"0"	Zero employees (in most instances, self-employed employers, or no employees
1-19	Small firms
20-99	Medium-sized firms
100+	Large firms

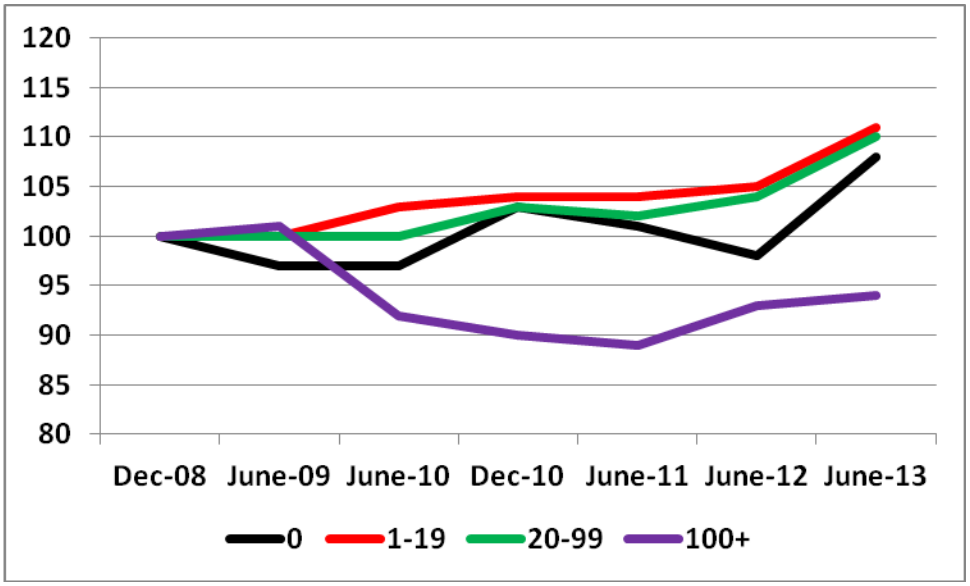
TABLE 6: DURHAM
NUMBER OF FIRMS BY EMPLOYEE SIZE
DECEMBER 2008 TO JUNE 2013

	0	1-19	20-99	100+
December 2008	17,289	10,775	1,231	251
June 2009	16,786	10,799	1,230	253
June 2010	16,809	11,147	1,228	231
December 2010	17,724	11,237	1,267	227
June 2011	17,528	11,178	1,253	223
June 2012	17,003	11,346	1,285	234
June 2013	18,704	11,913	1,358	236

Statistics Canada, *Canadian Business Patterns*

Chart xx makes evident the trends in the changing number of employers by employee size. The chart uses the figures for December 2008 as the baseline, assigning a value of 100. Each subsequent number is expressed in relation to the December 2008. This makes it easier to visualize changes across numbers with different orders of magnitude for these categories.

Chart xx: Change in the number of employers by size of firm, December 2008 to June 2013, Durham Region (December 2008 = 100)



There appear to be three distinct patterns in the change in the number of firms. Following the recession of 2008, there was a considerable decline in the number of firms with 100 or more employees. There has been a slight turn-around in the trend starting in 2012, but the number of firms with 100 or more employees has not returned to its 2008 figure.

The number of firms with no employees (typically self-employed, often consultants) seemed to change in the opposite direction from that of very large firms. With a small increase in the number of large firms in 2009, there was a slight decline in firms with no employees. As large firms declined, firms with no employees rose. Then as large firms recovered, the number of solo firms declined again. Only in 2013 were there increases in both, perhaps signalling some positive news.

For firms with 1-19 and 20-99 employees, there has been a steady increase in such establishments across this timeframe.

Change in the number of firms by industry, June 2012 to June 2013

Changes in the number of employers are experienced differently across the various industries. Table 7 highlights the change in the number of firms by industry and by employee size between June 2012 and June 2013 for Durham Region. The tables also list the total number of firms in each industry in June 2013, to provide a context.

The colour-coding of the table (green where there is an increase, red where there is a decrease) helps to illustrate any pattern. Note that these changes do not only represent the emergence of new firms or the shutting down of firms; an establishment can change categories, adding or losing sufficient workers to push them from one size category to another.

TABLE 7: DURHAM
CHANGE IN THE NUMBER OF EMPLOYERS,
BY INDUSTRY AND BY FIRM SIZE, JUNE 2012 TO JUNE 2013

INDUSTRY	Firm size (number of employees)					Total number of firms June-13
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing and farming	28	8	-1	0	35	804
Mining and oil and gas extraction	0	3	0	0	3	31
Utilities	5	-3	-1	0	1	32
Construction	244	70	2	-1	315	4673
Manufacturing	89	23	6	2	120	1144
Wholesale trade	-59	-10	3	1	-65	1174
Retail trade	175	86	6	0	267	3280
Transportation and warehousing	134	80	5	2	221	1576
Information and cultural industries	57	18	3	-2	76	407
Finance and insurance	76	37	0	1	114	1560
Real estate and rental and leasing	267	105	1	-2	371	3061
Professional, scientific and technical services	305	115	11	0	431	5074
Management of companies and enterprises	-16	-14	0	2	-28	941
Administrative and support	108	-4	10	0	114	1700
Educational services	14	-1	-1	-2	10	362
Health care and social assistance	130	113	1	-1	243	1933
Arts, entertainment and recreation	26	9	3	1	39	546
Accommodation and food services	19	57	33	2	111	1293
Other services	96	-122	-8	0	-34	2602
Public administration	3	-3	0	-1	-1	18
TOTAL	1701	567	73	2	2343	32211

Statistics Canada, Canadian Business Patterns, June 2012 and June 2013

Overall, the trends are quite positive, with growth occurring across industries and across firm sizes. That being said, some of the negative figures warrant a closer look.

Among Educational Services and Public Administration, there have been declines, including among establishements with more than 100 employees, without a corresponding increase in the 20-99 employee category (where an organization may lose a few staff, and slips from 102 to 98 employees).

Among Other Services there has been considerable decline. All the loss in the 1-19 employee size category comes from a decrease of 162 firms the “private household” subsector, which represents private households employing staff on their premises (such as gardeners, cooks and butlers). This appears as an unusual occurrence and could possibly involve a re-classification of certain activities or firms. The decrease in the 20-99 employee category is entirely due to fewer firms in the personal and laundry services subsector.

There were several other instances of losses in the 100+ employee category, given the otherwise strong, positive trends in the other size categories, namely: Information & Cultural Industries; Real Estate and Rental & Leasing; and Health Care & Social Assistance.

In terms of growth, some industries saw increases in all four size categories: Manufacturing; Transportation & Warehousing; Arts, Entertainment & Recreation; and Accommodation & Food Services. Two others experienced large growth in three of the categories: Retail Trade; and Professional, Scientific & Technical Services.

Employment Ontario Data

Background to the data

For the first time, Ontario’s Workforce Planning Boards were provided by the Ministry of Training, Colleges and Universities (MTCU) with specially compiled data that has program statistics related to Apprenticeship, Employment Service, Literacy and Basic Skills and Second Career for the 2012-13 fiscal years.

Background to the data analysis

The data released offered broad, demographic descriptions of the clients of these services and in a few instances some information about outcomes. The data provided to each Local Board consisted of three sets of data:

- Data at the Local Board level (in the case of the Durham Workforce Authority, the geography covers Durham Region);
- Data at the regional level (in this case, the Central Region, which consists of Peel, Halton, Toronto, Durham, York, Simcoe and Muskoka); and
- Data at the provincial level.

Raw numbers by themselves offer little insight. Data requires a context or a comparison for interpretation. The analysis which follows offers that context. In some cases, the comparison is simply between the data at the local board, regional and provincial levels. In other instances, these numbers are compared to other available data, such as labour market data from the National Household Survey (2011) or Labour Force Survey data.

The categories that follow are in the order of the data items that were prepared by MTCU. There are four program categories (Employment Service, Apprenticeship, Literacy and Basic Skills, and Second Career). The number of data sub-categories for each of these programs varies considerably.

EMPLOYMENT SERVICE

ES clients

Table 1: ES Clients, Number and Percent of all ES Clients; Compared to Total Population

	Board	Central	Ontario
ES CLIENTS			
Number	8,403	86,826	184,947
As % of Ontario	4.5%	46.9%	100%
TOTAL POPULATION			
Number	608,124	6,558,301	12,851,821
As % of Ontario	4.7%	51.0%	100%
TOTAL UNEMPLOYED			
Number	27,800	309,400	573,000
As % of Ontario	4.9%	54.0%	100%
ES CLIENTS AS A % OF ALL UNEMPLOYED			
	30%	28%	32%

Population figures from StatCan 2011 Census. Unemployed figures from Labour Force Survey, 2012; Central Region is based on sum of Peel, Halton, Toronto, Durham, York Census Division figures, and Barrie CMA. Board figures are based on Durham Census Division numbers.

The share of total ES clients served in the DWA area closely approximates its share of Ontario's population as well as of Ontario's unemployed population, far more so than is the case for the Central Region as a whole. In the case of the Central Region, the estimate of the number of unemployed actually undercounts the total number of unemployed, because Simcoe and Muskoka are only represented by Barrie CMA figures.

The comparison of ES Clients as a percentage of all unemployed is a rough calculation, as the ES client figures cover the fiscal year (April 1, 2012 to March 31, 2013) while the figure for the unemployed covers the calendar year (January 1 to December 31, 2012). Nevertheless, it provides a useful approximate comparison. It appears that the percentage of unemployed utilizing ES services (30%) is closer to the provincial average (32%) than the figure for the Central Region (28%).

Clients by Age Group

The following tables compare the proportions of ES clients by age range to the proportion of unemployed for the three geographies.

Table 2: Distribution by age of ES clients and unemployed, DWA, Central Region and Ontario

	ES CLIENTS			ALL UNEMPLOYED		
Age range	**Board**	**Region**	**Ontario**	**Board**	**Region**	**Ontario**
15-24 years	23.7%	18.6%	21.1%	43.2%	29.0%	31.7%
25-44 years	42.6%	50.0%	47.5%			37.0%
45-64 years	33.0%	30.6%	30.6%			29.4%
over 65 years	0.7%	0.8%	0.8%			1.8%

The figures for the unemployed in Ontario are from the Labour Force Survey for Ontario, 2012, StatCan CANSIM Table 282-0002; figures for the unemployed for the Region and the Board area are from StatCan Labour force estimate by age group, Canada, Province, CMA/CA/CD, 2012.
Region estimated unemployed figure is from data for Peel, Halton, Toronto, Durham, York and Barrie CMA.
Board estimate is from Durham Census Division data.

Comparing the Ontario figures first, one can see that youth are under-represented among ES clients, compared to their share of the unemployed population (21.1% compared to 31.7%). Similarly, adults aged 25-44 years are over-represented among ES clients, by almost exactly the same percentage points (47.5% compared to 37.0%). The 45-64 years and 65 years and over adult categories are almost equally represented among ES clients and the total unemployed population.

Focusing on the figures at the Region and Board levels, the only comparison that can be made is for the youth category, given the data that is available at the local level. However, this is probably sufficient, seeing as this is where the great variance takes place when comparing ES clients and the unemployed.

What is striking is the very high proportion of the unemployed population who are youth in Durham Region. Even though youth make up a slightly larger share of ES clients in the DWA area compared to the provincial average, it does not make up for their far greater share of the unemployed.

Gender

There are variations by geography in the gender split of ES clients, as well as differences when comparing that split to the gender split among the unemployed.

Table 3 provides the comparison of the gender split for both ES clients and all unemployed for Durham, the Central Region and all Ontario. The basic pattern is that while men make up a greater proportion of all unemployed (usually around 55%), they make up a somewhat smaller share of ES clients (around 48-50%), particularly at the Central Region level.

Table 3: Distribution by gender of unemployed and ES clients, Board, Region and Ontario

ONTARIO	
Unemployed	
55.2%	**44.8%**
ES Clients	
50.8%	**49.2%**
REGION	
Unemployed – Toronto CMA, Oshawa CMA, Barrie CMA	
54.9%	**45.1%**
ES Clients	
47.9%	**52.1%**
BOARD	
Unemployed – Oshawa CMA	
55.7%	**44.3%**
ES Clients	
49.5%	**50.5%**

The calculation for the unemployed in Ontario is derived from the Labour Force Survey for Ontario, 2012, StatCan CANSIM 282-0004. The calculation for the unemployed in the Central Region is an estimate derived from the Labour Force Survey for the Barrie, Oshawa and Toronto CMAs. The calculation for the unemployed in the Durham area is derived from the Labour Force Survey for the Oshawa CMA. ES client data is 2012-13. Unemployed data is 2012.

Designated Groups

The ES client data collects information on designated groups, namely: newcomers, visible minorities, persons with disabilities, and members of Aboriginal groups. This information is self-reported.

Table 4 provides the data for the Board, Region and Ontario levels, and calculates the percentage of each group, based on the total number of clients. It is not evident how many individuals declined to answer this question, and so to analyze these figures requires an appropriate comparison.

Table 4: Distribution of designated groups among ES clients, Board, Region and Ontario

Designated group	NUMBER			PERCENTAGE		
	Board	Region	Ontario	Board	Region	Ontario
Newcomer	306	11,393	15,918	3.6%	13.1%	8.6%
Visible minority	904	13,220	17,833	10.8%	15.2%	9.6%
Person w/disability	458	2,875	7,906	5.4%	3.3%	4.3%
Aboriginal group	56	817	4,536	0.7%	0.9%	2.5%

To provide that context, one can compare these numbers to the National Household Survey. While the survey reflects 2011 data, there is no reason to believe that the actual proportions of different designated groups and their labour market outcomes would have changed all that much. The Survey proportions can provide a useful point of reference (there is, however, no labour market outcome data for persons with disabilities).

Table 5: Comparison of share of designated groups among 21012 ES clients and unemployed in 2011 (National Household Survey), Board, Region and Ontario

Designated group	ES CLIENTS			UNEMPLOYED in 2011		
	Board	Region	Ontario	Board	Region	Ontario
Newcomer	3.6%	13.1%	8.6%	1.9%	10.2%	6.7%
Visible minority	10.8%	15.2%	9.6%	13.4%	49.4%	31.5%
Aboriginal group	0.7%	0.9%	2.5%	2.5%	1.2%	3.4%

Unemployed data for newcomers and visible minorities is from National Household Survey Cat. No. 99-012-X2011038, and for Aboriginal peoples from National Household Survey Cat. No. 99-012-X2011039.
Central Region data represents Oshawa, Toronto, Barrie, Collingwood, Orillia and Midland CMAs.
Board data represents Collingwood, Barrie, Orillia and Midland CMA figures.

From Table 5, it would appear that at the Central Region level, newcomers use ES services is slightly greater proportions than their share of the unemployed, while Aboriginal people are almost equally represented among ES clients and the unemployed. The figure for visible minorities is so disproportionate (only 15.2% of ES clients while 49.4% of unemployed) that one has to conclude that this ES client data does not reflect the true profile of the client population.

Internationally trained professionals

The ES data indicates how many ES clients served are classified as Internationally Trained Professionals. This includes not only newcomers but all immigrants who have education or training in a profession overseas. Table 6 below offers a comparison between Durham and the other four boards in the Central Region, as well as with the Ontario numbers.

Table 6: Number and percentage of Internationally Trained Professionals among ES clients, Central Region boards

	DURHAM	PEEL-HALTON	TORONTO	YORK	SIMCOE-MUSKOKA	ONTARIO
Number of ITPs	819	6,811	14,464	3,066	326	35,239
ITPs as % of all ES clients	9.7%	37.8%	33.9%	23.3%	5.6%	19.1%

Just as the Durham ES agencies serve a relatively smaller proportion of newcomers, so is it the case with ITPs as well.

Educational attainment

The ES data profiles the ES clients by educational attainment levels at intake. Table 7 compares the distribution of educational attainment levels among ES clients at the provincial level with two data sets, the Labour Force Survey statistics for 2012 and the National Household Survey data for 2011. There is not a complete match-up in terms of all the categories, but it is close enough for the sake of comparison.

Table 7: Comparison of educational attainment levels, ES clients (2011-2012), LFS (2012), NHS (2011), Ontario

ES clients 2011-12			LFS unemployed 2012			NHS unemployed 2011	
< Grade 8	1.2%	13.4%	0-8 years	2.2%	20.4%	No certificate	17.9%
< Grade 12	12.2%		Some high school	18.2%			
Secondary completion	29.6%		High school graduate	23.2%		High school	34.7%

Other	7.2%	Some post-secondary	9.3%	Below Bachelor	3.8%
College completion	27.1%	Postsecondary diploma	25.5%	College	24.0%
University completion	22.6%	University degree	21.5%	University	19.6%

Comparing the ES client numbers to the Labour Force Survey data, it would appear that unemployed individuals with less than a high school diploma are less likely to use ES services (they make up 20.4% of the unemployed while only 13.4% of ES clients), while high school graduates are more likely to use the services (23.2% of unemployed yet 29.6% of ES clients). Individuals with either college diplomas or university degrees are slightly more likely to use ES services.

The NHS data is presented in order to illustrate that it roughly matches the LFS profile, particularly with respect to individuals with less than a high school diploma, or with a college diploma or university degree. The major discrepancy occurs when comparing the figure for those with a high school diploma. With that variance in mind, we will use the NHS data to compare the educational attainment figures for the Board and Region level, as we do not have LFS data for educational attainment levels at that geography.

As Table 8 shows, there is a notable difference between the educational attainment levels for the unemployed in the Central Region versus that for the Board area (represented here by Oshawa CMA figures), in particular in terms of the much lower proportion of university graduates among the unemployed in the Durham Workforce Authority area (10.1% in the DWA area, 24.8% in the Central Region). These number no doubts undercounts the actual proportion, given that it does not include the communities of Pickering and Ajax. But it is noteworthy that this lower figure for university grads is also reflected in the ES client numbers, where only 14.4% of ES clients have a university degree, compared to 32.9% among ES clients in the Central Region.

That being said, ES clients with a post-secondary degree (college or university) still make up a slightly higher share of all ES clients compared to their share of the unemployed.

Conversely, those with less than a Grade 12 education represent 12.1% of ES clients, significantly less than their 18.8% share of all unemployed in the Oshawa CMA.

Table 8: Comparison of educational attainment levels among 21012 ES clients and unemployed in 2011 (National Household Survey), Board, Region and Ontario

EDUCATION LEVEL	ES CLIENTS			UNEMPLOYED in 2011		
	Board	Region	Ontario	Board	Region	Ontario

No certificate	12.1%	9.0%	13.4%	18.8%	15.1%	17.9%
High school	34.2%	24.8%	29.6%	38.8%	33.5%	34.7%
"Other"	8.4%	7.2%	7.2%	2.9%	5.0%	3.8%
College	32.0%	26.1%	27.1%	29.4%	21.6%	24.0%
University	13.4%	32.9%	22.6%	10.1%	24.8%	19.6%

"Other" under Unemployed in 2011 refers to those with a university diploma less than a Bachelor's degree.
Central Region unemployed data represents Oshawa, Toronto, Barrie, Collingwood, Orillia and Midland CMAs.
Board unemployed data represents Oshawa CMA figures.

Source of income

The ES data provides the source of data of clients at the time of intake. Table 9 compares the Durham area's results with those for the Central Region and Ontario.

Table 9: Percentage distribution of source of income of ES clients, Board, Region and Ontario

	Board	Region	Ontario
Employment Insurance	25%	20%	23%
Ontario Works	8%	10%	13%
Ontario Disability Support Program	2%	1%	2%
No Source of Income	43%	45%	38%
Other	23%	24%	24%

The Durham area has a higher proportion of ES clients who indicate that they have no other source of income. At the same time, it also has a much lower proportion of its clients who are recipients of Ontario Works.

Length of time out of employment/training

The ES data identifies how long a client was out of employment or out of training at the time of intake. Table 10 compares this data for ES clients at the Board, Region and Ontario level with the length of time of all unemployed individuals in Ontario for 2012.

Table 10: Percentage distribution by length of time out of employment/training of ES clients, Board, Region and Ontario, and unemployed individuals, Ontario, 2012

	ES CLIENTS 2012-13	ONTARIO

	Board	Region	Ontario	
Less than 3 months	42%	41%	44%	60%
3 – 6 months	17%	17%	17%	17%
6 – 12 months	15%	16%	15%	15%
More than 12 months	26%	26%	24%	8%

By and large, the distribution of ES clients by length of time out of employment or training is much the same between the Board, Region and the province. There are, however, two significant differences between these ES figures and the distribution of the unemployed in Ontario:

- ES clients represent significantly fewer people who have been out of employment for less than three months; and
- ES clients represent significantly more people who have been out of employment for more than 12 months.

Outcomes at Exit

The ES data indicates the outcomes at exit for clients. The following table compares the proportions in terms of these outcomes, between the Durham area, the Central Region and Ontario. The split in terms of outcomes is virtually identical across all three areas.

Table 11: ES client outcomes at exit, Board, Region and Ontario

	BOARD	REGION	ONTARIO
Employed	64%	64%	63%
Training	15%	14%	15%
No outcome	21%	22%	22%

Employment and training outcomes

The ES data provides further details on employment and/or training outcomes. Table 12 compares the distribution of outcomes by category for the Board, Region and provincial levels.

Table 12: ES client employment and training outcomes, Board, Region and Ontario

	BOARD	REGION	ONTARIO
Employed Full Time	54%	61%	58%
Employed Part Time	19%	16%	17%
Self-employed	3%	3%	3%
Both employed and in education	1%	1%	1%

Both employed and in training	1%	1%	1%
Employed apprentice	1%	1%	1%
Employed in area of training/choice	15%	11%	13%
Employed in a more suitable job	2%	3%	3%
Employed in a prof occupation/trade	4%	3%	3%

As in the case of the exit outcomes, the detailed results for employment and training outcomes show a high degree of similarity between the Board, Region and Ontario figures. The Durham area has slightly lower figures for Employed Full-time, and slightly higher figures for Employed Part-time and "employed in area of training/choice."

Training and education outcomes

As with the previous tables comparing employment and training outcomes, the outcomes relating to training and education have a general consistency across the categories, with a few variations. A few general observations: Second Career makes up about a third of the training and education outcomes, while apprenticeship and EO literacy training makes up only 1%. It should be emphasized that this is as a percentage of only employment and training outcomes. As a percentage of all ES clients, these figures are significantly smaller – in the case of apprenticeship and EO literacy training, around 0.1% of ES clients end up in either of these activities.

Table 13: ES client training and education outcomes, Board, Region and Ontario

	BOARD	REGION	ONTARIO
OSSD or equivalent	3%	3%	5%
Postsecondary	16%	15%	14%
Academic upgrading	5%	5%	5%
Other education	4%	7%	6%
Second Career	28%	30%	33%
EO training initiatives	18%	13%	15%
EO literacy training	1%	1%	1%
ESL/FSL	1%	5%	4%
MCI Bridge Programs	0%	1%	1%
Federal	17%	6%	7%
Apprenticeship	1%	1%	1%
Other skills training	7%	14%	10%

As far as the Durham area goes, "Federal" activities stand out as making up a much higher proportion of these outcomes. "EO training initiatives" are slightly higher, while "Other training initiatives" are comparatively lower. Second Career also is marginally lower.

Employment outcomes by industry

The Employed Outcome Industry data shows in what industry individuals finding employment got jobs. This analysis uses three comparisons to help understand these figures: one is job vacancy by industry, the second is total labour demand (which includes those employed in that industry plus the job vacancies in that industry), and the third is unemployed residents. The first highlights where the job openings are, the second shows the distribution of jobs (and vacancies) by industry, and the third shows who is looking for work.

The job vacancy numbers are obtained through questions added to StatCan's Business Payrolls Survey. Because this is a sample survey, the data becomes less reliable when broken down into sub-categories. For the sake of comparison and to obtain the most robust numbers, the annual job vacancy and labour demand figures were used. These cover the period January 1 to December 31, 2012. Reliance on monthly figures would have allowed for a precise time period match to the MTCU data (which covers April 1, 2012 to March 31, 2013), however it would have resulted in fewer industries to compare (three instead of nine), because the monthly data does not allow for reliable data for many industries.
The table below compares the percentages by industry for all of Ontario for the following categories (the industries for which data is reliable make up slightly more than 60% of employment and of job vacancies):

- MTCU EO Employed Outcome by Industry
- StatCan Job Vacancy by Industry
- StatCan Labour Demand by Industry (include both jobs AND vacancies)

Table 14: Ontario Data: MTCU EO Employed Outcome (2012-13); StatCan Job Vacancy (2012); and StatCan Labour Demand (2012)

	EO Employed Outcome	Job Vacancy	Labour Demand
Manufacturing	11%	8%	12%
Wholesale trade	2%	5%	6%
Retail trade	16%	12%	12%
Transportation and warehousing	5%	6%	5%
Finance and insurance	2%	6%	6%
Administrative and support	12%	8%	6%

Health care and social assistance	9%	15%	11%
Arts, entertainment & recreation	3%	2%	2%
Public administration	2%	3%	3%

In a number of industries, there is a fair degree of equivalence in the proportion of the total which that industry represents across all three data sets. This includes Transportation and Warehousing; Arts, Entertainment & Recreation; and Public Administration.

However, in six large industries, there are noticeable variations:

- In Manufacturing, the proportion of Employed Outcomes matches the Labour Demand, but it is quite larger than the Job Vacancy proportion;
- In Retail Trade, the proportion of Employed Outcomes is considerably larger than the proportion for Job Vacancy or Labour Demand;
- In Wholesale Trade as well as in Finance and Insurance, the proportion of Employed Outcomes is considerably smaller than the proportion for Job Vacancy or Labour Demand;
- In Administrative and Support (which includes employment in temp agencies), the proportion of Employed Outcomes is considerably larger than the proportion for Job Vacancy, and very considerably larger than the proportion for Labour Demand;
- In Health Care and Social Assistance, the proportion of Employed Outcomes is considerably smaller than the proportion for Job Vacancy, and slightly smaller than the proportion for Labour Demand.

The third comparison (Table 15) looks at the distribution of EO Employed Outcomes by industry for the Durham area, the Central Region area (Peel, Halton, Toronto, Durham, York, Simcoe and Muskoka) and Ontario and compares it to the distribution of employed residents for these areas (figures derived from the 2011 National Household Survey), as well as to the distribution of unemployed residents by the industry they are associated with (figures only available at the Ontario level).

Several observations about the data:

- The Retail Trade; Management & Administrative Support; Other Services; and Accommodation & Food categories account for a notably higher proportion of EO employed outcomes than their share of local employed residents or those unemployed at the provincial level;
- Wholesale Trade; Finance & Insurance; Professional, Scientific & Technical Services; Educational Services; and Public Administration account for a considerably lower share of EO employed outcomes than their share of local employed residents or those unemployed at the provincial level.

Table 15: Comparison by industry of distribution of EO Employed Outcomes to employed residents, Board, Region and Ontario, and unemployed residents by industry for Ontario

	BOARD		REGION		ONTARIO		
	EO employed outcomes	Employed residents	EO employed outcomes	Employed residents	EO employed outcomes	Employed residents	Unemployed residents
Agriculture, forestry, fishing, mining	0.2%	1.0%	0.4%	0.6%	2.1%	2.0%	2.5%
Utilities	0.4%	2.8%	0.3%	0.8%	0.3%	0.9%	0.5%
Construction	6.5%	6.5%	5.2%	5.7%	7.2%	6.1%	10.1%
Manufacturing	10.5%	9.3%	9.9%	10.0%	11.1%	10.4%	12.3%
Wholesale trade	1.9%	5.1%	2.3%	5.6%	2.1%	4.6%	3.2%
Retail trade	15.4%	11.7%	15.8%	10.9%	15.5%	11.1%	12.6%
Transportation and warehousing	3.6%	4.5%	4.2%	5.0%	4.5%	4.7%	4.1%
Finance and insurance	1.4%	6.9%	2.6%	2.6%	1.8%	5.6%	3.1%
Real estate and leasing	1.4%	2.0%	1.5%	1.5%	1.3%	2.0%	1.4%
Professional, scientific and technical	3.9%	6.7%	6.8%	6.5%	5.0%	7.7%	6.1%
Management, administrative support	13.7%	4.6%	13.4%	4.8%	12.1%	4.5%	9.6%
Educational services	4.1%	7.4%	4.5%	7.1%	3.8%	7.5%	6.8%
Health care and social assistance	10.0%	10.6%	10.0%	9.3%	9.2%	10.6%	4.2%
Information, culture and recreation	5.6%	5.3%	5.0%	5.6%	4.3%	4.7%	6.3%
Accommodation and food services	12.0%	5.1%	9.9%	5.7%	11.6%	6.0%	10.0%
Other services	8.1%	4.0%	6.7%	4.4%	6.4%	4.4%	3.9%
Public administration	1.2%	6.6%	1.5%	4.9%	1.9%	7.0%	3.3%

Notes:

- *Agriculture, forestry, fishing, mining* combines two industry sectors: *Agriculture, forestry, fishing and hunting* and *Mining, quarrying, and oil and gas extraction*
- *Management, administrative support* combines two industry sectors: *Management of companies and enterprises* and *Administrative and support, waste management and remediation services*
- *Information, culture and recreation* combines two industries: *Information and cultural industries* and *Arts, entertainment and recreation*
- The major industry employment categories under *Management, administrative support* are: *Services to buildings and dwellings* (cleaning, landscaping); *Business support services* (call centres, copy shops); and *Employment services* (temp agencies)

ES Recommendations

ES Data

The ES data on its own is not sufficient to determine service gaps or overlaps. Future meetings of the Employment Ontario Service Providers Team need to focus more toward the discussion of service overlap and the priority of service integration.

Moreover, the MTCU provided data is was received as a flat PDF and to conduct research and create real recommendations, the data should be provided in a format that allows it to be manipulated and analyzed.

Interventions for Vulnerable Populations

Comparing the ES client numbers to the Labour Force Survey data, it would appear that unemployed individuals with less than a high school diploma are less likely to use ES services (they make up 20.4% of the unemployed while only 13.4% of ES clients), while high school graduates are more likely to use the services (23.2% of unemployed yet 29.6% of ES clients). Individuals with either college diplomas or university degrees are slightly more likely to use ES services.

This indicates that additional work needs to be done to outreach to individuals without a high school diploma and that consideration needs to be given to creation of specialized programs that would meet the needs of this target group. More research should be done in partnership with the Literacy Network of Durham to determine literacy interventions to assist those without high school diplomas. Considering that ES managers highlighted a trend toward providing additional service and referrals outside of traditional Employment Ontario supports; that consideration may need to include service coordination with other community agencies and that Durham Region should re-visit 'Wrap Around' programing that is customized to precarious clients currently in the system or those who desire service but have difficulty accessing service.

Youth

The DWA discovered in early summer that Durham had the dubious distinction of the highest youth unemployment rate in the country. A community consultation was held in July with broad participation from community partners from service providers, police, innovation centres and youth serving organizations. The ES data indicates that youth make up a slightly larger share of ES clients in the DWA area compared to the provincial average, it does not make up for their far greater share of the unemployed. The ES data demonstrates that youth are under-represented among ES clients, compared to their share of the unemployed population (21.1% compared to 31.7%).

As a result of the consultation and in response to the data, the DWA is currently conducting a youth survey; a report will be released in late October 20123.

During a recent consultation, ES managers felt that government should prioritize and invest in programs that support youth, aligning post-secondary education to the labour market and additional localized labour market information. It is very encouraging that the province has released $295 million in specialized program funding for youth. This funding and its resulting local interventions will help youth enter the labour market.

Training and Programs

ES mangers noted some emerging training needs in Durham:

- Skilled Trades – journey people
- Accounting
- Bilingual
- Fast order cooks – but are concern the rate of pay is too low
- Customer Service for certain retail outlets & restaurants (customer training obvious with upselling – likely commission environment)
- How to hold on to a job and manage expectation

Essential Communications, the organization responsible for the Ontario Self Employment Benefit Program (OSEB) in Durham Region, reported the following self-employment training, trends within the following categories: Home renovation, social media marketing, home health care, catering and food services specializing in meeting the needs of our busy lifestyles and various nutritional needs, and personal fitness.

ES managers noted that the Targeted Initiative For Older Workers program was successful and would consider offering this program again to long term unemployed workers especially those displaced & requiring a career change should funding be available.

OSEB

OSEB training does meets the need for specialized training as more and more individuals are looking to self-employment over traditional employment, considering the economic importance of small and medium sized enterprises on the local economy and that provincial economy; some consideration for expanding the program should be a priority. In Durham Region, businesses are by far made up of small establishments. A stunning 58% of the firms in Durham Region have no employees, and another 23% have 1-4 employees.

OSEB noted that apprenticeable trade graduates often end up self-employed and that specialized assistance for the trades graduates where they can receive business training should be a program priority. Durham's Self Employment Benefit provider recommended the creation of a seven week post apprenticeship program for service trades to provide entrepreneurship training.

LITERACY

Literacy and Basic Skills programs in Ontario have faced adversity over the past decade due to flatlined funding mechanisms and the almost constant transformation of services (Ontario Adult Literacy Curriculum Framework, Performance Standards, EOIS CaMS). The LBS sector represents - both client volume and funding base - an exceptionally small representation of the overall Employment Ontario network. This being said, literacy and essential skills represent the training foundation of the EO network.

Increased service coordination amongst LBS and ES services has taken place in Durham Region since 2012 with both the Literacy Network of Durham Region and Durham Workforce Authority partnering to bring employment and literacy providers together regularly. In addition, LiNDR and DWA have facilitated service planning meetings with ES managers monthly. This has resulted in numerous benefits including enhanced referral tools, better coordination of client services and ongoing discussion for innovation and partnership. This being said, this service coordination is unfunded and presents a burden of work not currently aligned with either organization's budgetary constraints.

In order for LBs and ES programs to improve referral outcomes between sectors, enhanced service coordination, regular staff training and ongoing support is required to ensure a smooth flow of clients. Increased funds for local service coordination and LBS delivery should be earmarked by MTCU to support it's own self-identified training foundation.

As noted in this document regarding exit outcomes and ES, apprenticeship and EO literacy training makes up only 1%. As a percentage of all ES clients, these figures are significantly smaller – in the case of apprenticeship and EO literacy training, around 0.1% of ES clients end up in either of these activities. In order to increase the numbers of clients exiting to apprenticeship and LBS, it is critical that enhanced and continued service coordination be supported. Also, LBS must be empowered to flexibly expand their services in the community beyond the current level that it delivers. Agile, responsive programming and partnership are key to increasing the training at exit outcome numbers for Durham.

Section three Action Plan

The DWA action plan follows three themes: *to inform, to attract and retain, and to develop.*

Each action is placed within one of the three themes and seeks to address key labour market issues in the region with proposed timelines for completion.

The labour market plan has been created as a rolling three-year plan therefore not all of the recommended actions will be implemented immediately.

To Inform

There is a distinct need for more localized, sub CMA information and the broad sharing of information.

Labour Shed

It was recommended that DWA keep an up-to-date inventory of data that is more 'just in time' data. The Statistics Canada and census date is often 5-7 years old and is not drilled down to Durham's sub CMA data to allow for distinct community planning. Data that is useful for industry attraction is difficult to acquire and seldom collected. The DWA has plans to undertake a multi-phased Labourshed survey to be conducted on our behalf by the University of Ontario Institute of Technology to collect local data and continue to explore our assets within the creative economy, the service class and sector studies to provide value-added labour market information.

Labourshed Study

A Labourshed study is a tool to understand the local labour market through the collection and description of labour force data such as worker availability, current employment status, current/desired wage rates, job qualifications and skills, residence/work location, age cohorts, distances willing to travel for employment, and employment requirements and obstacles. This information allows numerous groups such as economic developers, employers, and regional residents to make informed decisions about employment, facilitation of industry expansion, and recruitment.

The Durham Region Labourshed study will consist of various parts. The first component will situate Durham Region as the employment centre and determine where the region's employed workers reside. The collection and analysis of aggregate counts of employee postal codes requested from employers, will aid in determining the areas of which Durham Region draws its workers. This part of the study will shed light on commuter patterns such as inter-regional and intra-regional commuting, and highlight the various characteristics such as age, gender, skills, and education of these Labourshed workers.

The second part of the study will focus on Durham Region's residents generally. The survey will ask about employment and commuting characteristics to help determine the employment status of residents, where the majority of employed workers in Durham Region go to work, the type of work they execute, and their income. A telephone survey conducted on a random sample of Durham Region's residents will help determine the availability and characteristics of workers within the region.

Finally, Durham Region employers will be surveyed about their experiences and perceptions of the region. This will include questions inquiring about labour availability, worker quality, and methods used to recruit workers. This part of the survey will help in calculating future workforce demand and trends and round out recommendations and next steps to be included in the final report.

Status

Initial pilot labour shed study was launched in late June 2013, in partnership with UOIT, marketing intiatives to increase response rates are ongoing, it is anticipated that a draft report will be shared with the planning community in December 2013

Sub CMA or sector Labourseds in 2014 and 2015

Outcomes

Planning committee

Labourshed Report

Work plan for future Labourshed reports

Partners

Region of Durham Economic Development Department, Local Economic Development Departments, Top 20 employers in Durham Region, City and Municipal Government, UOIT, Durham College, Labour Unions

DWA Support for Durham's Creatvie Economy

The DWA participated in two events with the Community Innovation Lab. The Community Innovation Lab (Co-ilab) creates experiential opportunities to enable students to apply their talent, acquire new skills, network with industry and community leaders.

Ignite

Ignite grows the small to medium sized business in Durham Region and is an extension of the Art of Transition 2010 event. Small to medium sized enterprise (SMEs) received business coaching by an expert panel, the community highlighted the significant economic impact of small business to Durham's economy.

Status

Ignite

Ignite finale was held June 25^{th}, at the Regent Theatre, 400 community partners attended event. The DWA will continue to follow the progress of the 100 SMEs who participated in the original pitch event.

Decoding Youth Unemployment and Catalyzing a game plan

An interactive forum was held in partnership with the Co-ilab July 10, when a diverse group of community leaders from service providers, educators, police and community groups attended to discuss youth unemployment in Durham Region.

Durham Ideas Den

Durham Region's first social innovation challenge invited youth to submit ideas for ventures that will benefit communities for a chance to win mentorship opportunities and more than $16,000 in awards. The Durham Ideas Den 2013 offered post-secondary students an opportunity to bring their ideas to life by designing projects that reflect of one of the following five themes: re-thinking poverty, re-thinking transportation systems, re-thinking youth engagement, re-imagining the image of the region and re-thinking climate change.

Outcomes

Small to medium sized business received business coaching by an expert panel, large community event held.

Decoding Youth Unemployment event provided community partners with information to be used in community planning.

Durham Ideas Den provided mentorship coaching for three youth organizations. DWA executive director provided a labour market seminar.

Partners

Region of Durham Economic Development Department , Spark, DSEA, BACD, Community Innovation Lab, Durham College, UOIT

Service Class Prosperity

Data shows that the rise in creative class workers over time has been accompanied by a corresponding rise in service class workers.

Wage challenge

Typically, the wage gap for creative and manufacturing is significant. In Durham, creative wages mimic those of manufacturing. The challenge is the displaced worker who expects the wage to transfer to other occupations after a disolcation from manufacturing, these displaced workers often lack the education and skills critical to creative economy occupations.

The demise of a Fordist mode of production has contributed to new interest (of researchers and policy-makers) in the "rise of a creative economy" and the general importance of cities to the creative process.

According to Richard Florida's *Great Reset*, there are two kinds of jobs that are growing: higher paid knowledge, professional service class as an occupational grouping of typically low-pay service jobs. Given the shrinking size of the manufacturing sector and the increasing demand for services, manufacturing is now less important to Ontario's economy than in the past.

Given that there are stagnating numbers of unemployment in Durham Region exploring the service class as an emerging important sector for Durham should become a priority in both research and application.

Status

2014 – not started

Outcomes Report and recommendations for local initiatives
Partners Durham College, UOIT, Chambers of Commerce, Boards of Trade, Tradeability, Employment Ontario Service Providers, Search Engine People

People without Jobs Dr. Rick Miner's ground breaking report highlighted a mis match of jobs and skills. He noted that immigration and youth will be key players in the growing economy. The DWA will explore un filled jobs in Durham and create a strategy to move workers into those occupations.
Status 2015 – not started
Outcomes Event featuring Rick Miner and local employers Project Steering Committee Final Report and recommendations
Partners Durham District School Board, Durham Catholic School Board, Durham College,UOIT Employers in the five emerging sectors, BACD, OSEB, Employment Ontario Service Providers, Region of Durham Economic Development Department

Clusters/Creative/Community Adjustment and Sustainability Strategy Combining Labour Market Information (LMI) and a cluster approach gives local communities the tools and framework to plan ahead, coordinate activities, and assist in providing services that are aligned to the needs of their communities. Accessing accurate information and defining targeted areas of opportunities is the key to an evidence-based approach to workforce planning and development. (Organisation forCooperationandDevelopment2007). By focusing on the needs of the five growth sectors identified in the ReThink ReNew ReTool community adjustment and sustainability strategy the DWA will organize an ongoing series of consultations with industry and union representatives and others that can project future labour requirements and assess current and future labour supply and prioritize anticipated shortages.
Status 2015 – not started
Outcomes Report and recommendations Seminar on clustering in partnership with BACD, Chambers of Commerce and Boards of Trade
Partners BACD, Chambers of Commerce and Boards of Trade, MTCU, Region of Durham Economic Development

Department, UOIT

ES Support The Ministry of Training Colleges and Universities (MTCU) has made changes to the Durham Workforce Authority's (DWA) business planning requirements. As per the business planning guidelines, the DWA will focus on Employment Ontario and the broader support service network. As per the recent changes to the DWA's business planning requirements, four sessions have been planned to support the Employment Ontario Network. The DWA will leverage the scheduled meetings of the Literacy Network of Durham (LiNDR), who also has a requirement to support the Employment Ontario Network through service coordination of literacy referrals. The DWA will provide value-added content to the planned meetings. Workforce planning boards and regional literacy networks play a role in developing tailor-made approaches to effective workforce development.
Status Four sessions planned with Employment Ontario Service Providers for 2013-2014 April, June, October, February ES providers were invited to a Learning Communities seminar, specialized training at the Literacy Network of Durham's AGM sponsored by the DWA. October events were not feasible, additional LMI training is planned for February in partnership with the Literacy Network and the DWA economist.
Outcomes Employment Ontario Service Providers, Literacy Service Providers and the broader community will better understand essential skills, labour market information, EOIS Cams data, Labourshed, and information and referral protocols.
Partners Literacy Network of Durham, MTCU, Chambers of Commerce and Boards of Trade, DDSB, DCDSB, Durham College, Trent, UOIT

CASS Report Card The DWA will report on the outcomes of the 2009 strategy and provide recommendations to the broader community for additional initiatives.
Status 2015 – not started
Outcomes Community consultations Report and Recommendations

Partners

Durham Region Chambers of Commerce and Boards of Trade, Oshawa Public Library, Whitby Public Library, Ajax Public Library, Pickering Public Library, Durham District School Board, Durham Catholic District School Board, UOIT, Durham College, Ministry of Training, Colleges and Universities, Municipality of Durham Economic Development and Tourism, Regional Municipality of Durham Planning, Service Canada, Toronto Region Research Alliance

Migration Patterns

A review of migration characteristics and trends for Durham Region and understand how migration interrelates with adjacent communities. Additionally, understanding commuting pattern data, showing for each geography who commutes into and out of each area. Findings from this research will show what effects migration has on the labour market.

Status

November 2013

Outcomes

A report highlighting migration characteristics & trends and their impact on the labour market

Understand the impact of migratory trends on population growth and decline

Understand migration characteristics; migration by age cohort and type (in-migration; out-migration; Intra-provincial; inter-provincial; international)

Understand where the jobs are based on commuting patterns

Partners

Peel Halton Workforce Development Group , Toronto Workforce Innovation Group, Durham Workforce Authority, Simcoe Muskoka Workforce Development Board, Workplace Planning Board of York Region and Bradford, West Gwillimbury

Attract and Retain

Based on knowledge as to where the supply of labour is, or is expected to be, insufficient to meet the demand, engage key stakeholders who are sources of potential supply and develop a course of action to address these needs. Develop and implement internal and external recruitment strategies to address the imbalance. Monitor and adjust the strategies based on outcomes.

Agriculture Day

The DRLTB has participated in the Annual Farm Tours with the Durham Agricultural Advisory Committee, Regional Municipality of Durham Planning Department, local Municipal Government, and the farming community for the past ten years.

The DRLTB has also partnered with DAAC and Durham Farm Connections to bring farming occupations presentations to high school students.

The 2012 Integrated Local Labour Market Plan (ILLMP), included the following recommended action "Support the development of experiential farms, business incubators, a technology and innovation park, and other pilot projects, that will transition displaced workers into alternative forms of sustainable employment and/or introduce new approaches to our local labour market and economy. Explore opportunities to apply key findings from the Martin Prosperity Institute's "Ontario in the Creative Age" report. Host a summit conference in the region followed by one or more pilot demonstration projects. These initiatives will be dependent on completion of feasibility studies and securing of grants and program funding."
Status **2014** - In partnership with Durham District and Durham Catholic School Boards as part of both school boards professional development program, present an '***Agriculture In Durham***" arrange a tour for secondary school teachers of Durham College's Centre for Food and its renewable energy programs combined with panel presentations from Durham College, UOIT and DAAC to present agricultural education pathways available in Durham Region. A second panel presentation focused on the Region of Durham's agriculture plan combined with local industries that represent Durham's agriculture and biosciences sector who would present agriculture and bio sciences local employment opportunities. **2015, 2016** - Work with DAAC and Region of Durham Planning Department and the Local Diversity and Immigration Partnership Council to create a feasibility study for an experimental farm in Durham Region with a focus on immigrant food. Consider options for food processing.
Outcomes This event is an opportunity to have Durham College, UOIT, Region of Durham and front line business owner speak to industry trends, future employment prospects.
Partners Region of Durham Planning Department, Region of Durham Economic Development Department, Tradeability, DDSB, DCDSB,KPDSB, KPCDSB UOIT, Durham College, Whitby Chamber of Commerce

Industry Tours for Educators Organize fourth annual tour for secondary school teachers of local industries that represent Durham's emerging growth sectors. (sustainable energy, automotive/transportation, IT, health and wellness, agriculture and biosciences) This is an opportunity to have the front line business owner speak to industry trends, future employment prospects. Curb negative out-migration of youth. 2 or more industry sectors to participate in design of ongoing communications strategy. Promise of future employment and awareness of local opportunities for youth on graduation.
Status Focus will be on Clarington in 2013, with three industries identified from advanced manufacturing, and food processing. Tour will take place in November. 2014, 2015, 2016

Outcomes

70 teachers will understand local pathways to Durham Region employment opportunities

Partners

Durham Catholic District School Board, Durham District School Board, Kawartha Pine Ridge Victoria Northumberland District School Board, Regional Municipality of Durham Economic Development and Tourism

Career Ladders - Demonstration Partnerships with LiNDR

Career laddering seeks to serve employers by creating pathways for advancement based on work experience and credentialed job-related training. (Zizys, 2010) Dr. Rick Miner, in *People without Jobs, Jobs without People* indicates a looming labour shortage; career laddering may be one of the tools to address this shortage.

The DWA has partnered with the Literacy Network of Durham to move the Career Ladders pilot project forward in Durham using a community model.

Status

The DWA in partnership with the Literacy Network of Durham, will lead a demonstration pilot project in a selected sector. This will create an economic case for career laddering, identify return on investment that demonstrates the case for training and workforce development, allowing for targeted and customized programs that provide on the job training with imbedded literacy training.

The environmental scan was created and submitted to Essential Skills Ontario and a steering committee has been selected. First Career Ladders committee meeting will take place October 25th.

Outcomes

Demonstration pilot involving Durham Region business
Final report

Partners

LINDR, MTCU, Economic Development Departments, Ontario Works, OSEB, Employment Ontario Service Providers

Sector Studies

The DWA will update it sector studies with the 2011 Statistics Canada data to be released in June 2013. Updated reports will be provided with the October LMP release.

The DWA has completed sector studies in Nuclear Energy, Construction and Apprenticeable Service trades sector.

Status

2013 – Update sectors studies with new Statistics Canada data and act on one recommendation from the initial report – Not started. 2014 – Write, research and make recommendations for Durham's participation in the Service Sector as it relates to the creative economy 2015 – Conduct a Health and Wellness sector study
Outcomes Up to date sector studies, report recommendations auctioned, additional sector studies created for broader community**.**
Partners MTCU, Region of Durham Economic Development Department, DSEA, BACD, Lakeridge Health, Hillsdale Manor, tradeability

To Develop

There are opportunities for Durham to reinvent itself and adopt unique strategies to transition and grow a new generation labour force, a labour force that is less susceptible to the unpredictable long term negative impacts of future recessions, impacts of globalization and an aging workforce.

Local Diversity and Immigration Partnership Council Description Support the creation of an integrated settlement and information centre in Durham for newcomers and immigrants. Provide skills development opportunities for new immigrants through the development of mentor-mentee relationships, work placements, peer support programs involving successfully integrated immigrants, and the use of skills assessment tools to fast track those with existing training. Develop a comprehensive proposal and secure government funding to create a model centre that will meet the unique needs of immigrants in Durham Region.
Status DWA Executive Director is a member of the LDIPC
Outcomes DWA will provide labour market information to the website
Partners Region of Durham, CDCD, MTCU, Libraries

Youth Unemployment To ensure Durham's prosperity and curb out-migration of prime working populations, initiatives must be explored to increase labout market attachment of Durham's youth population. The DWA in its consultation with local youth organizations discovered a need to undertake a survey of Durham youth to

better understand their programming needs. The DWA will complete the survey process by October 31, 2013 and produce a report in late November that will be shared with the broader community. The DWA will partner with youth serving organizations to develop a survey and focus groups to better understand youth unemployment. The DWA will use that research to support community organizations and make recommendations for service if gaps exist.
Status Due to unexpected high levels of youth unemployment in Durham Region, the DWA created and released the survey to the broader community in June 2013. The online survey was promoted at community events throughout the summer, the Durham District School Board had authorized its distribution on their website and in selected grade 10 career classes. Community organizations offering youth programing have also participated. (Boys and Girls Club of Durham and John Howard Society).