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Simcoe Muskoka
Workforce Development Board

OCTOBER 2015 Local Labour Market Plan

This Employment Ontario project is funded by the Ontario government.

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EMPLOYMENT ONTARIO

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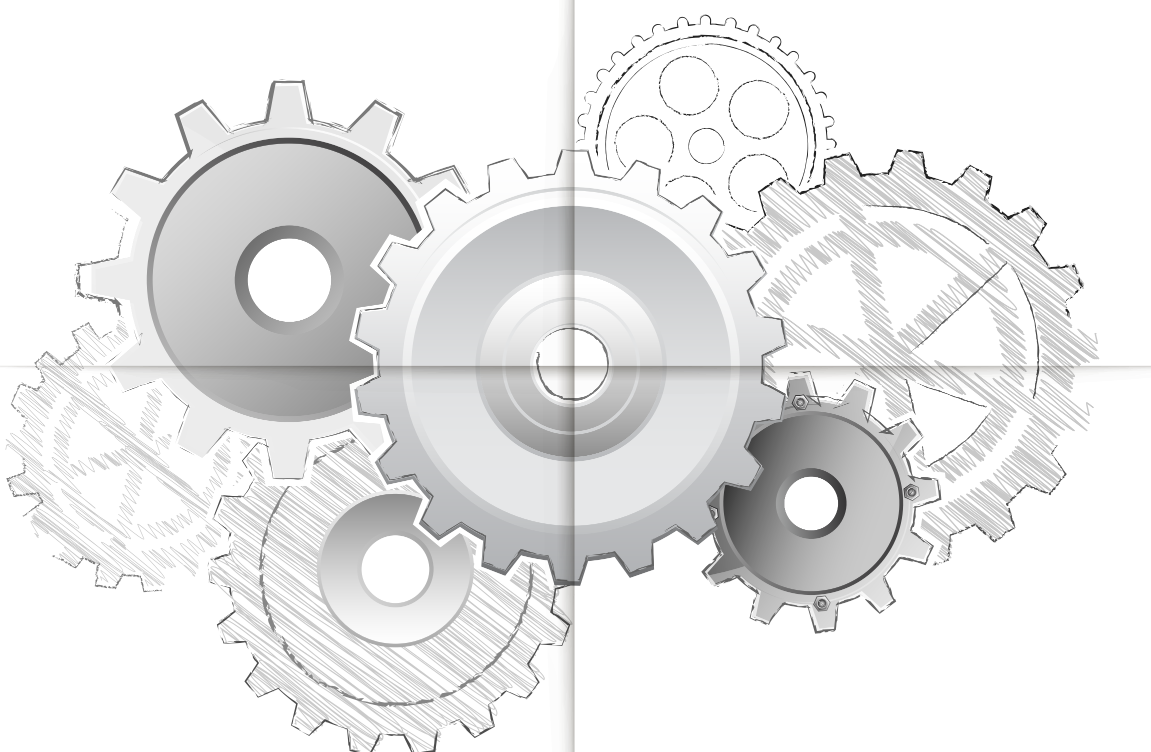
Simcoe Muskoka
Workforce Development Board

WHAT WE DO

RESEARCH
Analyze and identify priorities and opportunities

CONVENE
Bring groups together



EVALUATE
Measure, refine and add value

COLLABORATE
Take action through partnerships

About the Simcoe Muskoka Workforce Development Board Local Labour Market Plan

Simcoe Muskoka Workforce Development Board (SMWDB) Local Labour Market Plan for October 2015 is an annual review of the progress on our area's partnership projects and up-to-date information on employment conditions in our community. Our evidence based process includes:

- Analysis of data from Canadian Business Patterns and National Household Survey
- Insights from Employment Ontario data, describing clients and their outcomes.
- Sector-based information from local employers
- Workforce information from Community Partners
- Review of local media and new literature reports

SMWDB, together with local thought leaders, regularly engages with our communities to identify local issues and examine them in the context of available labour market data. This process builds an evidence-based foundation for a strategic framework, which can highlight emerging trends in our local labour market and propose actions that will address these concerns.

We thank all employers, community partners and organizations who have contributed through consultations, conversations, and/or data sharing. Additionally, we would like to thank Tom Zizys for his work in analyzing data and developing tables for this report.

We trust this compiled, local information is a valuable tool for your organization, and welcome questions, comments and suggestions regarding our future partnerships, projects or resources.

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Simcoe Muskoka
Workforce Development Board

18 Alliance Blvd. Unit 22,
Barrie, ON L4M 5A5
tel: 705.725.1011
or 1.800.337.4598
fax: 1.888.739.8347
Email: info@smwdb.com
Web: smwdb.com

A member of

Workforce Planning Ontario
www.workforceplanningontario.ca

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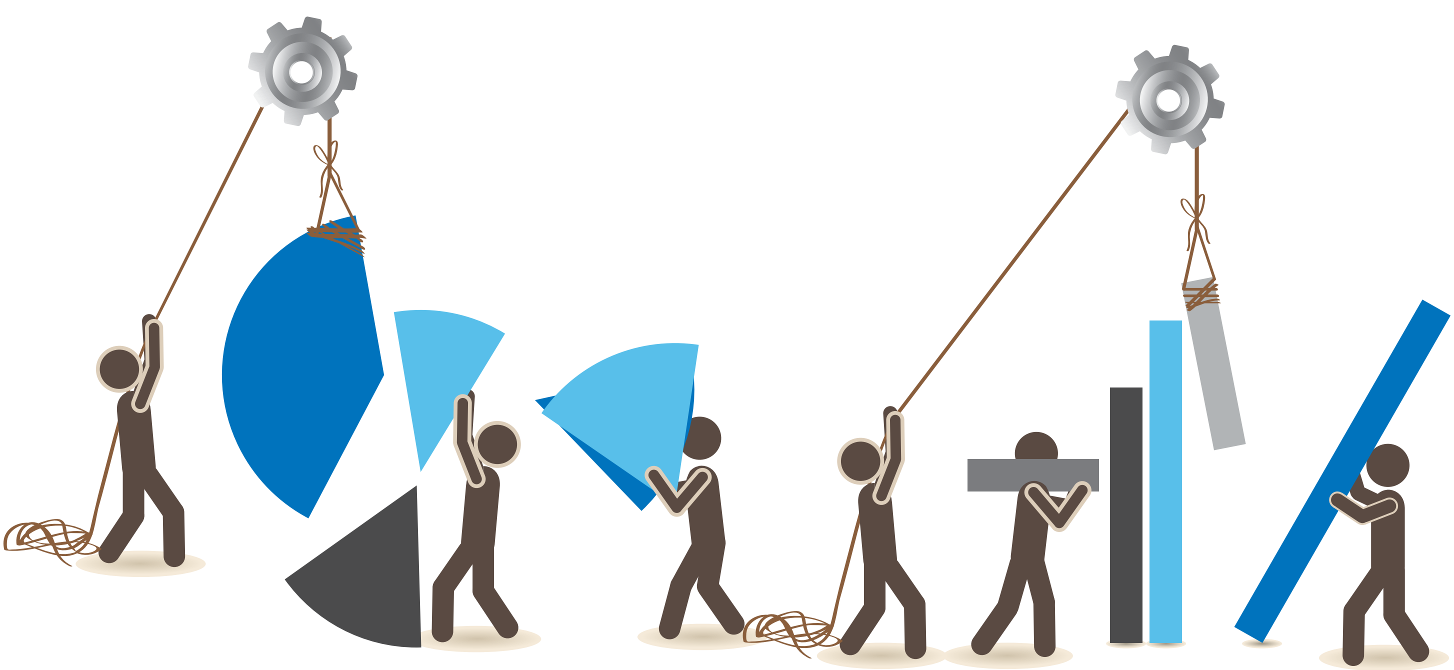

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Summary of Labour Market Overview

The following summary, charts and analysis have been prepared by Tom Zizys.

Labour Market Indicators

Population change. In between the Census, which is taken every five years, Statistics Canada develops population estimates, based on the components of population change for each area. Both Simcoe and Muskoka are estimated to have had higher levels of population growth, increasing by 4.4% and 2.1% respectively between 2011 and 2014. Simcoe's population growth during this period places it in 4th spot among Ontario's 49 census divisions, behind only Halton (6.5%), Peel (5.6%) and York (5.3%). Muskoka ranked 15th.

Migration patterns. Based on the 2011-12 and 2012-13 data, one can say that each year, for both Simcoe and Muskoka, a figure equivalent to each area's population leaves, while a figure equal to 4% of the area's population moves in. Both Simcoe and Muskoka experience a positive net migration across all age groups except for a slight net loss of youth (18-24 year olds).

The three top areas for migration both to and from Simcoe are York, Toronto and Peel, but in each instance, Simcoe posts the net gain.

Both Simcoe and Muskoka experience a positive net migration across all age groups except for a slight net loss of youth (18-24 year olds).

The three top areas for migration both to and from Muskoka are Simcoe, Parry Sound and Toronto, and in each instance, Muskoka posts the net gain.

Unemployment trends. There is no easily accessible data for unemployment rates for Simcoe and Muskoka. However, there is data for the Barrie Census Metropolitan Area (CMA) as well as for the Muskoka-Kawarthas economic region. A good comparison is to look at the unemployment rate for Ontario minus the Toronto CMA (simply because the Toronto area experiences slightly different unemployment dynamics). With the start of the recession in 2008, unemployment rates across all Ontario shot up and, by 2010, the unemployment rates for the Barrie CMA and for Muskoka-Kawarthas were higher than those for the rest of Ontario (minus Toronto). The unemployment rates have been coming down and in 2014 the rates for the Barrie CMA and for Muskoka-Kawarthas dipped below the rate for the rest of Ontario (minus Toronto).

In comparative terms, youth in particular bore the brunt of the recession, although in the Barrie CMA their unemployment rate has usually been three times that of adults, even before the recession. Only in 2014 did the youth unemployment rate come down sharply to 11.1%, still almost two and a half times that for adults at 4.8%.

UNEMPLOYMENT RATE YOUTH V.S. ADULT 2014

YOUTH 11.1%

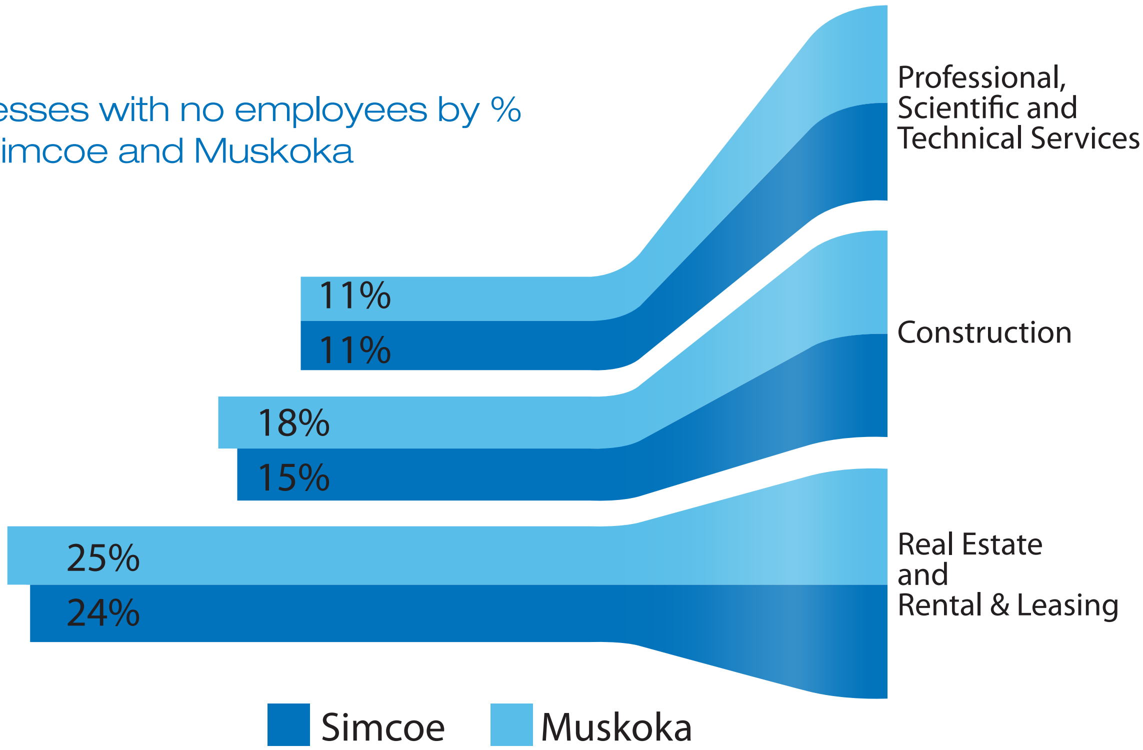
ADULT 4.8%

Just prior to the recession, the unemployment rate in the Barrie CMA for females was higher than that for males, but with the recession, the male unemployment rate shot up, while it took another year before the female unemplyment rate followed suit. Since then, the female rate started dropping sooner, and has continued to stay below the male unemployment rate. In 2014, the female unemployment rate for the Barrie CMA was 5.4%, below the male rate of 6.7%.

Number of Businesses

Statistics Canada maintains an on-going count of business establishments across the country, relying on administrative data (corporate income tax and GST files) and surveys of businesses, called Canadian Business Counts. Due to changes in data gathering and reporting practices, this data cannot be compared to the data of previous years, so instead of highlighting trends, the data this year can only provide a snapshot about the number of businesses in Simcoe and Muskoka in June 2015. The data can be divided between businesses with no employees (self-employed entrepreneurs) and businesses with employees (employers).

Mix of businesses with no employees by % comparing Simcoe and Muskoka



Among businesses with no employees, by far the largest categories are as follows (the percentage figures indicate the proportion of all such businesses in that industry):

Simcoe:

- Real Estate and Rental & Leasing (24%)
- Construction (15%)
- Professional, Scientific and Technical Services (11%)

Muskoka:

- Real Estate and Rental & Leasing (25%)
- Construction (18%)
- Professional, Scientific and Technical Services (11%)

Among businesses with employees, there is a somewhat different mix:

Simcoe:

- Construction (16%)
- Retail Trade (14%)
- Health Care & Social Assistance (10%)

Muskoka:

- Construction (24%)
- Retail Trade (15%)
- Accommodation & Food Services (8%)
- Health Care & Social Assistance (8%)

Survey of Employers

SMWDB together with many community partners, administered its 2nd annual on-line survey to employers. In total, almost 200 responses were received. The main highlights of the survey were:

- Two factors in particular drive employer business decisions:
    - Ensuring customer satisfaction and good customer service
    - Seeking to deliver a quality product or service
- A slightly more distant third factor is keeping costs under control
- For those employers for whom keeping costs under control was an important decision driver, feeding their future talent pipeline was less of a consideration, while for those for whom cost was less of a driver, feeding their talent pipeline was a more important consideration
- Most employers rate community college and university bachelor grads equally with regards to a series of work-related attributes, however differences do show up
- Community college grads are seen as being somewhat better prepared for the workplace (technical skills, workplace familiarity), and university students score slightly better on soft skills and potential for advancement and leadership
- Community college grads are scored slightly higher on interpersonal skills and teamwork, while both sets of grads are scored equally the same on motivation
- When employers were asked to indicate the occupations for which they hired the most number of individuals over the last 12 months, 178 employers named at least one occupation, and even when these are collapsed into common occupations, around 100 different jobs are named, highlighting the great variety in hiring patterns; the top two occupations named were sales and customer service representative and general labourer, each receiving 12 mentions
- When asked about occupations that are most difficult to fill, employers similarly provided a wide range of occupations, with 154 employers naming at least one occupation – the most frequently mentioned was housekeeping, with six mentions
- Employers have a lukewarm assessment of the availability of qualified workers in their local area: among the answer options of Excellent, Good, Fair and Poor, the average response was "Fair"
- Smaller firms were more likely to provide a poorer rating; firms in Muskoka were much more likely to provide a lower rating, while firms in Barrie and Orillia were more likely to provide a more positive rating
- The most prominent reason why employers go outside the firm to hire is to bring in a particular expertise, or to add depth to the skills among their workforce; that is, it is to bring in skills
- Word-of-mouth remains the recruitment method most relied upon by employers, with half saying they use it always; a close second is on-line job board

For further details refer to page 31.

- The strategies for recruitment that employers are most satisfied with all involve the immediate social network of the firm: employee recommendations, internal postings and word of mouth; the mechanisms that attract the least satisfaction are newspaper ads, walk-ins and job fairs
- The two most prominent concerns that employers find during the recruitment process are:
    - Applicants are not meeting the work experience requirements
    - Applicants are not meeting motivation, attitude, or interpersonal skills requirements
- Low on the list are concerns that typically attach to newcomers:
    - Applicants' familiarity with Canadian business culture, practices
    - Applicants' ability to converse in everyday conversational English
    - Getting recognition of applicants' professional designations
- Scoring slightly higher are two other language-related issues, which may suggest that non-immigrant candidates are also scoring lower in terms of these attributes, namely:
    - Applicants' ability to converse at a higher functioning English
    - Applicants' English writing skills

Insights from Employment Ontario Client Data

- The Employment Services numbers for the SMWDB area show a high degree of consistency, both among the Unassisted and Assisted client figures, as far as their share of the total Ontario numbers: the Unassisted figures hover at 3.7% and 3.6% for the last two years, and the Assisted numbers come in at 3.3%, 3.3% and 3.1% for the last three years. By way of context, the SMWDB area held 3.7% of the province's population, and in 2014 hold approximately 3.5% of the province's unemployed, so that all these figures are in the same range
- Older adults (aged 45-64 years old) make up a much larger share of the ES Assisted client numbers in the SMWDB area than elsewhere, and higher than their share of the unemployed
- Youth have been a growing share of the ES Assisted client base, rising from 21% in 2012-13 to 29% in 2014-15, a considerable increase
- The female share of ES Assisted clients has gone down slightly in the SMWDB area, even as their share of the unemployed provincially has gone up
- There has been a continuing decline in the percentage of Internationally Trained Professionals (ITP) across the boards in the Central Region, as well as in Ontario; in the SMWDB area, ITPs make up a comparatively small proportion of clients (around 5-6%)
- In the SMWDB area, there is a far higher proportion of ES Assisted clients with a high school diploma only, whereas individuals with a university degree are a rather small component of the client numbers
- There have been virtually no changes in the profile of ES Assisted clients by their source of income, apart from a slight decline in the proportion of clients receiving Employment Insurance and a slight increase in the proportion of those reporting No Source of Income
- The proportion of ES Assisted clients who have been unemployed for over a year remains at around two and a half times their share of all unemployed in the province
- There has been an increase in the proportion of employed outcomes among ES Assisted clients at the local level, compared to last year, slightly larger than the improvement registered at the regional and provincial levels
- A few industries are prominent among both lay-off data and employment outcome data for ES Assisted clients at the local level: Accommodation & Food Services; Administrative & Support Services; Construction; Manufacturing; Health Care & Social Assistance; and Retail Trade

- Of the top ten lay-off occupations, eight also make the list for the top ten employment outcome occupations at the local level, in almost all cases involving service sector entry-level jobs or labourer jobs in manufacturing or construction
- The proportions of Youth Employment Fund placements are fairly consistent across the local area, the Central region and the province; in a few instances there are exceptions: the SMWDB area has a higher proportion of placements in: Accommodation & Food Services and to a lesser extent in Construction. Otherwise, even though the differences are very minor, the SMWDB area has a distribution of placements closer to the Ontario profile than the Central Region profile
- Among Literacy and Basic Skills learners, the SMWDB area has experienced a shift from the previous year, with a considerable drop in the proportion of youth (from 39% to 31%) and a corresponding increase in the proportion of 45-64 year olds
- Women make up a larger proportion of Literacy and Basic Skills (LBS) learners at the local level (55%), and even more so at the regional (59%) and provincial (60%) levels
- The SMWDB area has a much larger proportion of learners who report no source of income, and that proportion has increased from the previous year (from 17% to 23%), as has the proportion of learners receiving Ontario Disability Support Program (ODSP) benefits
- The SMWDB area has seen a considerable increase in the proportion of learners who are unemployed (from 48% to 59%) and a corresponding drop in the proportion of learners who are full-time students (from 12% to 1%)
- The SMWDB area enlisted 184 individuals into the Second Career program last year, which represents 2% of the province's Second Career numbers, compared to a 1.7% share the previous year; this proportion is a bit more than half the area's share of the province's population (3.7%)
- Second Career clients tend to be either younger or middle-aged adults: slightly over half are aged 25 to 44 years
- In Ontario, the split between males and females among Second Career participants has been more or less equal; at the regional level, there are more females, while at the SMWDB level, there are more males (although that gap has narrowed somewhat from the previous year)
- The SMWDB area has a considerably higher proportion of Second Career clients who have a high school diploma (37%) and a smaller proportion of Second Career clients with a university degree, compared to elsewhere
- Transport Truck Driver is by far the largest training program subscribed to in the local region under Second Career, and it is also the largest Second Career training category in the province
- Outcomes at exit and at 12 months are fairly consistent across the local, regional and provincial areas: at exit, slightly more than a third of Second Career participants are employed, and at 12 months over 80% are employed; the employed results for the SMWDB area are slightly better
- The number of new apprenticeship registrations and active apprenticeships at the Board level is only slightly lower in comparison to the area's share of the general provincial population, however the regional figure is considerably lower
- At the SMWDB level, the percentage of new registrations (3.5%) is slightly lower than the percentage of active apprenticeships (2.8%)

Transport Truck Driver

is the largest second career training category in the province

Labour Market Indicators – Simcoe and Muskoka

Population

In between the Census, which is taken every five years, Statistics Canada develops population estimates, based on the components of population change for each area (births, deaths, migration), including adjusting the census numbers based on under-coverage from non-response. Table 1 presents the population estimates for each of Simcoe and Muskoka, for July 1 of each year, and provides the ranking for both of these census divisions in terms of rate of growth among the 49 census divisions that constitute the province of Ontario.

Both Simcoe and Muskoka are estimated to have had higher levels of population growth, increasing by 4.4% and 2.1% respectively. Simcoe's population growth during this period places it in 4th spot among Ontario's census divisions, behind only Halton (6.5%), Peel (5.6%) and York (5.3%).

SIMCOE AND MUSKOKA ARE ESTIMATED TO HAVE HAD HIGHER LEVELS OF POPULATION GROWTH:

SIMCOE
+4.4%

MUSKOKA
+2.1%

RANKING GROWTH AMONG OTHER CENSUS DIVISIONS IN ONTARIO:

SIMCOE
4th

MUSKOKA
15th

Table 1: Estimated population for July 1, Simcoe and Muskoka, 2011 to 2014

	2011	2012	2013	2014	% change 2011-2014	Rank
Simcoe	458,930	465,845	472,570	479,040	4.4%	4th
Muskoka	61,095	61,523	61,970	62,382	2.1%	15th

Statistics Canada, Estimates of Population, CANSIM Table 051-0062

Migration Patterns

The following tables provide the migration data for the County of Simcoe and the District of Muskoka, listing in-migration, out-migration and the net migration figures, by age categories for 2011-12 and 2012-13, the latest years for which data is available. In addition, the top ten places of origin for in-migrants and top ten destinations for out-migrants are provided for each area, offering the total number of persons in each instance.

Based on the 2011-12 and 2012-13 Simcoe data (Table 2), one can say that each year, a figure equivalent to 3% of Simcoe's population leaves the area, while a figure equal to 4% of the area's population moves in. Simcoe experiences a positive net migration across all age groups except for a slight net loss of youth (18-24 year olds).

With Muskoka (Table 3), the dynamic is much the same: roughly 3% leave the area each year, and a figure equivalent to around 4% of the area's population moves in, resulting in a net change due to migration of around 1% (0.8% based on an average of these two years). Like Simcoe, Muskoka gains population across all age categories except for a slight loss among youth.

TABLE 2: MIGRATION DATA, 2011-12, 2012-13
SIMCOE

	2011-2012			2012-2013		
	In-migrants	Out-migrants	Net migrants	In-migrants	Out-migrants	Net migrants
0-17 year olds	4335	2999	1336	3970	2650	1320
18-24 year olds	2405	2479	-74	2047	2354	-307
25-44 year olds	7440	5526	1914	6780	4704	2076
45-64 year olds	4680	3005	1675	4292	2746	1546
65 years & older	2140	1413	727	2122	1368	754
TOTAL	21000	15422	5578	19211	13822	5389

TABLE 3: MIGRATION DATA, 2011-12, 2012-13
MUSKOKA

	2011-2012			2012-2013		
	In-migrants	Out-migrants	Net migrants	In-migrants	Out-migrants	Net migrants
0-17 year olds	477	375	102	446	346	100
18-24 year olds	325	341	-16	260	325	-65
25-44 year olds	724	726	-2	692	585	107
45-64 year olds	794	475	319	729	415	314
65 years & older	386	324	62	329	283	46
TOTAL	2706	2241	465	2456	1954	502

Table 4 lists the top ten places of origin and destination for Simcoe, using the average figures for 2011-12 and 2012-13. The three top areas for migration both to and from Simcoe are York, Toronto and Peel, but in each instance, Simcoe posts the net gain – in the case of movement between Simcoe and York, Simcoe gains around 2800 residents a year in the exchange. On the other hand, Muskoka has a very slight net gain when it comes to movement between Simcoe and Muskoka.

TABLE 4: TOP TEN ORIGIN AND DESTINATION REGIONS AVERAGE FIGURE FOR 2011-12 AND 2012-2013 SIMCOE			
Moving to Simcoe from:		**Moving from Simcoe to:**	
York	4632	**Toronto**	2138
Toronto	3351	**York**	1790
Peel	2817	**Peel**	1029
Durham	712	**Muskoka**	533
Halton	660	**Durham**	519
Grey	546	**Grey**	489
Muskoka	516	**Ottawa**	374
Dufferin	481	**Waterloo**	347
Waterloo	320	**Edmonton area**	339
Hamilton	298	**Dufferin**	332

Table 5 lists the top ten places of origin and destination for Muskoka, using the average figures for 2011-12 and 2012-13. The three top areas for migration both to and from Muskoka are Simcoe, Parry Sound and Toronto, and in each instance, Muskoka posts the net gain.

TABLE 5: TOP TEN ORIGIN AND DESTINATION REGIONS AVERAGE FIGURE FOR 2011-12 AND 2012-2013 MUSKOKA			
Moving to Muskoka from:		**Moving from Muskoka to:**	
Simcoe	533	**Simcoe**	516
Toronto	295	**Parry Sound**	234
Parry Sound	274	**Toronto**	195
Peel	147	**York**	68
York	132	**Durham**	59
Halton	122	**Niagara**	55
Durham	113	**Halton**	55
Wellington	68	**Nipissing**	51
Hamilton	64	**Waterloo**	51
Waterloo	64	**Peel**	46

Unemployment Trends

While unemployment rates are regularly reported on a month-to-month basis, it is helpful to step back to look at the longer term trends. While the available data does not correspond exactly to the geography covered by the Simcoe Muskoka Workforce Development Board, the data that is accessible can provide some sense of the general trends in the area.

Certainly the data for Ontario as a whole provides the broader context – how does the local data compare to the aggregate provincial labour market figures? Secondly, there is data available for the Barrie Census Metropolitan Area (CMA), which includes the City of Barrie, together with Innisfil and Springwater. The employed labour force of the Barrie CMA represents approximately 41% of the employed labour force of the SMWDB area, and so is an important indicator.

As well, StatCan provides some data by economic regions, one of which is called Muskoka-Kawarthas, which includes Northumberland, Peterborough, Kawartha Lakes, Haliburton and Muskoka. While Muskoka only represents some 16% of the total employed labour force of this region, these figures can also be considered a possible data point for Muskoka.

Chart 1: Unemployment rates, Barrie CMA, Muskoka-Kawarthas, Ontario and Ontario minus Toronto CMA figures, 2007-2014

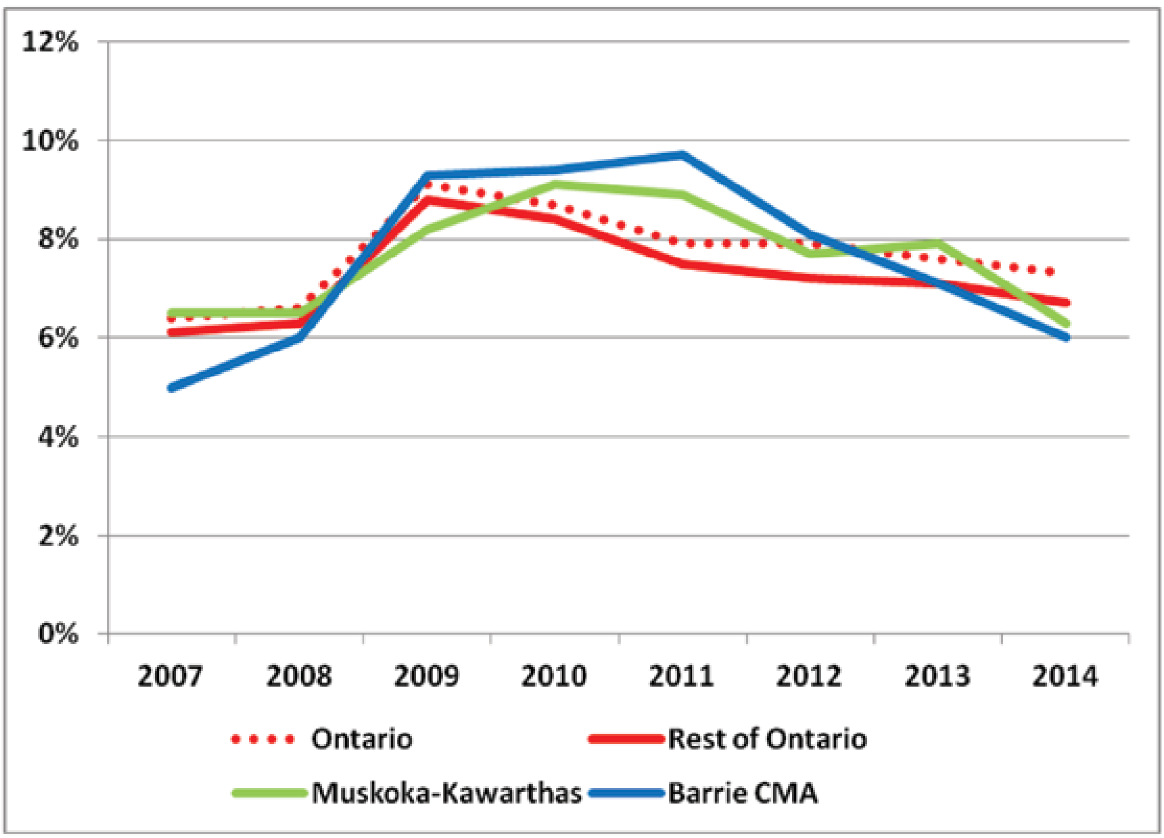


Chart 1 illustrates the unemployment rates over the period 2007 to 2014, for the Barrie CMA, Muskoka-Kawarthas and Ontario. In addition, a separate calculation has been made for Ontario minus the Toronto CMA figures, simply because the Toronto CMA often experiences a labour market dynamic different from the rest of Ontario, and it may be more appropriate to compare the SMWDB's performance to the rest of Ontario, rather than the Ontario figures which include the Toronto CMA.

With the start of the recession in 2008, unemployment rates across all the areas shot up, and by 2010, the unemployment rates for the Barrie CMA and for Muskoka-Kawarthas were higher than those for the rest of Ontario. The unemployment rates have been coming down, and in 2014, the rates for the Barrie CMA and for Muskoka-Kawarthas dipped below the rate for the rest of Ontario. Table 6 compares the unemployment rates for 2014.

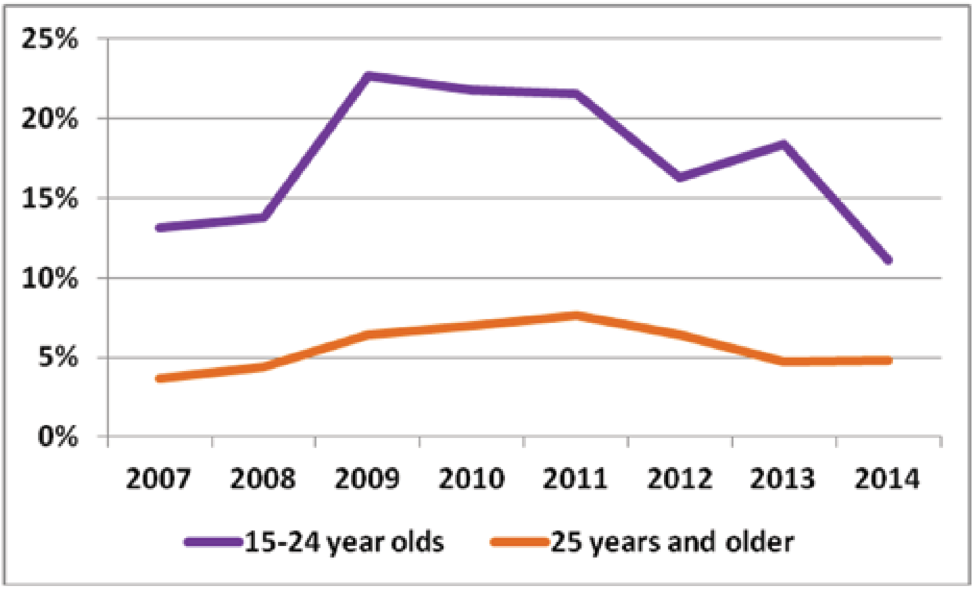
Unemployment figures by age group are only available for the Barrie CMA. Chart 2 provides the data for two age groups, youth aged 15 to 24 years of age, and adults aged 25 years of age and older.

Table 6: 2014 Unemployment Rates

Barrie CMA	Muskoka-Kawarthas	Ontario	Ontario minus Toronto CMA	Toronto CMA
6.0%	6.3%	7.3%	6.7%	8.0%

In comparative terms, youth in particular bore the brunt of the recession, although in the Barrie CMA their unemployment rate has usually been three times that of adults, even before the recession. Only in 2014 did the youth unemployment rate come down sharply to 11.1%, still almost two and a half times that for adults at 4.8%.

Chart 2: Unemployment rates by age, Barrie CMA, 2007-2014



Just prior to the recession, the unemployment rate in the Barrie CMA for females was higher than that for males, but with the recession, the male unemployment rate shot up, while it took another year before the female unemployment rate followed suit. Since then, the female rate started dropping sooner, and has continued to stay below the male unemployment rate. In 2014, the female unemployment rate for the Barrie CMA was 5.4%, below the male rate of 6.7%.

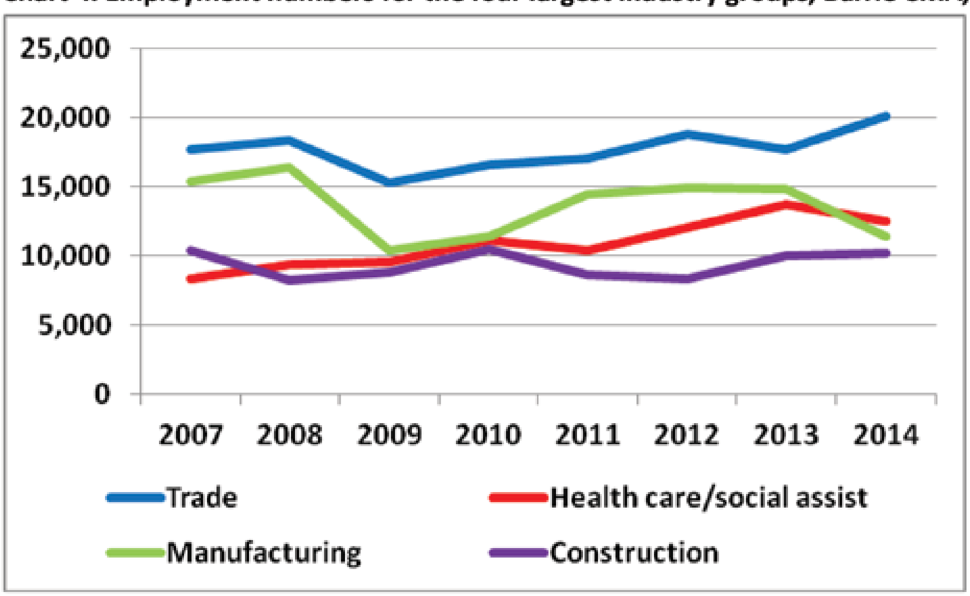
Employment Trends

In addition to tracking the unemployment rate, Statistics Canada's Labour Force Survey also collects data on the employed, including by industry and occupation. Charts 4 and 5 present the data for the four largest industry groupings in each of the Barrie CMA and the Muskoka-Kawarthas economic region. In both cases, the four largest groupings are: Trade (retail trade and wholesale trade combined); Health Care & Social Assistance; Manufacturing; and Construction.

By and large, the employment trends by these industries are relatively similar in both areas:

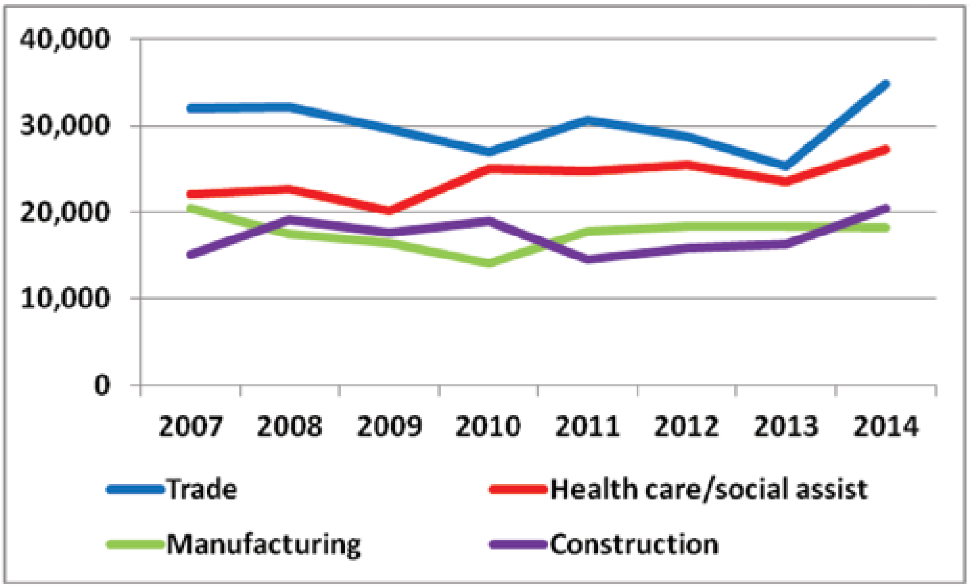
- The job numbers for Trade dipped as a result of the recession, but has since recovered and risen, although with a few ups and downs;
- Health Care & Social Assistance has seen a generally upward trend;
- Manufacturing also declined as a consequence of the recession, then recovered somewhat, but in Barrie declined again in 2014, whereas in Muskoka-Kawarthas it has held steady;
- For Construction, the numbers have dipped a couple of times, but in 2014 employment was at the same level as it was in 2007; in Muskoka-Kawarthas, employment dipped in 2011, but in 2014 the Construction employment numbers were around a third higher than they were in 2007.

Chart 4: Employment numbers for the four largest industry groups, Barrie CMA, 2007-2014



Two sectors that have witnessed a decline in employment numbers between 2007 and 2014 in both the Barrie CMA and Muskoka-Kawarthas are Educational Services and Public Administration. Meanwhile, an industry group which has experienced considerable growth during the same period in both areas is Business, Building and Other Support Services, which includes temp agencies and services that are often contracted out, such as cleaning, landscaping and security services. There is a concern that a growth of employment in this sector means a growth in lower-paying and often more precarious employment.

Chart 5: Employment numbers for the four largest industry groups, Muskoka-Kawarthas, 2007-2014



There is a concern that there is growth in lower-paying and often more precarious employment.

Canadian Business
Counts – Labour Market Indicators

Introduction

Statistics Canada maintains an on-going count of business establishments across the country, relying on administrative data (corporate income tax and GST files) and surveys of businesses. This registry of businesses used to be reported as Canadian Business Patterns. In the last year, Statistics Canada has changed some of its information gathering practices, as well as how some of the data is reported, to the extent that it would not be prudent to compare this data set to that of previous years. The most significant impact has been the addition of some 1,200,000 businesses without employees across the Canadian database. To signify all these changes, this data set is now called Canadian Business Counts.

Instead, only this year's data will be profiled and various components highlighted. To provide a context, some of this data will be compared to regional and provincial averages.

10%
SIMCOE

AND

8%
MUSKOKA

BUSINESSES ARE UNCLASSIFIED

Number of Businesses, By Size of Establishment and By Industry

Tables 1 and 2 provide the summary data for all businesses located in Simcoe County and the District of Muskoka for June 2015. The table provides two different counts:

1) All businesses, classified and unclassified: that is, whether or not their industry classification is known; this data is profiled in the size of establishment data; the last three rows of the table presents the distribution of these businesses by number of employees; roughly 10% of the total count of Simcoe businesses and 8% of Muskoka businesses are unclassified, both slightly lower than the provincial average of 12%;

2) Classified businesses: the breakdown of all businesses for which industry classification is available; this is the information provided by the industry rows in the table, the major part of this table.

The second-to-last column shows the percentage distribution of all classified businesses by industry.

The last column shows the ranking of the total number of classified businesses by industry, from the largest (1) to the fewest (20) number of businesses. The five industries with the most number of classified businesses have their ranking numbers bolded.

The highlighted cells identity the three industries with the largest number of firms for each employee size category column.

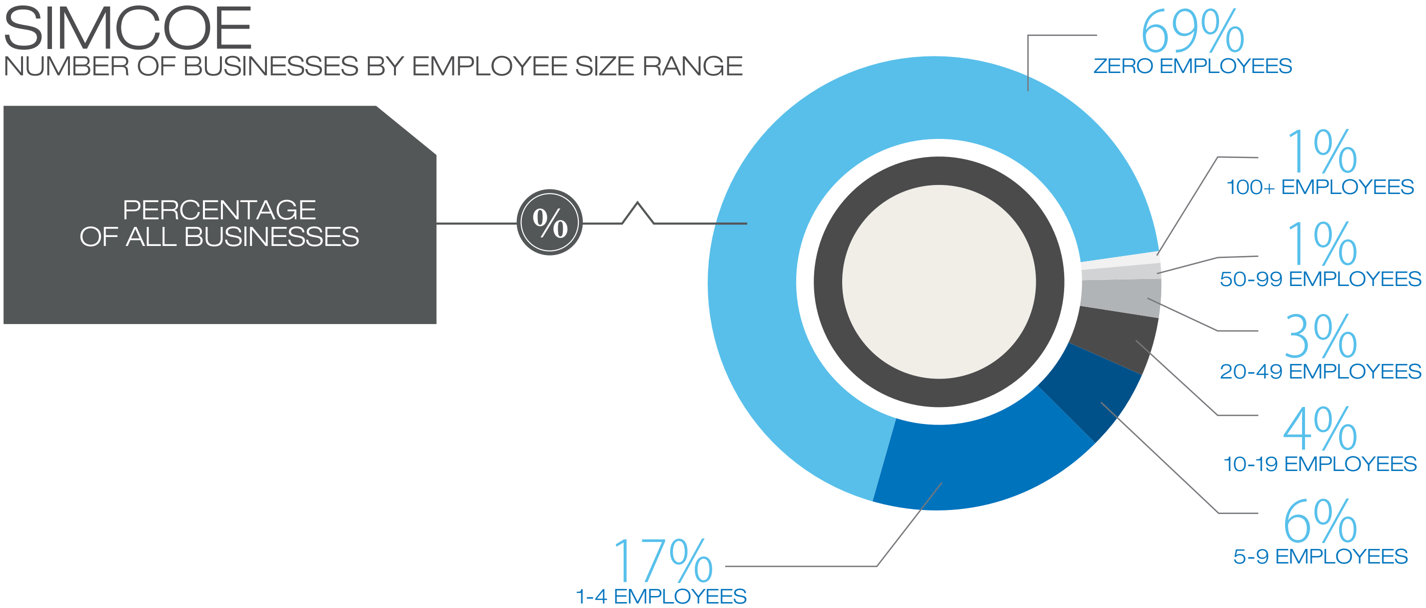
Where, under the percentage distribution a cell, has 0%, it does not mean there are no firms in that category, only that the number of firms, when expressed as a percentage of the total, is below 0.5% and has been rounded down to 0%.

TABLE 1 – SIMCOE
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE
JUNE 2015

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	1349	194	65	35	18	4	2	1667	4	10
21 Mining	34	12	10	15	6	2	0	79	0	19
22 Utilities	65	13	5	5	7	0	1	96	0	18
23 Construction	3883	1304	440	192	102	16	4	5941	15	**2**
31-33 Manufacturing	577	244	124	93	76	34	41	1189	3	13
41 Wholesale Trade	585	277	140	105	68	18	8	1201	3	12
44-45 Retail Trade	1610	663	488	368	188	64	49	3430	9	**4**
48-49 Transportation/Warehousing	1236	341	71	36	35	13	13	1745	5	8
51 Information and Cultural	299	65	29	6	27	2	1	429	1	16
52 Finance and Insurance	1290	226	60	63	76	2	0	1717	4	9
53 Real Estate, Rental, Leasing	6164	323	63	45	18	3	3	6619	17	**1**
54 Professional Scientific Tech	2958	882	163	82	44	6	2	4137	11	**3**
55 Management of Companies	710	55	9	8	6	4	1	793	2	14
56 Administrative Support	1212	359	145	69	48	17	20	1870	5	7
61 Educational Services	240	67	30	28	8	1	3	377	1	17
62 Health Care & Social Assist	1374	673	309	181	71	16	34	2658	7	6
71 Arts, Entertainment & Rec	443	91	43	38	34	9	7	665	2	15
72 Accommodation & Food	450	213	198	211	207	47	16	1342	4	11
81 Other Services	1690	742	289	104	36	5	1	2867	7	**5**
91 Public Administration	7	1	1	2	0	6	17	34	0	20
CLASSIFIED BUSINESSES	26176	6745	2682	1686	1075	269	223	38856		
Percentage of all classified and unclassified businesses	69%	17%	6%	4%	3%	1%	1%	100%		
Cumulative percentage	69%	86%	92%	96%	99%	100%	100%			
ONTARIO percentage of classified and unclassified businesses	69%	18%	6%	4%	3%	1%	1%			

Source: Statistics Canada, Canadian Business Counts

SIMCOE
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE



MUSKOKA
NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE

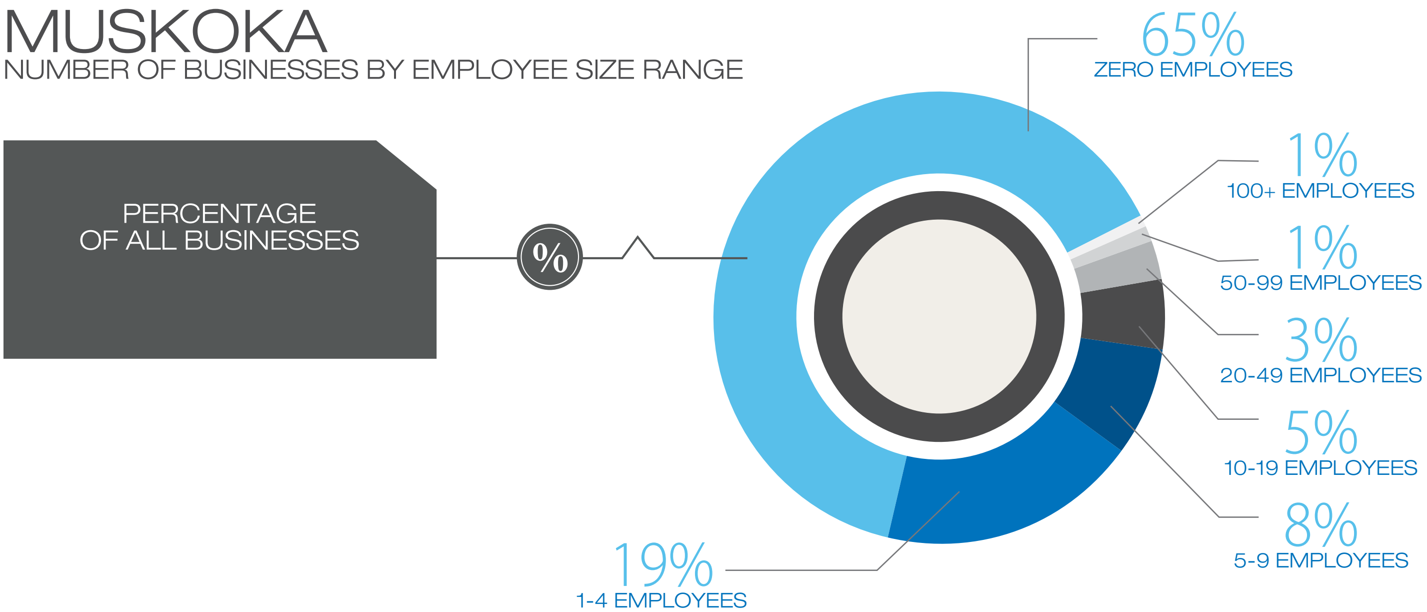


TABLE 2 – MUSKOKA NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE JUNE 2015										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	91	23	7	2	3	0	0	126	2	15
21 Mining	5	1	3	3	2	0	0	14	0	18
22 Utilities	6	2	2	0	2	0	0	12	0	19
23 Construction	777	345	157	78	23	0	1	1381	20	**1**
31-33 Manufacturing	97	46	18	13	13	6	3	196	3	11
41 Wholesale Trade	83	39	13	13	3	1	0	152	2	13
44-45 Retail Trade	296	141	105	91	35	6	10	684	10	**3**
48-49 Transportation/Warehousing	133	42	12	3	4	2	3	199	3	10
51 Information and Cultural	51	12	10	2	5	1	0	81	1	16
52 Finance and Insurance	235	49	10	12	13	1	0	320	5	9
53 Real Estate, Rental, Leasing	1087	71	18	11	3	2	0	1192	17	**2**
54 Professional Scientific Tech	471	136	35	10	3	1	0	656	10	**4**
55 Management of Companies	123	13	3	1	2	0	0	142	2	14
56 Administrative Support	214	80	37	16	12	1	0	360	5	7
61 Educational Services	31	7	4	2	1	0	0	45	1	17
62 Health Care & Social Assist	176	105	41	30	16	3	6	377	5	6
71 Arts, Entertainment & Rec	96	28	15	9	12	4	5	169	2	12
72 Accommodation & Food	124	46	49	40	49	11	9	328	5	8
81 Other Services	304	122	43	13	6	0	0	488	7	**5**
91 Public Administration	1	0	1	0	3	0	5	10	0	20
CLASSIFIED BUSINESSES	4401	1308	583	349	210	39	42	6932		
Percentage of all classified and unclassified businesses	65%	19%	8%	5%	3%	1%	1%	100%		
Cumulative percentage	65%	84%	91%	96%	99%	99%	100%			
ONTARIO percentage of classified and unclassified businesses	69%	18%	6%	4%	3%	1%	1%			

Source: Statistics Canada, Canadian Business Counts

Some Observations:

- **Number of small firms:** Businesses are by far made up of small establishments. 69% of the unclassified firms in Simcoe have no employees,[1] and another 17% have 1-4 employees; in Muskoka, there is a slightly smaller proportion of firms with no employees, at 65%; in both instances, the percentages of firms with 4 employees or less are close to the figures for Ontario (last line of the table);
- **Highest number of firms by industry:** The second to last column provides the percentage distribution of all firms by industry. The two industries with the largest number of firms are as follows: Real Estate and Rental & Leasing (in Simcoe, the largest sector, with 17.0% of all firms, in Muskoka, 17.2%, yet actually coming in second place; in both cases, the share is almost exactly the same as the provincial average of 17.6%; Construction (in Muskoka, the largest sector, with 19.9% of all firms, in Simcoe, the second largest sector at 15.3%; in both cases, much higher than the provincial average of 10.2%);
- **Highest number of firms by size and industry:** The three largest industries by each employee size category have also been highlighted. The table demonstrates how the large number of firms in the smaller size categories drives the total numbers (that is, for Real Estate and Rental & Leasing; Construction; and Professional, Scientific and Technical Services). In the mid-size ranges, firms in Retail Trade as well as Accommodation & Food Services come to the fore. Among the large firms, firms in Manufacturing and Health Care & Social Assistance join the top three lists.

SIMCOE

69%[1]
PERCENT OF UNCLASSIFIED FIRMS IN SIMCOE HAVE NO EMPLOYEES

BOTH SIMCOE AND MUSKOKA HAVE A HIGH PERCENTAGE OF BUSINESSES WITH NO EMPLOYEES

MUSKOKA

65%
PERCENT OF UNCLASSIFIED FIRMS IN MUSKOKA HAVE NO EMPLOYEES

1 This actually undercounts the number of self-employed individuals. The Statistics Canada's Canadian Business Count 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.

Self-Employed Entrepreneurs and Employers

The next two tables unpack the classified businesses and profile their distribution by industry.

Table 3 examines the distribution by industry of all businesses with no employees. This category is made up of a large number of real estate agents, construction tradespersons, consultants and owners of such services as auto repair shops, laundries and beauty salons.

Table 4 profiles the distribution by industry of all businesses with employees, that is, the employers. There are some significant differences in the distribution of businesses by industry, depending on whether one is looking at businesses with or without employees.

In both tables, the percentage distribution is also compared to that for the Central Region (York, Halton, Peel, Toronto, Durham, Simcoe and Muskoka) as well as for the province as a whole.

Table 3: Distribution of businesses with no employees

	SIMCOE	MUSKOKA	CENTRAL	ONTARIO
11 Agriculture, forestry, fishing & farming	5%	2%	1%	5%
21 Mining	0%	0%	0%	0%
22 Utilities	0%	0%	0%	0%
23 Construction	15%	18%	10%	10%
31-33 Manufacturing	2%	2%	2%	2%
41 Wholesale Trade	2%	2%	3%	2%
44-45 Retail Trade	6%	7%	5%	5%
48-49 Transportation/Warehousing	5%	3%	6%	6%
51 Information and Cultural Industries	1%	1%	2%	2%
52 Finance and Insurance	5%	5%	7%	7%
53 Real Estate, Rental & Leasing	24%	25%	24%	24%
54 Professional Scientific Technical Services	11%	11%	17%	15%
55 Management of Companies	3%	3%	4%	3%
56 Administrative and Support	5%	5%	5%	4%
61 Educational Services	1%	1%	1%	1%
62 Health Care & Social Assistance	5%	4%	5%	6%
71 Arts, Entertainment & Recreation	2%	2%	2%	2%
72 Accommodation & Food Services	2%	3%	1%	2%
81 Other Services	7%	7%	5%	5%
91 Public Administration	0%	0%	0%	0%

There is a high degree of similarity in the percentage distribution of businesses with no employees across Simcoe, Muskoka, Central Region and Ontario, with two prominent exceptions: both Simcoe and Muskoka have a considerably higher proportion of its solo operators in Construction, and a smaller proportion in Professional, Scientific & Technical Services. Around a quarter of such businesses are in the Real Estate and Rental & Leasing industry, a figure that is consistent for Simcoe, Muskoka, Central region and Ontario. Simcoe and Muskoka have slightly fewer of its businesses in Finance & Insurance, and slightly more in Retail Trade and in Other Services, compared to the Central Region and Ontario.

Table 4: Distribution of businesses with employees

	SIMCOE	MUSKOKA	CENTRAL	ONTARIO
11 Agriculture, forestry, fishing & farming	3%	1%	1%	2%
21 Mining	0%	0%	0%	0%
22 Utilities	0%	0%	0%	0%
23 Construction	16%	24%	9%	11%
31-33 Manufacturing	5%	4%	5%	5%
41 Wholesale Trade	5%	3%	6%	6%
44-45 Retail Trade	14%	15%	11%	13%
48-49 Transportation/Warehousing	4%	3%	7%	6%
51 Information and Cultural Industries	1%	1%	2%	2%
52 Finance and Insurance	3%	3%	4%	4%
53 Real Estate, Rental & Leasing	4%	4%	5%	4%
54 Professional Scientific Technical Services	9%	7%	16%	14%
55 Management of Companies	1%	1%	1%	1%
56 Administrative and Support	5%	6%	5%	5%
61 Educational Services	1%	1%	1%	1%
62 Health Care & Social Assistance	10%	8%	10%	10%
71 Arts, Entertainment & Recreation	2%	3%	1%	1%
72 Accommodation & Food Services	7%	8%	6%	7%
81 Other Services	9%	7%	9%	10%
91 Public Administration	0%	0%	0%	0%

Among businesses with employees, there again exists a high degree of similarity across the geographies profiled, with a few notable exceptions. Simcoe and Muskoka again have a much higher percentage of their employers in the Construction sector, and a much lower proportion in the Professional, Scientific & Technical Services sector, compared to both the Central Region and the province. The tourism industry in Simcoe and Muskoka is reflected in slightly higher proportions for Arts, Entertainment & Recreation; Accommodation & Food Services; and Retail Trade. On the other hand, Transportation & Warehousing represents a smaller share of employers.

SIMCOE AND MUSKOKA HAVE A MUCH HIGHER PERCENTAGE OF EMPLOYERS in the construction sector

Employment Ontario

Program Related Data
(2014-2015)

Lay-off Industry – Employed Industry

Last year, data was provided regarding the lay-off and employment outcomes of ES Assisted clients by detailed industry categories (4-digit NAICS) North American Industry Classification System. At that level of detail, the data categories bec ame much smaller and, as a consequence, any data category with less than 10 clients was surpressed, on account of confidentiality. Thus, while one got far more detailed insight regarding unemployment and employment dynamics relating to detailed industry categories, the total numbers suffered because many data cells had a "zero," when in fact that number could have been anywhere from "0" to "9."

This year, MTCU has decided to aggregate the industry data to the broad industry level (2-digit NAICS). The difference in terms of reported data is illustrated in Table 17.

Table 17: Number of clients with lay-off industry data

	SMWDB	REGION	ONTARIO
% of 2014-15 ES Assisted Clients with industry lay-off data	69%	52%	55%
% of 2013-14 ES Assisted Clients with industry lay-off data	41%	42%	45%

Table 18: Number of clients with industry employment outcome data

	SMWDB	REGION	ONTARIO
Clients with industry employment data	624	3,923	10,700
ES Assisted clients with employment outcomes	4,578	64,809	136,715
Industry employment data as % of all clients with employment data	14%	6%	8%

Making the data available at the aggregated 2-digit level appears to have increased the data which is available. That being said, the numbers for the SMWDB increased much more than at the regional or provincial levels, suggesting that better reporting may also be at play here.

However, the same cannot be said of the employment outcome data by industry. Table 17 illustrates the figures.

The data set is more limited, no doubt because clients finding employment may not check back in with the Employment Services agency. In all instances, industry employment outcome is available for less than 10% of clients with employment outcomes. The proportion oc clients for whom data was collected

at the SMWDB level (14%) is still considerably better than the figure for the region (6%), which no doubt has brought down the provincial figure (8%).

With these data limitations in mind, the following table summarizes the industry data that has been provided.

Table 19: Industry lay-off and industry employment outcomes, Board, Region and Ontario; Ontario resident employment and unemployment profile

	SMWDB		REGION		ONTARIO			
	EO lay-off industry	EO industry outcome	EO lay-off industry	EO industry outcome	EO lay-off industry	EO industry outcome	Unemployed residents	Employed residents
Accommodation & food services	18%	13%	12%	8%	14%	10%	9%	7%
Administrative and support	9%	15%	12%	14%	11%	13%		*4%*
Agriculture, forestry, fishing	1%		0%		1%	1%		*2%*
Arts, entertainment & recreation	4%	4%	3%	3%	3%	2%		*2%*
Construction	11%	9%	6%	5%	9%	8%	12%	7%
Educational services	3%	2%	4%	3%	3%	3%	6%	7%
Finance and insurance	1%	2%	3%	6%	2%	3%	4%	6%
Health care & social assistance	6%	9%	7%	10%	7%	9%	6%	12%
Information & cultural industries	1%		3%	4%	2%	2%		*3%*
Management of companies			0%		0%			*0%*
Manufacturing	12%	11%	11%	10%	13%	13%	11%	11%
Mining, quarrying, and oil & gas	1%		0%	0%	0%	1%	1%	0%
Other services	5%	4%	8%	4%	7%	5%	4%	4%
Professional, scientific technical	5%	3%	10%	7%	7%	5%	7%	8%
Public administration	1%		1%	2%	2%	2%	2%	5%
Real estate and rental & leasing	2%	2%	1%	2%	1%	1%	1%	2%
Retail trade	15%	20%	11%	14%	12%	15%	14%	12%
Transportation and warehousing	4%	4%	3%	5%	3%	5%	4%	5%
Utilities	0%		0%	1%	0%	1%		*1%*
Wholesale trade	2%	2%	3%	3%	3%	2%	3%	4%

For the EO data, where a cell has no entry, it means that there was no figure for that category. Where a cell has zero, it means that a figure exists, but due to rounding it was rounded down from under 0.5% to 0%.

Ontario employed and unemployed data is from 2014 Labour Force Survey data, EXCEPT where that data is unavailable under the Labour Force Survey, in which case the percentage is derived from the 2011 National Household Survey, in which case the number is italics, and the data is only available for employed residents.

The big picture story is fairly straight-forward. There is considerable reliance in terms of employment outcomes on a few industries which they themselves have a higher proportion of the unemployed and usually a higher proportion of the employed: Accommodation & food services; Administrative & support services; Construction; Manufacturing; Health care and social assistance; and Retail trade.

Two sectors in the SMWDB area account for a significant proportion of employment outcomes, in excess of their share of lay-offs and of employment at the provincial level. These are:

- Administrative and Support Services (includes temp agencies, janitorial services; landscaping services; security firms)
- Retail Trade

The lay-off and employment outcome data for occupations has also been aggregated from last year's 4-digit NOC (National Occupational Classification) to this year's 2-digit NOC (except for manager occupations, which are at the 3-digit NOC level). Tables 20 and 21 provide this data.

Table 20: Top 10 occupations for lay-offs

SMWDB	REGION	ONTARIO
1. Service support occupations (525)	1. Customer and personal services occupations (4508)	1. Service support occupations (11049)
2. Trades helpers, construction labourers (328)	2. Service support occupations (4230)	2. Customer and personal services occupations (9182)
3. Customer and personal services occupations (317)	3. Administrative supervisors and administrative occupations (3624)	3. Labourers in manufacturing (6575)
4. Salespersons - wholesale and retail (291)	4. Office support occupations (3201)	4. Trades helpers, construction labourers (6506)
5. Service supervisors (288)	5. Salespersons - wholesale and retail (2811)	5. Administrative supervisors and administrative occupations (6201)
6. Labourers in manufacturing (240)	6. Service supervisors (2346)	6. Service supervisors (6056)
7. Sales support occupations (237)	7. Sales support occupations (2202)	7. Salespersons - wholesale and retail (5926)
8. Administrative supervisors and administrative occupations (226)	8. Labourers in manufacturing (2175)	8. Office support occupations (5732)
9. Industrial, electrical and construction trades (171)	9. Paraprofessionals in legal, social, community and education (1613)	9. Sales support occupations (5258)
10. Transport and heavy equipment operators (165)	10. Industrial, electrical and construction trades (1561)	10. Industrial, electrical and construction trades (4915)

Table 21: Top 10 occupations for employment outcomes

SMWDB	REGION	ONTARIO
1. Salespersons - wholesale and retail (64)	1. Customer and personal services occupations (465)	1. Customer and personal services occupations (1103)
2. Customer and personal services occupations (63)	2. Administrative supervisors and administrative occupations (293)	2. Service support occupations (807)
3. Service support occupations (58)	3. Salespersons - wholesale and retail (291)	3. Labourers in manufacturing (797)
4. Trades helpers, construction labourers (44)	4. Service support occupations (256)	4. Salespersons - wholesale and retail (681)
5. Sales support occupations (38)	5. Office support occupations (248)	5. Sales support occupations (591)
6. Labourers in manufacturing (38)	6. Labourers in manufacturing (208)	6. Office support occupations (587)
7. Office support occupations (32)	7. Sales support occupations (189)	7. Administrative supervisors and administrative occupations (547)
8. Transport and heavy equipment operators (31)	8. Paraprofessionals in legal, social, community and education (123)	8. Trades helpers, construction labourers (522)
9. Administrative supervisors and administrative occupations (28)	9. Technical occupations in natural and applied sciences (122)	9. Transport and heavy equipment operators (431)
10. Care providers and other support occupations (28)	10. Professional occupations in natural and applied sciences (118)	10. Industrial, electrical and construction trades (426)

Administrative supervisors and administrative occupations (full title: Administrative and financial supervisors and administrative occupations) include: administrative services supervisors, office administrative assistants

Customer and personal services occupations (full title: Service representatives and other customer and personal services occupations) include: food and beverage servers, hotel front desk clerks, security guards, customer service clerks

Service supervisors (full title: Service supervisors and specialized service occupations) include: service supervisors, chefs and cooks

Service support occupations (full title: Service support and other service occupations, n.e.c.) include: food counter attendants and cleaners

There are eight occupations in top ten that are common to all areas, although they may rank slightly differently by area. These eight occupations (full titles) are:

- Administrative and financial supervisors and administrative occupations
- Industrial, electrical and construction trades
- Labourers in processing, manufacturing and utilities
- Sales representatives and salespersons - wholesale and retail trade
- Sales support occupations
- Service representatives and other customer and personal services occupations
- Service supervisors and specialized service occupations
- Service support and other service occupations, n.e.c. (not elsewhere classified)

One of the top ten lay-off occupations in the local area is also shared with the region:

- Trades helpers, construction labourers and related occupations

And one of the top ten lay-off occupations in the local area is unique to the local area (as far as making the top ten list):

- Transport and heavy equipment operation and related maintenance occupations

There is one occupation that made the top ten for each of the region and the province, but not the local area, namely:

- Office support occupations

And one occupation made the top ten for the region but not the local area (or the province):

- Paraprofessional occupations in legal, social, community and education services

When it comes to employment outcomes by occupation, the available data at the local level is more limited, with only 19 occupations listed for employment outcomes (occupations with less than 10 entries are suppressed). Nevertheless, there is enough data to make some comparisons.

Even though there is such limited data at the local level, there still exists a fair degree of commonality among the top ten lists for the three areas, with seven occupations making all lists:

- Service representatives and other customer and personal services occupations
- Administrative and financial supervisors and administrative occupations
- Sales representatives and salespersons - wholesale and retail trade
- Office support occupations
- Sales support occupations
- Service support and other service occupations, n.e.c.
- Labourers in processing, manufacturing and utilities

It is noteworthy that of the top ten lay-off occupations, eight make the list for the top ten employment outcome occupations at the local level.

Of the top ten lay-off occupations, eight make the list for the top ten employment outcome occupations at the local level.

Findings

from Employer Survey

Over the course of two weeks in September, SMWDB administered an on-line survey to employers to obtain their views on a number of labour market challenges. The dissemination of this survey was greatly assisted by approximately 30 community partners, representing municipalities, chambers of commerce, employment services agencies, educators and various non-profit organizations. In total, 235 employers went to the on-line survey and slightly under 200 provided substantive answers, with 170 completing the survey.

The distribution of employers by industry provided a good mix of different types of businesses, in many cases reflecting the actual distribution of these businesses in Simcoe and Muskoka. Table 1 provides the actual number of responses by industry, the percentage distribution of survey responses by industry, and compares them to the distribution of establishments with one or more employees in Simcoe and Muskoka in June 2015.

Table 1: Distribution of survey respondents by industry compared to actual distribution of establishments with employees in Simcoe and Muskoka

	SURVEY		ACTUAL
Industry sector	**#**	**%**	
Accommodation and Food Services	17	8.6%	7.2%
Administrative & Support, Waste Management	1	0.5%	5.3%
Agriculture, Forestry, Fishing and Hunting	3	1.5%	2.3%
Arts, Entertainment and Recreation	5	2.5%	1.9%
Construction	27	13.7%	17.5%
Educational Services	13	6.6%	1.0%
Finance and Insurance	8	4.1%	3.4%
Health Care and Social Assistance	15	7.6%	9.8%
Information and Cultural Industries	1	0.5%	1.1%
Management of Companies and Enterprises	2	1.0%	0.7%
Manufacturing	22	11.2%	4.7%
Mining and Oil & Gas Extraction	0	0.0%	0.4%
Other Services (except Public Administration)	25	12.7%	8.9%
Professional, Scientific & Technical Services	19	9.6%	9.0%
Public Administration	10	5.1%	0.2%
Real Estate and Rental and Leasing	2	1.0%	3.7%
Retail Trade	16	8.1%	14.5%
Transportation and Warehousing	5	2.5%	3.8%
Utilities	4	2.0%	0.2%
Wholesale Trade	2	1.0%	4.5%
TOTAL	197	100%	100%

In a few instances, there is an over-representation of employers, notably Educational Services, Manufacturing, and Public Administration. Similarly, certain sectors are under-represented: Administrative & Support, Waste Management; and Retail Trade.

The responses came from across the target area:

Table 2: Survey respondents by location

Location	#	%
Orillia	50	20%
Barrie	39	16%
Other	24	10%
Midland/Penetanguishene	23	9%
Collingwood	19	8%
Bracebridge	18	7%
Other location in Muskoka	14	6%
Gravenhurst	10	4%
Huntsville	10	4%
Innisfil	8	3%
Oro-Medonte	7	3%
Other location in Simcoe	7	3%
New Tecumseth	6	2%
Springwater	5	2%
Wasaga Beach	3	1%
Essa	2	1%
192 Respondents – 245 answers	245	100%

The total number of responses is greater than the number of employers who completed the survey because some employers provided more than one location. There is an over-representation of responses from Orillia and an under-representation from Barrie: Orillia's employed labour force represents around 6% of the employed labour force of the SMWDB area's labour force, while the City of Barrie accounts for around 30%.

One further comparison for assessing the representativeness of the survey population is to compare the distribution of respondents by number of employees to the actual figures.

Table 3: Distribution of survey respondents by number of employees

	NUMBER OF EMPLOYEES			
	1-4	5-19	20-99	100+
Actual number	8,053	5,300	1,593	265
Actual percent	53%	35%	11%	2%
Survey number	41	70	44	38
Survey percent	21%	36%	23%	20%
Survey as percent of actual	**0.5%**	**1.3%**	**2.8%**	**14.3%**

Table 3 illustrates the distribution of all businesses with employees by number of employees (that is, the very large proportion of businesses with no employees, solo operators, is excluded from this calculation).[1] By far, the survey is over-represented by employers with a greater number of employees, and under-represented by firms with very few employees. For an understanding of local labour market dynamics, this is not a bad thing. Indeed, the 38 survey respondents with more than 100 employees represent 14.3% of all employers in Simcoe and Muskoka with over 100 employees (265 such businesses). This is a very high survey response rate for this employment-rich category of employers.

Factors Driving Business Decisions

This year, the survey sought to understand the characteristics of employers by focusing on the factors that affect their business decisions. This was done by way of the following question:

We wish to understand the factors that influence your business decisions. How would you rank the following factors when it comes to influencing your hiring decisions?

These factors were the following (the factors are listed in full, as they appeared in the survey, and their abbreviated form for the sake of reporting is listed in the second column): Respondents were asked to rank each of these seven factors from most important to last. In order to arrive at a composite score that would make comparisons easier, each ranking for 1st spot received a score of “7”, each ranking at 2nd spot received a score of “6” and so on down the list until the 7th place ranking and a score of “1”.

WORDING IN SURVEY	ABBREVIATED FORM
Promoting innovation and/or research	Innovation
Seeking to deliver a quality product or service	Quality
Keeping costs under control	Costs
Accommodating growth/expansion	Growth
Ensuring customer satisfaction and good customer service	Customer
Being a socially responsible organization	Socially responsible
Feeding our talent pipeline for the future	Talent

[1] In the case of the survey, the figure represents Full Time Equivalent employees. The number of actual employers comes from Statistics Canada, Canadian Business Counts, June 2015.

able 4 lists these cumulative scores, as well as the percentage of 1st place ranking each factor received. The list is in order of top score.

By a considerable margin, two factors scored at the top, namely:

- Ensuring customer satisfaction and good customer service; and
- Seeking to deliver a quality product or service

A more distant third was:

- Keeping costs under control

There followed a cluster of lower ranking factors, as follows:

- Promoting innovation and/or research;
- Feeding our talent pipeline for the future; and
- Accommodating growth/expansion.

In last place was:

- Being a socially responsible organization.

Among some correlations, the most prominent one was between COSTS and TALENT:

- For those respondents for whom COST was an important consideration (ranked 1st, 2nd or 3rd), TALENT was ranked lower (composite score of 3.49);
- For those respondents for whom COST was less important (ranked 5th, 6th or 7th), TALENT was ranked higher (composite score of 4.70).

Table 4: Scoring regarding importance of select factors in business decisions

FACTOR	CUMULATIVE SCORE	PERCENT 1st PLACE
Customer	6.06	40%
Quality	5.99	32%
Costs	4.60	9%
Innovation	4.17	3%
Talent	4.10	6%
Growth	4.09	9%
Socially responsible	3.66	2%

Comparison of Graduates From Community Colleges and Universities

Respondents were asked to compare community college diploma graduates with university Bachelor degree graduates on a range of work-relevant abilities. For each item, employers were given a range of possible assessments which are listed below together with the rating assigned for scoring purposes.

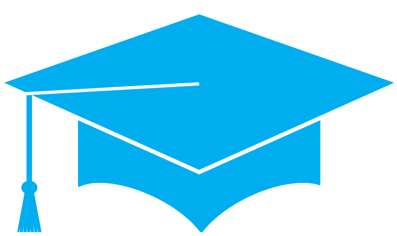
College grads much better prepared ...."+2" for college
College grads somewhat better prepared ...."+1" for college
Both equally prepared ...."0"
University Bach. grads somewhat better prepared ...."+1" for university
University Bach. grads much better prepared ...."+2" for university

The table below lists the abbreviated form for each statement.

Short version	Option in survey
Technical skills	Work-related technical skills
Workplace familiarity	Familiarity with workplace and work expectations
Communication skills	Communication skills
Problem-solving	Analytical and problem-solving skills
Teamwork	Interpersonal and teamwork skills
Motivation	Motivation and initiative
Career potential	Potential for career advancement
Leader potential	Potential for leadership role

The first point to make is that many employers rate community college and university bachelor grads equally – on each of these abilities, anywhere from slightly over a third to almost two-thirds state that both are equally prepared.

That being said, the results do reveal a consistent set of perceptions: community college grads are seen as being somewhat better prepared for the workplace (technical skills, workplace familiarity), and university students score slightly better on soft skills and potential for advancement and leadership. When it comes to interpersonal skills and teamwork, as well as motivation, the two are scored almost equally, with a very slight edge to community college grads on interpersonal skills and teamwork.



Community College Grads are seen as being **somewhat better prepared for the workplace**

Table 5: Preparedness of candidates by educational background

	College better prepared	Both the same	Bachelor better prepared
Technical skills	50%	39%	11%
Workplace familiarity	39%	49%	12%
Communication skills	11%	49%	40%
Problem-solving	11%	47%	42%
Teamwork	24%	65%	11%
Motivation	16%	65%	19%
Career potential	12%	45%	43%
Leader potential	11%	38%	51%

There are only a few instances where the percentage of respondents choosing "much better prepared" is particularly high. Among those who provided a rating:

- 25% felt university Bachelor grads were much better prepared in terms of leadership potential;
- 22% felt community college grads were much better prepared in terms of work-related technical skills;
- 18% felt university Bachelor grads were much better prepared in terms of analytical and problem-solving skills;
- 18% felt university Bachelor grads were much better prepared in terms of potential for career advancement;
- 17% felt community college grads were much better prepared in terms of familiarity with workplace and work expectations.

Most Frequently Hired Occupations

Respondents were asked to indicate the occupations for which they hired the most number of individuals over the last 12 months, limiting their list to three occupations. 178 employers listed at least one occupation, 156 employers listed a second occupation and 122 listed a third occupation.

What is noteworthy is a very great variety of occupations cited, driving home the point that the employment needs of employers are unique to that business. Granted, a number of occupations can be identified by several different titles (for example, "housekeeper" or "room attendant"). But even after spending some time collapsing similar occupations into one heading, there still were approximately 100 distinct occupations that were named in the first list.

Even though respondents were asked to be as specific as possible in naming the occupation, some of the responses provided limited insight, with answers such as "part-time" or "assistant." That being said, there were several occupations which attracted frequent mention:

- Sales and customer service representative (12 respondents)
- General labourer (23)
- Housekeeping (7)
- Registered nurse (6)
- Truck driver (5)
- Driver (5)
- Administrative assistant/clerical (5)
- Personal support worker (4)
- Production worker (4)
- Automotive technician or mechanic (4)

It is noteworthy that when one got to the second and third list of occupations, the range of occupations widened, while on the other hand one occupation stood out for frequency of mention, namely administrative support staff, being cited 13 times on the second list and 12 times on the third list.

Even though the high frequency hires occur primarily among entry-level occupations, there are exceptions. Six employers cited "registered nurse" for mention. There were a number of mentions made of occupations related to electrical functions: electrical apprentice (twice), electrician, senior level electrician, electrical engineers, electrical technician, and electrical technologist. Engineering received similar attention: engineer (three mentions), mechanical engineering, engineering designer, engineering technologist, graduate engineers and co-op students. And scattered throughout the list were various other high skilled occupations, such as teachers, social workers, accountant, architect and professor.

Several different skilled trades were cited: carpenter (2); HVAC technician; welder (2); plumber; and stone mason; and tool and die apprentice.

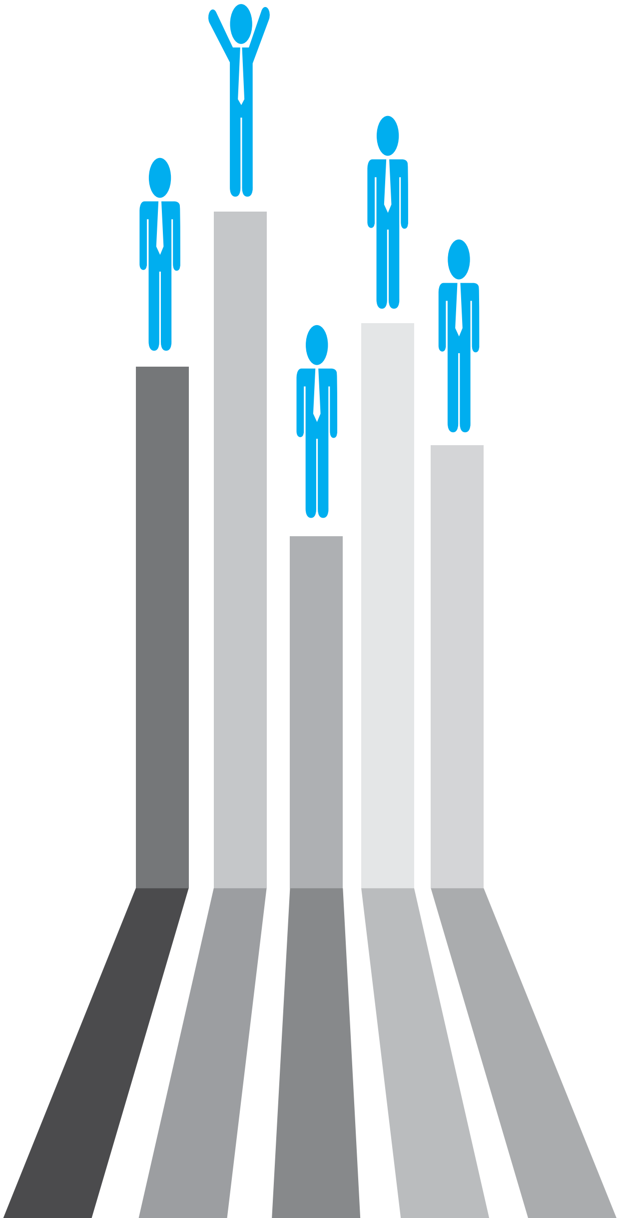
Most Difficult To Fill Occupations

Respondents were further asked to name the occupations they found most difficult to fill. Once again, employers were asked to limit their responses to three occupations, 154 named at least one occupation; of those, 112 cited two and 88 cited three occupations, indicating that employers have considerable difficulty hiring for certain occupations.

As in the case of the frequent hire occupations, the list of distinct occupations is extensive with only a few occupations getting multiple responses. In fact, the occupation with the most mentions is housekeeping, at six (6).

What is more apparent from the difficult to hire list is the qualification often attached to an occupation: experienced, reliable, qualified are adjectives that are added to the occupation, indicating a specific skill level or demonstrated ability.

As well, more of the occupations cited in the difficult to hire category involve a higher level of skills: the range of occupations under the title of electrician or electrical engineer, as well as engineers generally (cited 5 times); managers of various sorts are named a few times, and specifically project managers (3); sales positions get mentioned often, including more specific titles, such as sales professionals with industry knowledge, technical sales, sales skills; skilled trades of various sorts; and specific designations, such as Master's level registered nurse and Master of Social Work.



Availability Of Qualified Workers

Employers have a lukewarm assessment of the availability of qualified workers in their local area. Respondents were asked to assess the availability of qualified workers as excellent, good, fair or poor. 71% of all respondents rated their availability as fair or poor. If one assigned a numerical value to each choice, where "3" = Excellent, "2" = Good, "1" = Fair, and "0" = Poor, and totaled the score and divided by the total number of responses, the average rating would be 1.06, essential the value assigned to Fair (1.0).

There are variations. Chart 1 compares the results for all respondents, and then provides the breakdown by different size of company.

Clearly, smaller firms find greater frustration with the availability of qualified job candidates in their local area: 80% of firms with 1 to 4 employees rated their availability as fair or poor, compared to 63% for firms with 100 or more employees, which itself is still a low score.

There are also significant differences by geography. Chart 2 provides the results for Barrie, Orillia, Muskoka and all respondents other than those in Barrie or Orillia.

Muskoka employers in particular had a low assessment of the availability of qualified workers locally, with 87% answering fair or poor. On the other hand, 38% of Barrie employers scored the availability as either excellent or good.

Reasons for external recruitment

This question focused on the reasons why employers would recruit outside of their organizations to fill gaps in their workforce. The following table provides the list of statements about which employers were asked to indicate their level of agreement or disagreement.

Chart 1: Assessment of availability of qualified workers in the local area, by size of company

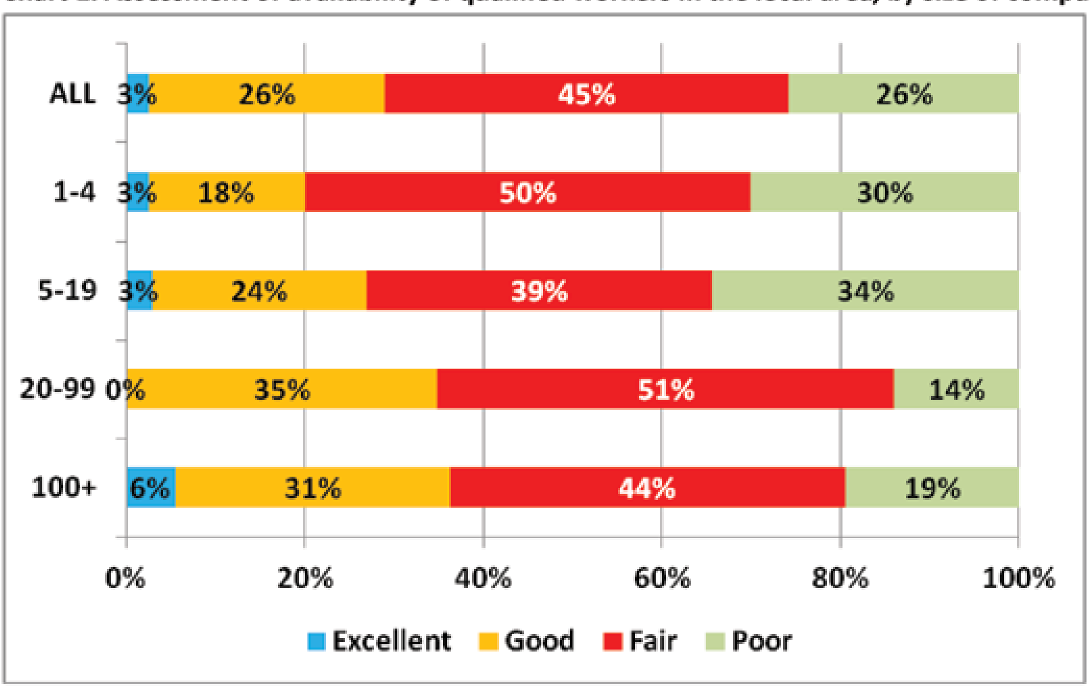
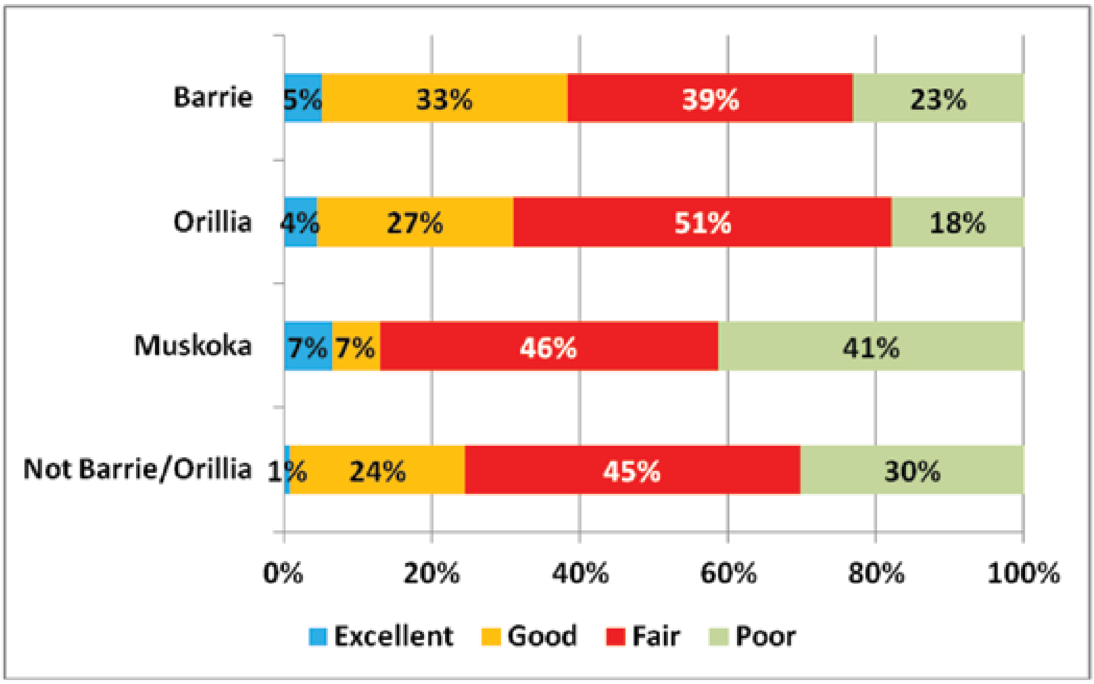


Chart 2: Assessment of availability of qualified workers in the local area, geography



Short version	Statement in survey
Technical expertise	To gain a particular technical expertise
Managerial expertise	To gain managerial expertise
No one groomed	No one has been groomed internally for the position
Add skill depth	To add to the depth of skills among our workforce
Increase diversity	To increase the diversity of our workforce
Redirect firm culture	To redirect our organizational culture
Bring in maturity	To bring maturity and experience into our workforce
Bring in youth	To bring youth and energy into our workforce

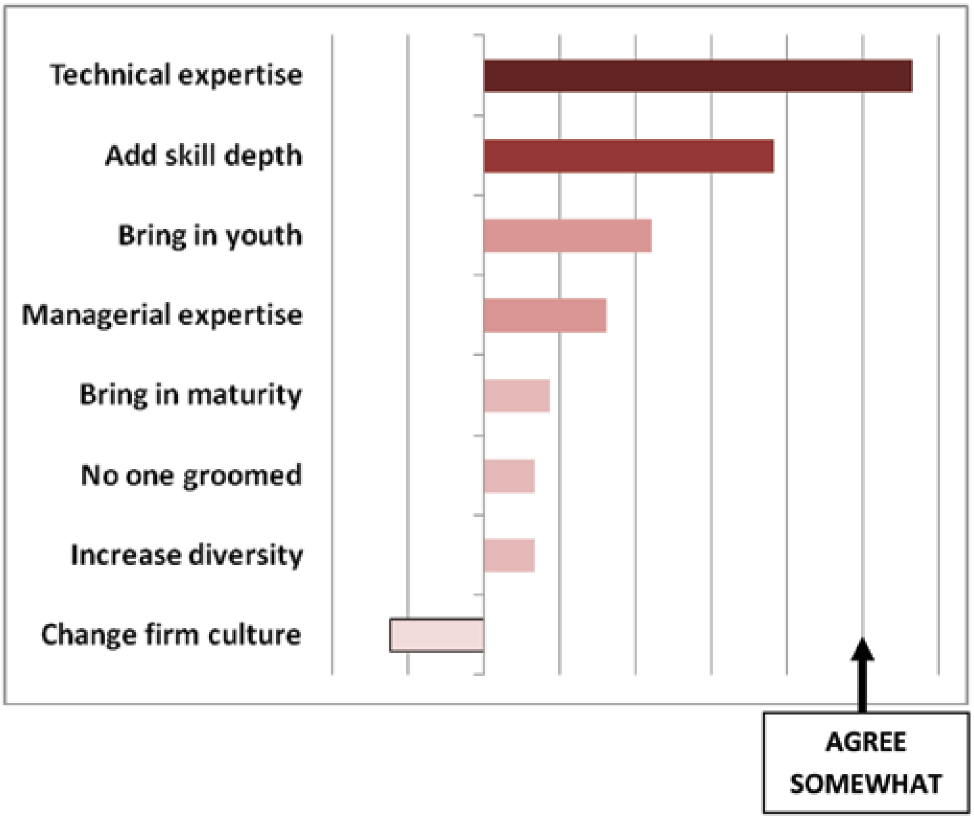
To produce a composite score to compare answers, a value is assigned to each response:

Disagree strongly	-2
Disagree somewhat	-1
Agree somewhat	+1
Agree strongly	+2

The most prominent reason why employers go outside the firm to hire is to bring in a particular expertise, or to add depth to the skills among their workforce. In short, it is to bring in skills.

The general trend in these responses is that greater importance is attached to each of these factors the larger the firm – which makes sense, as larger firms will usually be hiring more often. The exception is in relation to item "No one has been groomed internally for the position" – in this case, the larger the firm; the less likely this is a reason for hiring. Again, this makes sense because the larger the firm, the more likely it is possible to draw on the existing workforce for advancement.

Chart 3: Reasons for external recruitment



When the results are analyzed according to the business factors which drive hiring decisions, there are some differences:

	More likely to score this reason higher
Managerial expertise	Firms where COST is important Firms where GROWTH is NOT important
No one groomed	Firms where TALENT is NOT important
Add skill depth	Firms where TALENT is important
Increase diversity	Firms where TALENT is important
Bring in youth	Firms where COST is important Firms where GROWTH is important

Recruitment Strategies: Frequency and Satisfaction

Employers were asked how they recruited for new employees, as well as how satisfied they were with the various recruitment strategies.

Table 6 lists the frequency with which employers said they used the listed recruitment strategies. A composite score was created to compare the results, where each “Always” answer was scored a “3”, each ”Sometimes” was a “2,” and each “Rarely” a “1;” an answer of “Never” got “0.” The addition of all these scores was divided by all the responses to arrive at an average response. The responses are also illustrated by way of a chart (Chart 4).

Table 6: Frequency of use of various recruitment strategies (from highest to lowest)

	ALWAYS	SOMETIMES	RARELY	NEVER	RATING
Word of mouth	51%	41%	6%	2%	2.40
On-line job boards	46%	34%	7%	14%	2.11
Employee recommendations	23%	62%	12%	4%	2.04
Company website	48%	18%	8%	27%	1.87
Internal postings	45%	19%	10%	27%	1.81
Walk-ins or inquiries	16%	40%	32%	13%	1.58
Newspaper ads	20%	30%	22%	28%	1.41
Social media (e.g. LinkedIn)	16%	31%	14%	39%	1.23
Non-profit community agencies	15%	23%	15%	46%	1.08
Job fairs	8%	19%	21%	52%	0.83
Private temp agencies	3%	20%	24%	53%	0.74
Job Central	3%	11%	16%	69%	0.48

Word-of-mouth remains the recruitment method most relied upon by employers, with half saying they use it always. A close second is on-line job boards, where almost half use it as well, the main difference being the proportion who never use these methods: a paltry 2% for word-of-mouth, 14% for on-line job boards.

At the other extreme, roughly half or more employers do not use non-profit community agencies, job fairs, private temp agencies or Job Central (a recent job board initiative undertaken by the SMWDB – www.jobcentralsm.ca).

Table 7 lists the level of satisfaction employers expressed with these different recruitment strategies. Once again, a composite score was created, with “Very satisfied” receiving a “2,” “Satisfied” a “1,” and “Not satisfied” a “-1.” These responses are also illustrated on Chart 4.

The strategies for recruitment that employers are most satisfied with all involve the immediate social network of the firm: employee recommendations, internal postings and word of mouth. The recently launched Job Central garnered a very respectable 6th place ranking on a product launched mere months prior to the survey. The mechanisms that attract the least satisfaction are newspaper ads, walk-ins and job fairs.

Table 7: Satisfaction with various recruitment strategies (from highest to lowest)

	VERY SATISFIED	SATISFIED	NOT SATISFIED	RATING
Employee recommendations	15%	77%	8%	0.99
Internal postings	17%	69%	14%	0.90
Word of mouth	17%	68%	15%	0.86
Company website	20%	60%	20%	0.80
On-line job boards	11%	66%	23%	0.65
Job Central	15%	59%	26%	0.63
Non-profit community agencies	19%	52%	29%	0.62
Private temp agencies	10%	62%	28%	0.53
Social media (e.g. LinkedIn)	8%	60%	32%	0.45
Job fairs	11%	51%	38%	0.35
Walk-ins or inquiries	4%	57%	39%	0.27
Newspaper ads	9%	38%	52%	0.05

Chart 4: Frequency of use and satisfaction with various recruitment strategies

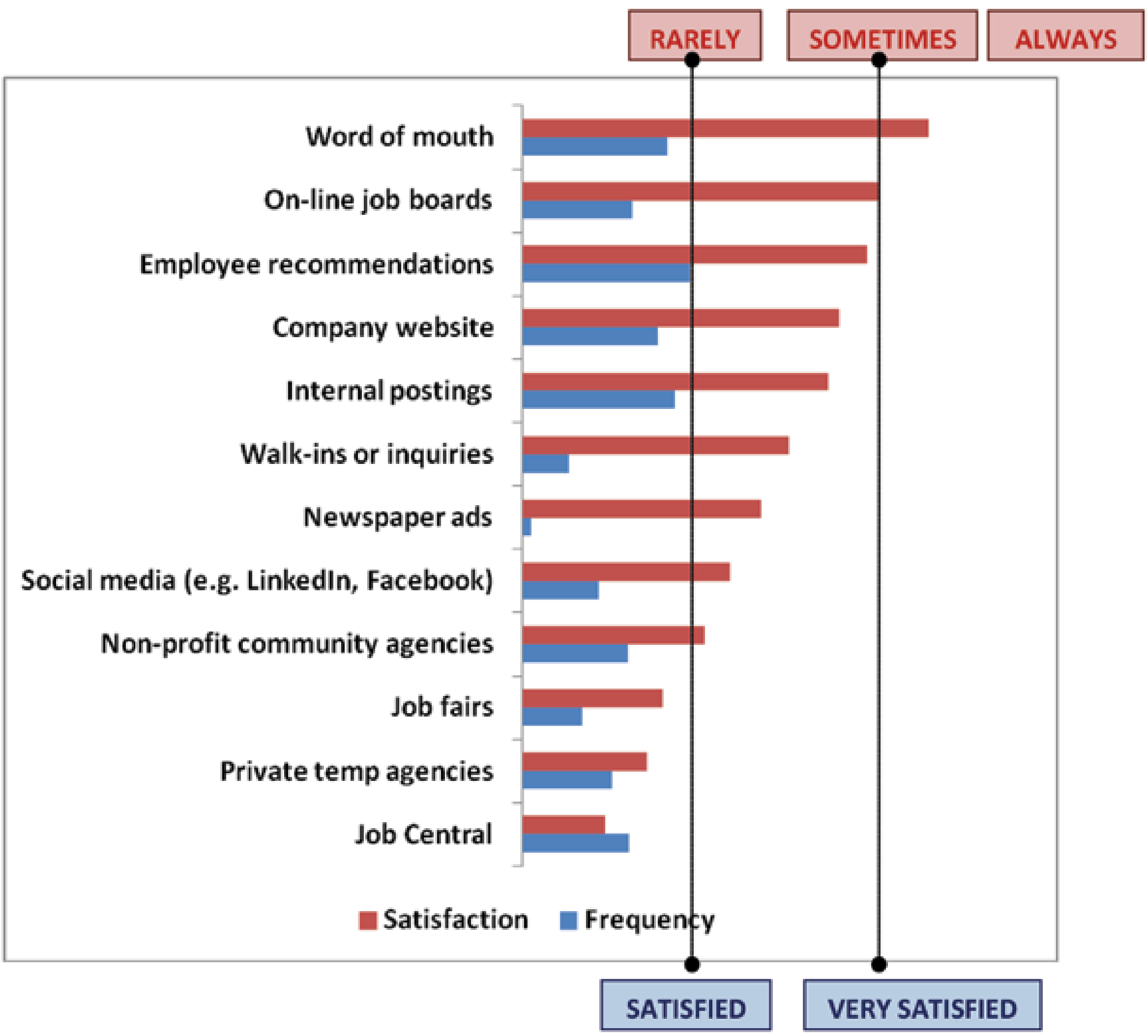


Chart 4 highlights that frequency of use and satisfaction do not always correspond. They do correspond in the case of employee recommendations, internal postings and word of mouth (both high frequency and high satisfaction). Yet newspaper ads have a medium level of use, but the lowest satisfaction rating. On the other hand, Job Central and non-profit community agencies have a lower level of use, but a mid-range score when it comes to satisfaction.

Issues Affecting Recruitment

Respondents were asked to rate the extent to which various issues were a frequent concern when it came to the recruitment of job candidates.

The options as presented in the survey are listed below, together with the shortened version used in Chart 5 to illustrate the results:

Short version	Option in survey
Lack education	Applicants not meeting educational qualification requirements
Lack experience	Applicants not meeting work experience requirements
Lack skills	Applicants not meeting technical skills requirements
Lack motivation	Applicants not meeting motivation, attitude, or interpersonal skills requirements
Work barriers	Inability to compete with other employers due to nature of work (seasonal, shift work, irregular hours, job content)
Pay barriers	Inability to compete with other employers due to pay and benefits
Travel barriers	Inability to compete with other employers due to remote location / poor public transit
Conversational Eng	Applicants' ability to converse in everyday conversational English
Assess past work	Ability to assess an applicant’s previous work experience
Cdn business culture	Applicants’ familiarity with Canadian business culture, practices
Higher functioning Eng	Applicants' ability to converse at a higher functioning English
English writing	Applicants’ English writing skills
Assessing education	Assessing applicants’ educational credentials
Credential recognition	Getting recognition of applicants’ professional designations
Promotion barriers	Inability to compete with other employers due to lack of career advancement opportunities

Each response has been scored the following way:

Almost never a concern	"0"
Sometimes a concern	"1"
Often a concern	"2"
Almost always a concern	"3"

Chart 5: Frequency of concerns arising during recruitment process

The two most prominent concerns that employers find during the recruitment process are:

- Applicants are not meeting the work experience requirements
- Applicants are not meeting motivation, attitude, or interpersonal skills requirements

The third concern is that applicants are not meeting the technical skills requirements for the position.

Low on the list are concerns that typically attach to newcomers:

- Applicants' familiarity with Canadian business culture, practices
- Applicants' ability to converse in everyday conversational English
- Getting recognition of applicants' professional designations

Scoring slightly higher are two other language-related issues, which may suggest that non-immigrant candidates are also scoring lower in terms of these attributes, namely:

- Applicants' ability to converse at a higher functioning English
- Applicants' English writing skills

2 most prominent concerns that employers find during the recruitment process are

Applicants are not meeting the work experience requirements

Applicants are not meeting motivation, attitude, or interpersonal skills requirements

2015 -2016
Action Plan Update

Employer Council

SMWDB is working with the Economic Development Office at the County of Simcoe who is currently undergoing significant staffing upgrades and working with County Council in the development of an Economic Sub-Council. These partners will be part of the discussion of moving forward with the LMP report to be enhanced by the County of Simcoe and the development of an Employers Council will be included as part of that. Discussions are underway in terms of what that role each organization will play and what the structure of the Employer Council will look like.

Breakfast and Learn

The Breakfast and Learn Simulcast topic this year is employers investing in their employees and ensuring that they are strategic in terms of staff retention.
Georgian College has agreed to partner again this year and simulcast to five of their campuses.
Currently under discussion:

- Speaker recommendations
- Panel topics
- Feedback on live streaming the event
- Marketing

Data Council

A committee has been struck and met several times to decide the first logical and inclusive steps to take to determine what is currently being done in our region in terms of data and how that could be improved. A consultant (Robert Wong) was brought in to give a presentation of the research he conducted for RTO7 (Regional Tourism Organization 7) and discuss how this could be rolled out to include multiple sectors. The committee decided to undergo a survey to conduct the same type of research in our region but for a broader stakeholder base. Timelines and specific tasks are to be determined but will likely include:

- Who are the stakeholders and how many
- When are you surveying, if you are
- What are the needs of the stakeholders
- Why do they need data
- A survey to be created and disseminated

Mental Health 101

This workshop was on helping clients with mental health issues to learn about types of mental illness, facts, myths and other un-truths was held on June 15, 2015. Sixty nine people were in attendance at Liberty North in Barrie. SMWDB had to secure a larger room and keep a wait list to accommodate the unexpected high number of people wishing to attend. These included Employment Services, Literacy and Ontario Works staff, amongst others.
The day was very successful with great lunch and sharing of resources. Participant feedback was also very good. 80% of attendees rated it a 4/5 or 5/5.
The main presenter was David Oddie from Centre for Addiction and Mental Health. SMWDB also had guest speaker Gina Frederick from local CMHA (Canadian Mental Heath Association).

Soft Skills Solutions

The project will determine the feasibility of credentialing the "Soft Skills Solutions" training that was developed last year along with the design of a strategic and official communication strategy. The project will also support the 'train the trainer' and organizations in adapting the curriculum to meet specialized client needs. SSS was presented to Futures/First Work Conference - to 80 attendees on Oct. 6 with very positive feedback. Further consultation with SSS committee on training manuals, train the trainer, and training to roll out to communities is underway.

Virtual Job Fair

A virtual job fair for Simcoe and Muskoka is being developed to support job seekers who may have transportation issues around attending regular fairs. It will also allow employers to remain in their workplace but still engage with potential job seekers. The fair will be held on February 4th, 2016. The fair is being developed as a package so that other organizations can carry it on at future dates if they see continued value for our region.

Watch for Our Upcoming Events and Training!

Online Job Fair

The Online Job Fair is taking place on February 4th, 2016. This free hiring event is great opportunity for employers to discover local talent while exploring new recruitment technologies. For job seekers, it's a chance to find your next great opportunity, all without leaving your computer. Check in the upcoming months for details at www.smwdb.com or at www.jobcentralsm.ca.

Soft Skills Solutions

Soft Skills Solutions to be available in 2016! This all-new employability skills training is free for job seekers to upgrade the skills that employers have been asking for. Check out www.smwdb.com for updates.

Breakfast and Learn Part 2

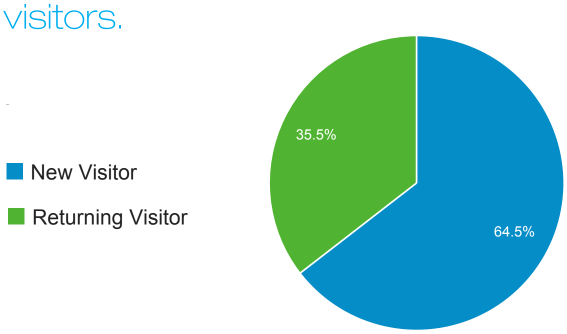
Back this year our Breakfast and Learn theme will be Employers Investing in Your Employees. The event will be simulcast from five Georgian College campuses in Simcoe and Muskoka. Stay tuned for the date, time and further details in the coming months.

Job Central

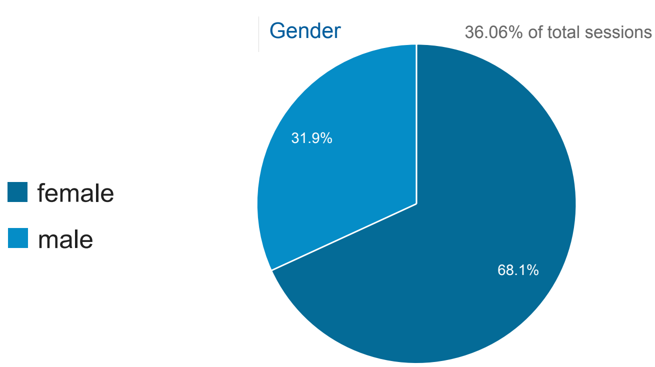
Simcoe Muskoka

The locations from which Job Central is being accessed is world-wide: 1st Canada, 2nd US, 3rd not set, 4th China, 5th Japan and also places such as Brazil, Germany, South Korea, United Kingdom and France. Job Central is being accessed through the following channels: Direct login 50%, Referral 29%; Organic search 18%, Social media 4% and via email 2%.
The most popular way to view Job Central is by desktop 87%, then mobile device 11% with tablets being last at 3%.

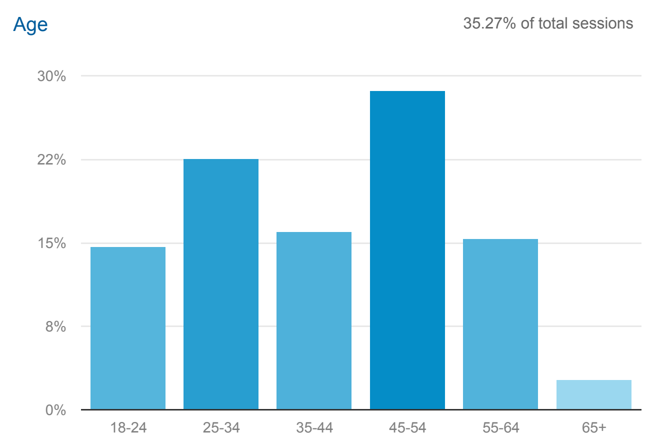
Since inception mid-May 2015 Job Central has had 5,963 sessions with 4,180 users; with 30% being returning visitors.



There are more female visitors than male; with 32% males and 68% female.



The 45-54 age group are the top users at 28%, followed by the 25-33 year old at 22%.



www.jobcentralsm.ca

2015- 2017

Action Plan Update

The County of Simcoe Economic Development department has taken on the expansion of the LMP Action Plan to ensure the current relevancy and on-going attention of the action items. They are working on re-packaging Phase 1 and Phase 2 and plan to move the LMP projects forward. The priority will be addressing the skills shortage in manufacturing.

Priority #1 “Foster employer investment in on-the-job training and skills development in employees.” i.e.:

- SMWDB is working on a Breakfast and Learn simulcast which highlights employer benefits in in investment in employee training
- Canada-Ontario Job Grant (the Job Grant) provides an opportunity for employers to invest in their workforce, with help from the government. The Job Grant will provide direct financial support to individual employers who wish to purchase training for their employees. It will be available to small, medium and large businesses with a plan to deliver short-term training to existing and new employees, and will:
    - Provide up to $10,000 in government support per person for training costs.
    - Require employers to contribute one-third of the total costs. There will be additional flexibility for small businesses to provide an in-kind contribution towards their share of the costs.
    - Require training to be delivered by an eligible, third-party trainer.

If you’re an employer with a particular skills demand, the Canada-Ontario Job Grant might be right for you.

Priority #2 “Foster partnerships between education and business” i.e.:

- SMWDB is looking at the development of a series of videos promoting and create awareness of the value of students looking at Skill Trades as a career.

Priority #3 “Enhance Simcoe County and the District of Muskoka’s transportation network to facilitate worker mobility across the region.” i.e.:

- SMWDB has embedded transportation information and links into Job Central Simcoe Muskoka.
- SMWDB is offering a Online Fair for the first time in our Region to engage job seekers who may have transportation issues around attending events in person.
- SMWDB in partnership with Georgian College is offering a Break and Learn across five campuses to ensure employers are not excluded due to distance. SMWDB is looking at offering a live cast as well.

Priority #4 “Advance Economic Development Initiatives to create and sustain local jobs.” i.e.:

- SMWDB and the County of Simcoe are partnering on an Employer Council development strategy as an on-going development of the LMP Project. Both partners are looking to more effectively engage employers in their knowledge base and decision making processes.
- The County economic Development Department continues to work with SMWDB to promote Job Central Simcoe Muskoka as a tool for employers to expand their skills search and for job seekers to find meaningful employment.

Priority #5 "Work to align the expectations of job seekers with local employers with respect to wages and compensation." i.e.:

- SMWDB is working on a Breakfast and Learn simulcast which highlights employer benefits in in investment in employee training

Priority #6

1. "Facilitate employment transition support for local job seekers facing barriers to employment with individualized supports and attention for job seeker development and job coaching."

2. "Increase awareness of available employment supports and programs."

3. "Improve collaboration among local employment service providers to effectively engage with local employers." i.e.:

- SMWDB continues to work on Soft Skills Solutions to both empower job seekers with a positive CV inclusion and employers who will be assured that job applicants have a well-rounded understanding of employability skills.

Priority #7 "Strengthen local employers' success in recruiting and retaining suitable employees." i.e.:

- SMWDB continues to promote and upgrade Job Central to give employers a broad audience for their postings.

- SMWDB is offering a 4th in a series of Employer Lunch and Learns, this one to be based on "Investing in Your Employees".

Priority #8 "Improve information about the local labour market." i.e.:

- SMWDB introduced an employer survey and just completed the 2nd year. Information secured is included in this publication.

- SMWDB is also working on a Data Council project to determine what the data needs of our region include

maximizing career potential

Simcoe Muskoka
Workforce Development Board

18 Alliance Blvd. Unit 22,
Barrie, ON L4M 5A5
tel: 705.725.1011 or 1.800.337.4598
fax: 1.888.739.8347
Email: info@smwdb.com
Web: smwdb.com

EMPLOYMENT ONTARIO

This *Employment Ontario* Project is funding by the Government of Ontario.

OCTOBER 2015 Local Labour Market Plan

This Employment Ontario project is funded by the Ontario government.

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EMPLOYMENT ONTARIO

Workforce Planning Ontario
www.workforceplanningontario.ca