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Conference Report

June 15-18, 2000



A Regional Outlook for Northern Boards:

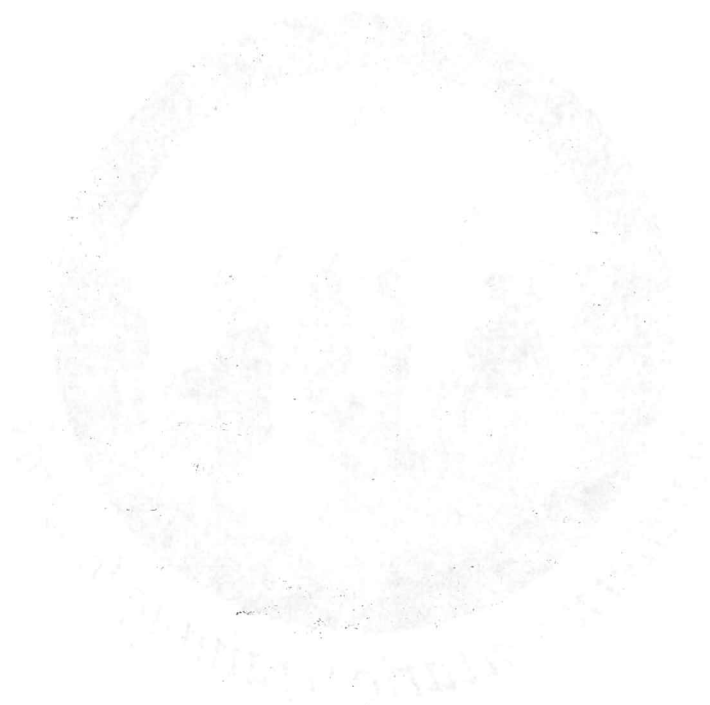
*A Northern Approach to Regional
Labour Force Development*

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Prepared for the Northwest Training and Adjustment Board



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Acknowledgment: The Northwest Training & Adjustment Board is sponsored by the Ministry of Training, Colleges and Universities and Human Resources Development Canada.

Interim Report: Executive Summary

The purpose of this project is to use the combined work of the six Local Area Training Boards in Northern Ontario to develop a regional outlook for labour force development in this region. This project believes that it is useful for all six Local Area Training Boards in Northern Ontario to work together to understand common socio-economic trends in the region and to identify common needs. A regional action strategy can then be developed which will be useful in collaborating with pan-northern economic development partners.

SECTION ONE: SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

COMMON ENVIRONMENTAL SCAN TRENDS: Each of the following trends were mentioned in at least three of the six Northern Environmental Scans: Slow Population Growth, Youth Out-migration, An Aging Population, Decline in Industrial Employment, An Aging Forest Industry Workforce, Increase in Service Sector Employment, Increase in the Presence of Women in the Workforce, Increase in Non-standard Forms of Employment (Part-time, Contract work, Self-employment), Low Levels of Education and Literacy, and Flexibility in the Workforce

RECENT LABOUR FORCE TRENDS: The Labour Force Survey data for the past year shows the following trends: Decrease in Unemployment Rates, Increase in the Number of Employed, Growth in Health-Social Assistance and Transportation Services, and Decline in Public Administration jobs.

SECTION TWO: COMMON IDENTIFIED TRAINING NEEDS

This section lists the most important common training needs as identified in the six Environmental Scans and Local Area Plans and as prioritized by the six northern Boards, the Ministry of Northern Development and Mines, and FedNor. The following five issues were identified as being the most important. In order of importance they are:

1. The Need to Better Market Apprenticeships
2. The Need for a Regional Information Technology Strategy
3. The Need to Promote and Help Organize Literacy Programs
4. The Need for More Flexible Training Delivery Methods
5. The Need to Better Understand the Impact of Multi-skilling

Prepared for the Northwest Training and Adjustment Board

Regional Outlook for Northern Boards:

A Northern Approach to Regional Labour Force Development

Introduction

Background to the Report

The purpose of this project is to use the combined work of the six Local Area Training Boards in Northern Ontario to develop a regional outlook for labour force development in this region. These Boards are part of the 25 Local Area Training Boards established in Ontario in 1994. They were created to assist in assessing the training needs and issues of each area. Each Board is made up of representatives of the key labour market partner groups including primarily business and labour but also including educators and trainers, women, persons with disabilities, francophones, and racial minorities. The Boards also have non-voting representatives from the municipal, provincial, and federal governments. The Boards are sponsored by Human Resources and Development Canada, and the Ontario Ministry of Training, Colleges and Universities

Part of the mandate of these Boards is to conduct yearly Environmental Scans. The primary purpose of these scans is to capture underlying shifts, trends and changes in the socio-economic environment of the Board area and to assess and analyze the local training and adjustment needs. Following the Environmental Scans the Boards produce Local Area Plans which prioritize the needs brought out in the Environmental Scan process and suggest community actions to be taken to address these needs.

While it is very important for Boards to remain focused on the specific needs of their particular areas, it is also true that Northern Ontario as a whole shares many common socio-economic trends and training needs. This has long been recognized by both the provincial and federal governments who have created agencies to deal with the common needs of the region. This project believes that it is useful for all six Local Area Training Boards in Northern Ontario to work together to understand common socio-economic trends in the region and to identify common needs. A regional action strategy can then be developed which will be useful in collaborating with pan-northern economic development partners such as the Ontario Ministry of Northern Development and Mines (MNDM) and the Federal Economic Development Initiative in Northern Ontario (FedNor).

Methodology

The study is based on the following research methods:

- 1) An analysis of the Environmental Scans and Local Area Plans for all six Northern Local Area Training Boards
- 2) An analysis of combined Census and Labour Force Survey data for Northern Ontario.
- 3) Consultation with individuals from MNDM and FedNor

Introduction to Northern Ontario

Northern Ontario comprises over 88% of the land mass of Ontario but represents only 7.7% of the total population of the province. As the region has no legislated boundaries, the definition of the region varies, especially as concerns its southern border. Currently, for the purpose of program delivery and statistical analysis, both the federal and provincial governments have defined Northern Ontario as comprising the Sudbury Regional Municipality and the following districts: Kenora, Rainy River, Thunder Bay, Algoma, Cochrane, Manitoulin, Sudbury, Timiskaming, Nipissing, and Parry Sound. This will be the definition of Northern Ontario used in this report. It should be noted that one of the Northern Ontario Training Boards (LTAB #20) also includes the Muskoka District Municipality.

The history of continuous settlement by non-Natives in Northern Ontario is relatively recent when compared to the rest of Ontario. Settlement in earnest started with the construction of the Canadian Pacific Railway in the late 1870s and 1880s. This was soon followed by the construction of the Canadian Northern Railway and the Grand Trunk and National Transcontinental Railways. Most non-Native communities in the region were initially railway towns.

Following the building of the railways, the region's growth has been driven primarily by the forest industries and by mining. The development of communities were, for the most part, undertaken by large resource extraction corporations based outside the region rather than by local entrepreneurs. This fact has meant that the social and economic structure of this region exhibits several unique characteristics such as:¹

- 1) An overdependence on natural resource exploitation - This has meant a high degree of vulnerability to resource depletion, world commodity prices, corporate policy changes, the boom and bust cycles of the resource industries, changes in the Canadian exchange rate, and changes in government policies regarding Northern Ontario.²

- 2) A high degree of dependency on external forces - The fact that most communities were developed by outside forces means that local entrepreneurship has been more limited than other areas. This has served as a barrier to the cultivation of an entrepreneurial culture in these communities. This is also seen in the area of political decision-making. Unlike most areas of Ontario, Northern Ontario is made up of Districts instead of Counties. Unlike Counties, Districts do not have regional governments. Northern Ontario is unique in Ontario in that unlike the Counties of Southern Ontario there is no regional government serving as an intermediary between the provincial governments and municipalities.³

While all communities in the region share some of these characteristics, Northern Ontario can be divided internally into three different types of communities:

Small and Medium-sized cities - Northern Ontario includes 5 cities with over 40,000 inhabitants. They are, in order of size, Sudbury (160,488), Thunder Bay (125,562), Sault Ste. Marie (83,619), North Bay (64,785), and Timmins (47,499).⁴ While these centres are heavily dependent on the resource industries they are also relatively diversified in that they tend to be important centers for health, education, and other services for the outlying regions.

Resource Dependent Communities - The vast majority of the remaining non-Native communities in the region are resource dependent communities, or single industry towns, which share many distinct characteristics.⁵ These communities are smaller and less diversified economically than the central cities. They are much more directly dependent on resource industries.

First Nations Communities – The region of Northern Ontario is unique in terms of its large number of Aboriginal communities. The Aboriginal population makes up almost 8 percent of the population of the region.⁶ The population in the area of the region north of the 50th parallel is almost entirely made up of these communities. First Nations communities face the greatest number of social and economic challenges of all the communities in the region.

Section One: Socio-Economic and Labour Force Trends in Northern Ontario

This section has two parts. The first part outlines the major socio-economic and labour force trends in Northern Ontario as highlighted in the six Environmental Scans. Data has been taken from Statistics Canada's Census data files and aggregated for the eleven Census Divisions that make up Northern Ontario. The second part looks at the latest data on employment and employment by industry for Northern Ontario using the newly adjusted Labour Force Survey numbers as supplied by Human Resources and Development Canada. Since most Environmental Scans have not dealt with any new data since the summer of 1999 this allows us to see more recent trends.

Common Environmental Scan Trends

Each of the following trends were mentioned in at least three of the six Northern Environmental Scans:

- Slow Population Growth⁷
- Youth Out-migration⁸
- An Aging Population⁹
- Decline in Industrial Employment¹⁰
- An Aging Forest Industry Workforce¹¹
- Increase in Service Sector Employment¹²
- Increase in Non-standard Forms of Employment¹³ (Part-time, Contract work, Self-employment)
- Low Levels of Education and Literacy¹⁴
- Flexibility in the Workforce¹⁵

Slow Population Growth

Since 1971 the population of Northern Ontario has grown quite slowly whereas the growth rates for Ontario as a whole have been quite high. These rates of growth seem to mirror the transformation of Western economies from industrialism to post-industrialism. Whereas Ontario as a whole has benefitted from the growing need for knowledge-based, information services, Northwestern Ontario has, to a much greater extent than the province, remained dependent on resource industrialism. While the demand for the commodities produced by these industries has, despite predictions in the late 80s, remained relatively strong, technological change has meant that the number of workers needed to produce these commodities has decreased.

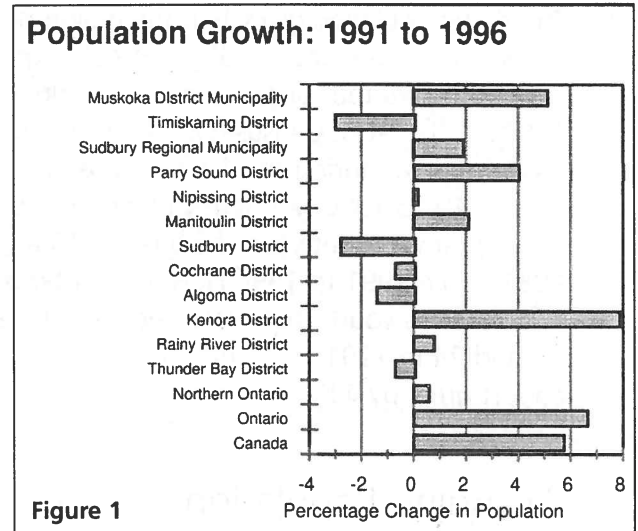
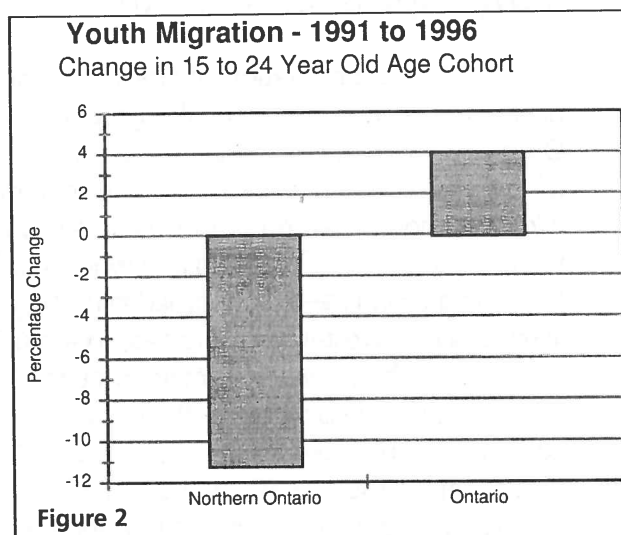


Figure 1 shows that while Ontario's population grew by 6.6% between 1991 and 1996, Northern Ontario's growth was less than 0.5%. Figure 1 also shows that the rates of growth among the different districts vary considerably. Those closest to large urban regions, Kenora, Muskoka, and Parry Sound, had the highest rates of growth. Kenora's growth was in large part due to the higher rates of growth in Aboriginal communities. One third of the population of the Kenora District is made up of Aboriginals.

The slow rates of population growth are also reflected in the failure of the region to attract new immigrants. According to the 1996 Census, 10.8% of the population of Ontario is made up of immigrants who have only arrived in Canada since 1981 - 5.2% have arrived since 1991. The situation in Northern Ontario is considerably different. Whereas until the 1970s the region was a major destination for recently arrived immigrants, this has certainly not been the case since then. Only 1.16% of the population of the region immigrated to Canada since 1981 - only 0.4% have immigrated since 1991. Studies have shown that it is the metropolitan areas of Southern Ontario that are the destination of choice for recently arrived immigrants.¹⁶

Youth Out-migration

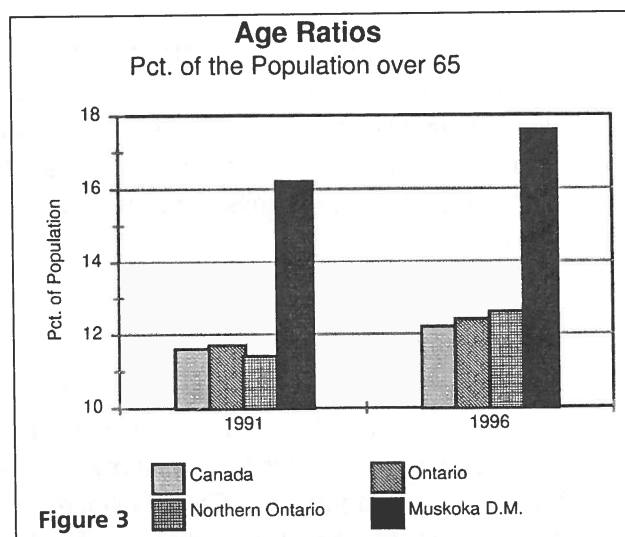
The slow population growth in the region is also linked to the continuing problem of youth out-migration. This was a problem that became important during the 1980s.¹⁷ The latest Census data show that the problem has continued during the 1990s but at a slower rate. From 1981 to 1986 Northern Ontario lost 15.3% of its youth that were between the ages of 15 and 24 in 1981. From 1991 to 1996 Northern Ontario lost 11.2% of its youth that were between the ages of 15 and 24 in 1991. For Ontario as a whole this age cohort grew by 4%.



An Aging Population

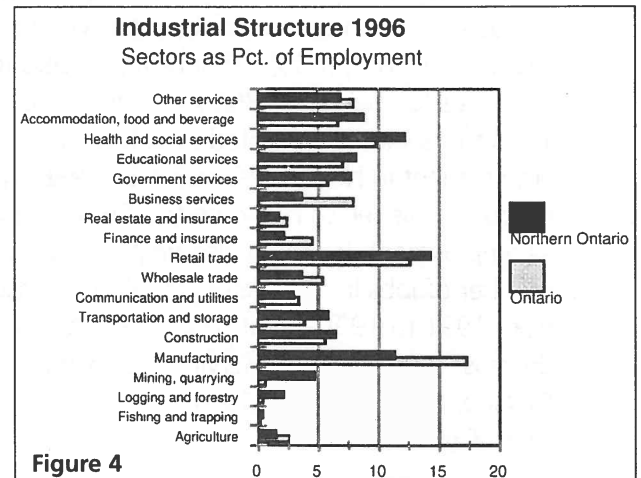
The combined result of a slow population growth, a lack of new immigrants, and continued youth out-migration has meant that the population of Northern Ontario is aging more rapidly than the nation or the province as a whole – this despite the fact that for most of its history Northern Ontario has had a population that was younger than the provincial average. As Figure 3 shows, the percentage of the population over 65 was less than the Ontario average in 1991. By 1996 this percentage was higher than the provincial average. The Aboriginal population of the region is much younger than the non-Native population and this fact tends to skew figures for the region as a whole. Those districts with the highest percentage of Aboriginals tend to have the youngest population.

This population is younger for two main reasons: they have had higher birth rates recently and, because of social and health conditions in their communities, they tend to die earlier.¹⁸ The highest percentages of elderly are found in the "cottage country" districts of Parry Sound and Muskoka.



Decline of Employment in the Industrial Resource Sector

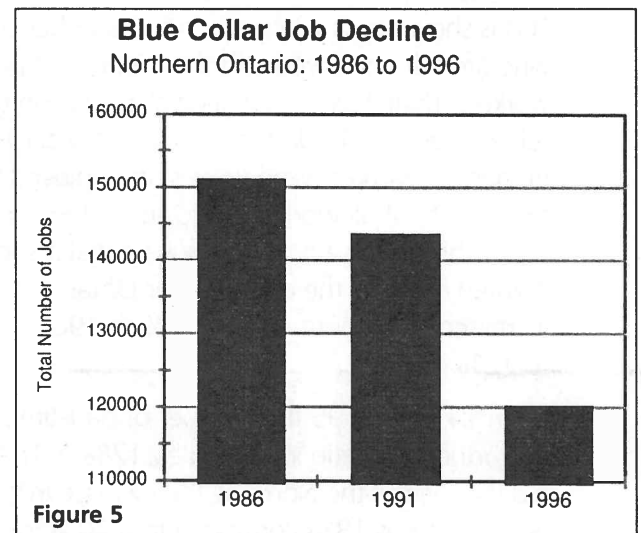
Blue collar industrial jobs had been the largest single group of jobs in the regional economy since the arrival of the railways and the origins of the forest industries and mining industries. Historically this has been a factor which differentiated the region from many other regions in Ontario. Northern Ontario still has a substantially higher percentage of these types of jobs than for the province as a whole.¹⁹ The structure of these types of jobs differ from the province as a whole in that the percentage of manufacturing jobs in the North is less than for the province. This is countered however by a higher percentage of jobs in logging and forestry, mining, construction, and transportation.



From 1986 to 1996 the total number of blue collar industrial jobs declined from 151,010 to 120,095, or by 20.5%. In general this shift appears to be the result of changes in technology but other, more specific factors such as the decline in the importance of the grain trade in Thunder Bay has also played a role.

An Aging Forest Industry Workforce

The fact that there has been no growth in industrial employment has meant that in sectors such as the pulp and paper industry there were very few new hirings in the 1980s and 1990s. One result of this is that the average age of the workforce in these types of sectors has increased substantially. While it is difficult to get accurate data on this phenomena many interviews with key informants referred to it.



Increase in Service Sector Employment

Along with the decline in blue collar industrial employment has been a rise in service sector employment. If the industrial sector lost 30,915 jobs from 1986 to 1996, the service sector gained 30,365 jobs during this period. In 1986 this sector represented 226,325 jobs, or 60% of all employment in Northern Ontario. By 1996 the number of jobs in this sector had risen to 256,690 or 66.3% of all employment. It should also be pointed out that the number of jobs in this sector actually decreased by 2,265 from 1991 to 1996. Most of this loss came from a 31% decrease in government service employment in Northern Ontario, from 41,440 in 1991 to 28,630 in 1996.

Increase in Non-standard Forms of Employment

Several of the Environmental Scans noted that there has been an increase in the number of non-standard types of jobs - those where the worker is not a permanent full-time employee working at least 30 hours a week. This is shown by an increase in the number of workers who are self-employed and the number of part-time workers. There has been a general increase in the level of self-employment in Northern Ontario since 1986. The number of workers who were self-employed has gone from 4.8% of all workers in 1986 to 9.6% in 1996. While this increase has been substantial it should be pointed out that the averages for Ontario as a whole increased even more - from 5.7% in 1986 to 12% in 1996.

From 1990 to 1995 the number of part-time workers in Northern Ontario increased by 12%.²⁰ The increase did vary across the North as the increase in the Northeast was 13% compared to a 10% increase in the Northwest. The number of workers who worked full-time fell by 7.9% during this time period. Ontario as a whole experienced a similar decrease in full-time employment.

Figure 6

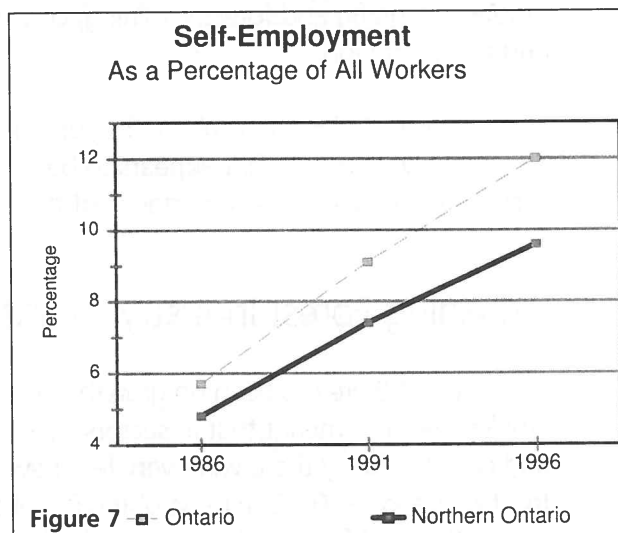
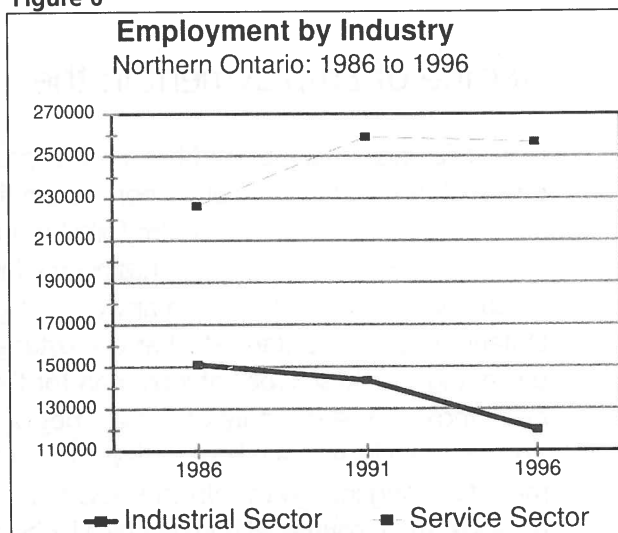


Figure 7 ■ Ontario — Northern Ontario

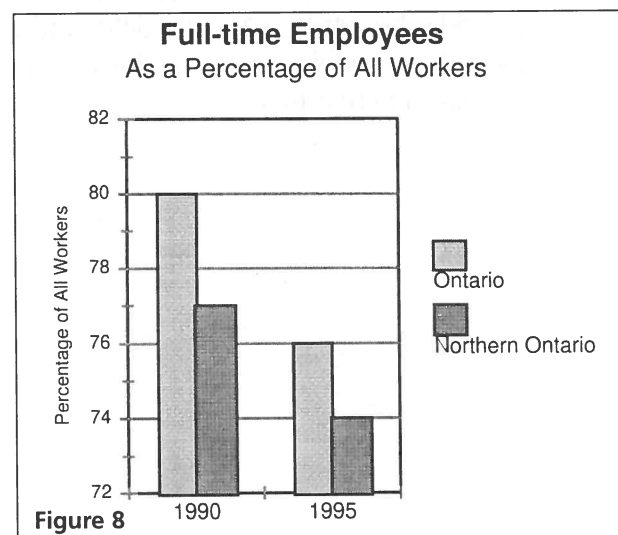
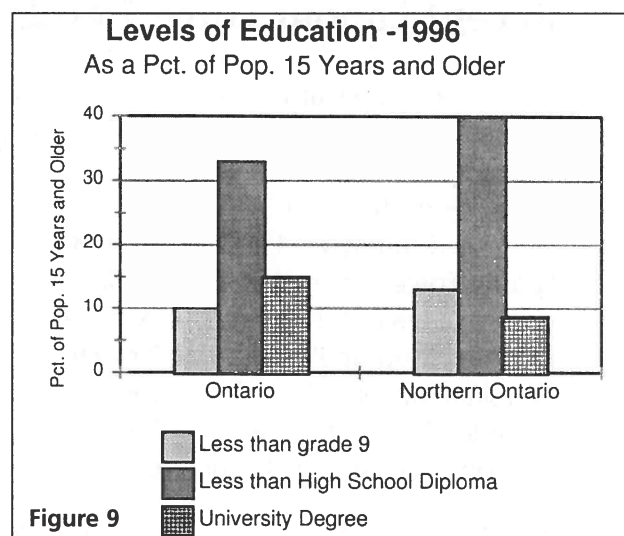


Figure 8

Low Levels of Education and Literacy

The predominance of unskilled and semi-skilled jobs has meant that Northern Ontario has traditionally had lower levels of education than Ontario as a whole. This is due in part to the historical predominance of unskilled and semi-skilled jobs in the region. The 1996 Census data shows that this situation has not changed. In Ontario, 33% of the population 15 and over had less than a high school diploma as their highest level of schooling. The figure for Northern Ontario was substantially higher at 39.9%. While the 1996 Census shows an increase in the percentage of people with a high school degree, this increase was not as great as for the province as a whole. From 1986 to 1996 the percentage of the population 15 years or over that had less than a high school diploma decreased by 20.4%. In Ontario as a whole the decrease was 23.3%. In terms of the percentage of the population 15 years and over who had a university degree, the number for Northern Ontario increased by 33.8% from 1986 to 1996. The same percentage for Ontario increased by 38%. These figures show then that the region is falling further behind the province in terms of its overall levels of education. The Census data also shows that the low levels of educational attainment are worse in the older age groups than the younger ones.



Flexibility in the Workforce

Several of the Environmental Scans referred to the trend towards an increased demand for flexibility in the workforce. A large number of key informants pointed to the recent trend in the resource industries towards multi-skilling. The old industrial trades system of specialized skills is being rejected by companies who now are looking for increased flexibility in their production processes. They now require individuals who have several skills. This trend may also be beneficial to workers in that the possession of several skills may make them more employable. Problems can develop, however, if the standards for certain trade skills start to become diluted by multi-skilling.

Recent Labour Force Trends

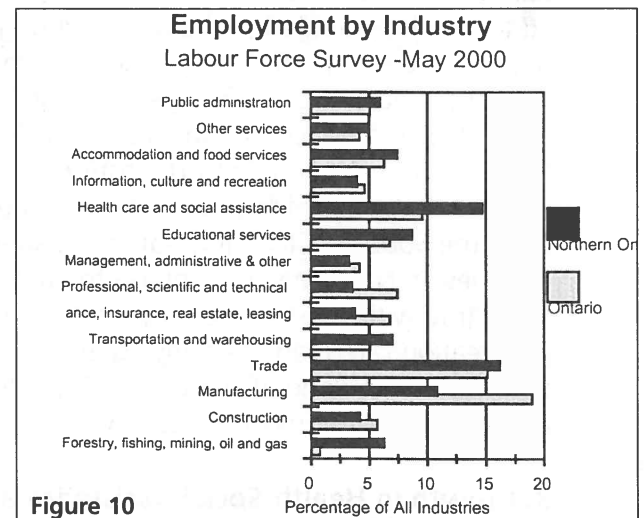
This section looks at the latest data on employment and employment by industry for Northern Ontario using the newly adjusted Labour Force Survey numbers. Since the Environmental Scans have not dealt with any new data since the summer of 1999 this allows us to see any more recent trends. As well, Labour Force Survey numbers are not available for the local board areas in Northern Ontario. These areas are forced to rely on 1996 Census data which, although more reliable, is less up to date than the Labour Force Survey.²¹ Data is available from the monthly Labour Force Survey for the following geographical areas in Northern Ontario: Economic Region 590 (Northeastern Ontario including the Sudbury Regional Municipality and the Districts of Algoma, Cochrane, Sudbury, Manitoulin, Nipissing, Timiskaming, and Parry Sound), Economic Region 595 (Northwestern Ontario including the Districts of Thunder Bay, Rainy River, and Kenora), the Census Metropolitan Area of Sudbury, and the Census Metropolitan Area of Thunder Bay.

There were major revisions to the Labour Force Survey (LFS) at the beginning of 2000. These revisions reflected two important changes: first, all LFS estimates were adjusted to reflect 1996 Census population counts. Second, composite estimation was adopted. This new data is slowly being made available for past years.

The Industrial Structure of the Northern Ontario Economy in 2000

Important differences remain between the industrial structure of Ontario as a whole and that of Northern Ontario. Figure 10 shows that Northern Ontario still has a lower percentage of manufacturing jobs despite the importance of the pulp and paper and sawmill industries. As well, Northern Ontario has a lower percentage of jobs in finance-related industries, professional services and management services.

The region has a higher percentage of jobs in primary forestry and mining and in government-related services such as education, health and social assistance, and public administration. It also has a higher percentage of people employed in accommodation and food services.

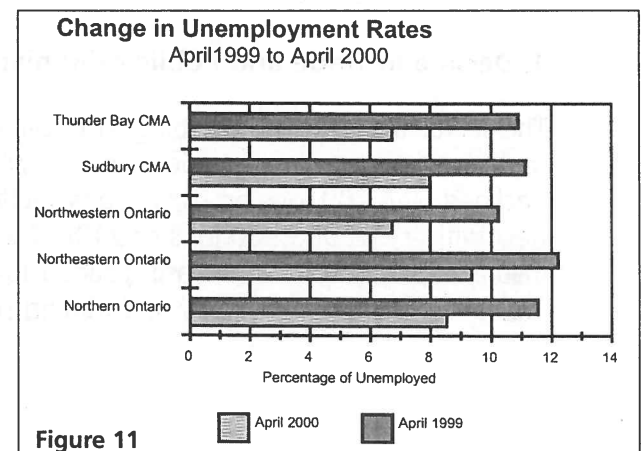


The Labour Force Survey data for the past year shows the following trends:

1. Decrease in Unemployment Rates
2. Increase in the Number of Employed
3. Growth in Health-Social Assistance and Transportation Services
4. Decline in Trade and Public Administration

1. Decrease in Unemployment Rates

Over the past year Northern Ontario has witnessed an important decrease in its unemployment rates. While the rest of Ontario had been benefitting from declines in the unemployment rates from as early as 1993, it has only been in this past year that this region has started to share in this economic growth. The unemployment rate for Northern Ontario fell by 27%, from 11.5% to 8.5% over the course of the year. Figure 11 shows that this decrease in unemployment was felt across the whole region but that the greatest impact was felt in Northwestern Ontario.



2. Increase in the Number of Employed

This decrease in unemployment was not the result of people leaving the labour force but primarily due to an increase in the number of jobs. There were 8,900 additional jobs created in the region during this period, an increase of 2.5%. It is interesting to note that the Labour Force Survey numbers indicate that there were some differences in job creation within Northwestern Ontario. In Northeastern Ontario it appears that most of the new jobs were being created in the Sudbury CMA and not in the smaller communities. In Northwestern Ontario the reverse appears to be true with the Thunder Bay CMA having a lower job creation rate than the outlying areas. The analyses that have been done of the Labour Force Survey data also point out that most of the new jobs that are being created are full-time ones and not part-time²².

Increase in Number of Employed

April 1999 to April 2000

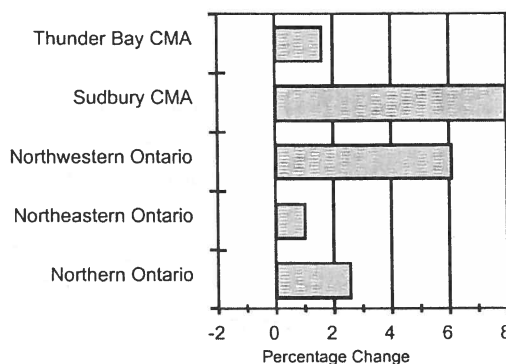


Figure 12

3. Growth in Health-Social Assistance and Transportation Services

Most of the employment growth came in one sector - health care and social assistance services. This sector grew by 10,800 jobs, an increase of over 26% for that sector. Next came jobs in the transportation and warehousing sector which increased by 5,100 or 26%. Other sectors that showed important increases were information, culture and recreation services, with 3,600 jobs, educational services with 2,600 jobs, and the manufacturing sector, with 1,300 jobs.

4. Decline in Trade and Public Administration

The sector that showed the biggest decline in employment was public administration services which declined by 4,700 jobs or 18%. Construction was next with a loss of 3,900 jobs or 21%. The finance, insurance, real estate and leasing sector lost 3,500 jobs and the primary forestry and mining sector lost 2,500 jobs (10%).

Change in Employment

Northern Ontario: May 1999 - May 2000

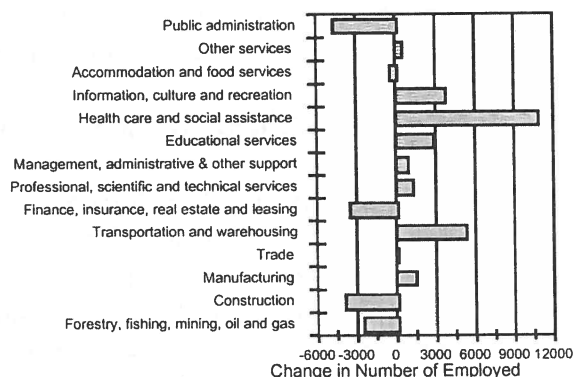


Figure 13

Section Two: Common Identified Training Needs

This section lists the most important common training needs as identified in the six Environmental Scans and Local Area Plans. While each Board has pointed out needs specific to their area, the Environmental Scans and Local Area Plans also show a large number of needs that are common to Northern Ontario as a whole. The preliminary report listed the 12 most common needs as identified by the Environmental Scans and the Local Area Plans of the six Northern training boards. These 12 needs were then prioritized through the use of a questionnaire sent to all six boards and representatives of MNDM and FedNor. All of the agencies responded to the questionnaire with the result that the following five issues were identified as being the most important²⁴. In order of importance they are:

1. Need to Better Market Apprenticeships
2. Need for a Regional Information Technology Strategy
3. Need to Promote and Help Organize Literacy Programs
4. Need for More Flexible Training Delivery Methods
5. Need to Better Understand the Impact of Multi-skilling

Need to Better Market Apprenticeships Many of the Northern Boards are concerned about the situation with apprenticeships in the region. There is a feeling that apprenticeships must be better promoted as a training need in the standard industrial trades. Business has to be sold on the merits of offering apprenticeships. Youth have to be made aware of the availability and benefits of apprenticeships as a means of keeping them in the North. As well, women have to be convinced of the desirability of entering apprenticeship programs that have historically been reserved for men.

Need for a Regional Information Technology Strategy With the new economy depending more and more upon the information technology sector for jobs and with the increasing need for computer literacy in all sectors of employment, several of the Boards have noted the need for a strategy to address these issues. The need is especially important in the North which still depends heavily on the unskilled and semi-skilled jobs provided by resource industries. These resource industries themselves are increasingly adapting new information technology to their needs.

Need to Promote and Help Organize Literacy Programs The more educated a population the better that population is able to adapt to changing economic situations. The Census data analyzed earlier clearly shows that Northern Ontario is at a disadvantage in terms of its ability to adapt to changing market conditions in that its adult population has lower levels of formal education than for Ontario as a whole. New employers are looking for people with higher levels of education as changes in technology requires employees who are "trainable" and have an "ability to learn". As such many of the Boards have pointed to the need to more actively promote and help organize literacy programs in the region.

Need for More Flexible Training Delivery Methods The geographical isolation and small size of many of the communities in Northern Ontario makes it difficult for individuals to access training programs. Often they must leave their community and travel long distances to receive training. This is an extremely important barrier to training to individuals in these communities. Many of the Boards have pointed out that new methods of delivery must be developed through which individuals can access such programs. These programs need to be more flexible in term of numbers required. New communications technology needs to be developed by which training programs can be accessed from a distance. In developing these new programs, agencies must also ensure that the quality of education does not suffer.

Need to Better Understand the Impact of Multi-skilling A number of the Boards have pointed to the recent trend in the resource industries towards multi-skilling. The old industrial trades system of specialized skills is being rejected by companies who now are looking for increased flexibility in their production processes. They now require individuals who have several skills. This trend may also be beneficial to workers in that the possession of several skills may make them more employable. Problems can develop, however, if the standards for certain trade skills start to become diluted by multi-skilling. There is a need to better understand the impact of multi-skilling on workers, on training programs, and on industries.

SECTION THREE: THE CREATION OF A REGIONAL ACTION STRATEGY

The next step in the process is the creation of a regional action strategy. During the course of the meetings discussions will be held on what can be done to address the above mentioned needs. A regional action strategy can then be developed which will be useful in collaborating with pan-northern economic development partners such as the Ontario Ministry of Northern Development and Mines (MNDM) and the Federal Economic Development Initiative in Northern Ontario (FedNor). The results of these discussions will be summarized in the final version of this report to be delivered by the end of June.

Notes

1. This has been pointed out by several government studies undertaken over the past 30 years including the Royal Commission on the Northern Environment (the Fahlgren Report) and the Task Force on Resource Dependent Communities in Northern Ontario (the Rosehart Report).
2. For an elaboration on these points see Dadgostar et al, 1992, p.2.
3. For a detailed discussion of this aspect of Northern Ontario see McBride et al., 1993.
4. Canada, 1996 Census. These totals are for either Census Metropolitan Areas (CMAs) or Census Agglomerations (CAs).
5. An elaboration on these unique characteristics can be found in Randall and Ironsides, 1996.
6. Census population statistics for First Nations communities tend to be less reliable than those for non-Native communities.
7. This trend was noted by Board #21 (Environmental Scan, 1999:p.15), Board #22 (Environmental Scan, 1998:p.18), Board #23 (Environmental Scan, 1999:p.21), Board #24 (Environmental Scan, 1999:p.6), Board #25 (Environmental Scan, 1999:p.6).
8. This trend was noted by Board #20 (Environmental Scan, 1999:p.10), Board #21 (Environmental Scan, 1999 Executive Summary:p.10), Board #23 (Environmental Scan, 1999:p.13), Board #24 (Environmental Scan, 1999:p.7), Board #25 (Environmental Scan, 1999:p.7).
9. This trend was noted in Board #20 (Environmental Scan, 1999:11), Board #23 (Environmental Scan, 1999:p.8), Board #24 (Environmental Scan, 1999:p.7), Board #25 (Environmental Scan, 1999:p.7).
10. This trend was noted in Board #20 (Environmental Scan, 1999:p.14), Board #21 (Environmental Scan, 1999:p.11), Board #23 (Environmental Scan, 1999:p.8), Board #24 (Environmental Scan, 1999:p.6), Board #25 (Environmental Scan, 1999:p.6).
11. This trend is noted in Board #20 (Environmental Scan, 1999:p.16), Board #21 (Environmental Scan, 1999:p.51), Board #22 (Environmental Scan, 1998:p.44), Board #23 (Environmental Scan, 1999:p.8).
12. This trend is noted in Board #20 (Environmental Scan, 1999:p.14), Board #21 (Environmental Scan, 1999:p.11), Board #22 (Environmental Scan, 1998:p.44), Board #23 (Environmental Scan, 1999:p.8), Board #24 (Environmental Scan, 1999:p.6), Board #25 (Environmental Scan, 1999:p.6).
13. This trend is noted in Board #20 (Environmental Scan, 1999:p.6), Board #21 (Ecan, 1999 Executive Summary: p.12), Board #23 (Environmental Scan, 1999:p.8).

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14. This trend is noted in Board #21 (Environmental Scan, 1999:p.16), Board #23 (Environmental Scan, 1999:p.24), Board #24 (Environmental Scan, 1999:p.8), Board #25 (Environmental Scan, 1999:p.8).
 15. This trend is noted in Board #22 (Environmental Scan, 1998:p.44), Board #24 (Environmental Scan, 1999:p.18), Board #25 (Environmental Scan, 1999:p.18).
 16. See Badets, 1994; Logan, 1994; and Ray, 1994.
 17. See Youth Migration: Northern Perspectives, 1991.
 18. See Southcott, 1993.
 19. Blue collar industrial employment includes the following census categories: Logging and Forestry, Mining and Quarrying, Manufacturing, Construction, Transportation and Storage, Communication and Utilities. Longitudinal consistency requires that the categories of Agriculture and Trapping and Fishing also be included in this definition as the 1986 categories did not separate these categories from Mining and Primary Forestry employment.
 20. The years 1990 and 1995 are used as they are the years that were surveyed in the 1991 and 1996 Census. The data on part-time employment used here is the result of a special tabulation done by Statistics Canada and contained in HRDC's 1996 Ontario Regional Economist Census Profiles (http://www.on.hrdc-drhc.gc.ca/english/lmi/eaide/ore/cen96/no/590fp_e.html).
 21. It should be pointed out that the data for Northern Ontario produced by the Labour Force Survey is weak in reliability compared to the Census, based as it is on estimations and limited sample sizes.
 22. See, Lakeland Area HRC Labour Market Bulletin, March, 2000 (http://lakeland.hrdc-drhc.gc.ca/english/marbul_e.shtml) and Thunder Bay HRC Labour Market Bulletin, March, 2000 (<http://thunder-bay.hrdc-drhc.gc.ca/rpts/lmbmar00.htm#>)
 23. As was the case with the common trends I have tried to list those needs that were identified by at least three of the Northern Boards. In addition, the fact that the needs identified by Boards 24 and 25 are very similar has meant that I have tried to list only those needs identified by at least two of the Northeastern Boards.
 24. In terms of ranking the 12 needs were prioritized using a IO point ranking system with IO points given for a first place ranking and I point given for a tenth place ranking. Using this system the order of ranking and the points each need received are as follows:

-Need to Better Market Apprenticeships	56 points
-Need for a Regional Information Technology Strategy	48 points
-Need to Promote and Help Organize Literacy Programs	45 points
-Need for More Flexible Training Delivery Methods	42 points

-Need to Better Understand the Impact of Multi-skilling	37 points
-Need for More Accurate Labour Market Information	37 points
-Need for Greater Communication Amongst Educators and Trainers	32 points
-Need for the Promotion of Entrepreneurial and Small Business Skills	32 points
-Need to Help Small and Mid-sized Businesses Take Better Advantage of Training	28 points
-Need for a Central Directory of Training Programs	26 points
-Need to Increase the Training Opportunities for Persons With Disabilities	20 points
-Need to Study the Impact of an Aging Forest Industry Workforce	15 points

It should be noted that the fifth most important need, the need for a better understanding of the impact of multi-skilling, received the same number of points as the sixth most important need, that of the need for more accurate labour market information. As only five needs were to be chosen, multi-skilling was chosen by the researcher as a more suitable topic. This decision was based on the notion that a discussion of the impact of multi-skilling would be more fruitful than a discussion of the problems with existing labour market information.

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Far Northeast Training Board, Local Area Training Plan, Hearst, 2000 (LTAB#23)

North Superior Training Board, Local Area Plan 2000-2001, Thunder Bay, 1999 (LTAB#24)

Northwest Training and Adjustment Board, Local Area Plan, Dryden, 1999 (LTAB#25)







A Regional Outlook for Northern Boards: A Northern Approach to Regional Labour Force Development

**Interim Report
June 12, 2000**

**By Chris Southcott, Ph.D.
Lakehead University
Thunder Bay, Ont**

WHAT IS THE PURPOSE OF THIS OUTLOOK?

- **TO IDENTIFY COMMON SOCIO-ECONOMIC TRENDS AND TRAINING NEEDS IN NORTHERN ONTARIO**
- **TO DEVELOP A REGIONAL ACTION STRATEGY TO RESPOND TO THESE NEEDS**
- **TO USE THIS STRATEGY TO ENCOURAGE COOPERATION BETWEEN THE NORTHERN BOARDS AND OTHER PAN-NORTHERN PARTNERS SUCH AS MNM AND FEDNOR**

METHODOLOGY

THIS STUDY IS BASED ON THE FOLLOWING RESEARCH METHODS:

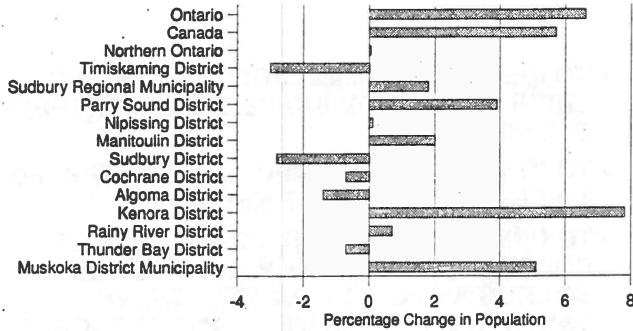
- **An analysis of the Environmental Scans and Local Area Plans for all six Northern Local Area Training Boards**
- **An analysis of combined Census and Labour Force Survey data for Northern Ontario.**
- **Consultation with MNM and FedNor**

CONTENTS

- **SECTION ONE: SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO**
 - **COMMON ENVIRONMENTAL SCAN TRENDS**
 - **RECENT LABOUR FORCE TRENDS**
- **SECTION TWO: COMMON IDENTIFIED TRAINING NEEDS**
- **SECTION THREE: THE CREATION OF A REGIONAL ACTION STRATEGY**

SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

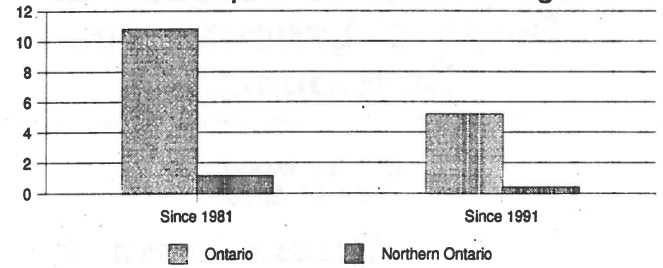
1. SLOW POPULATION GROWTH



SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

1a. ABSENCE OF NEW IMMIGRANTS

Pct. of the Population that have Immigrated:

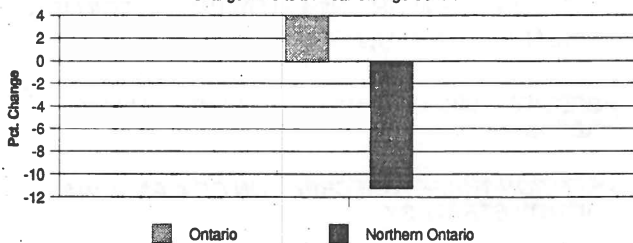


SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

2. YOUTH OUT-MIGRATION

Youth Migration - 1996

Change in 15 to 24 Year Old Age Cohort

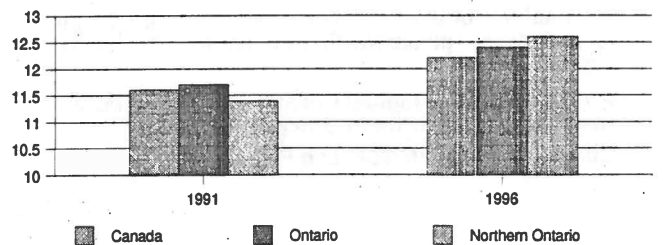


SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

3. AN AGING POPULATION

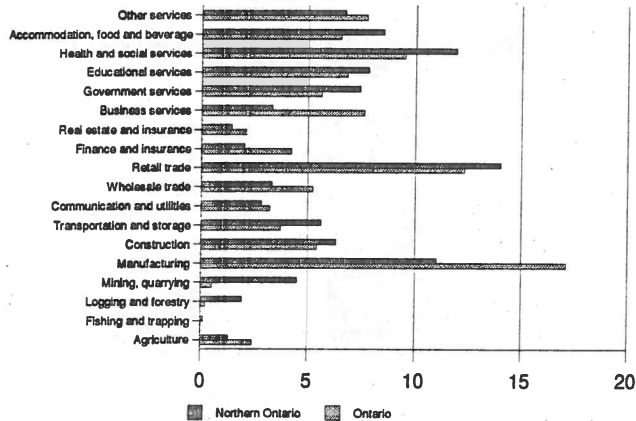
Age Ratios

Pct. of the Population over 65



Industrial Structure - 1996

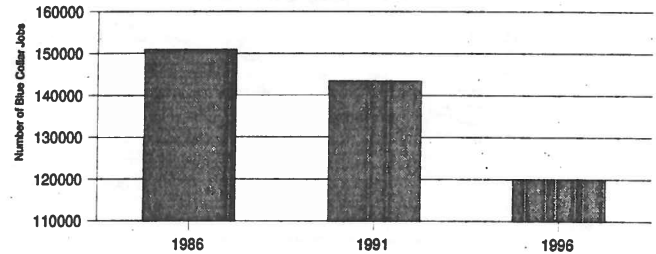
Sectors as Pct. Of Employment



SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

4. DECLINE OF EMPLOYMENT IN THE INDUSTRIAL RESOURCE SECTOR

Blue Collar Job Decline Northern Ontario 1986 to 1996



SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

5. AN AGING FOREST INDUSTRY WORKFORCE

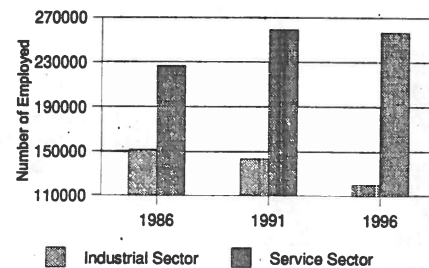
- LACK OF ACCURATE DATA
- INTERVIEWS HAVE REVEALED THE BELIEF THAT FEW HIRINGS IN PULP AND PAPER IN THE 1980S AND 1990S HAS MEANT THE EXISTING WORKFORCE HAS AGED CONSIDERABLY
- THIS COULD LEAD TO A SHORTAGE OF EXPERIENCED LABOUR IN THE NEXT 10 YEARS

SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

6. AN INCREASE IN SERVICE SECTOR EMPLOYMENT

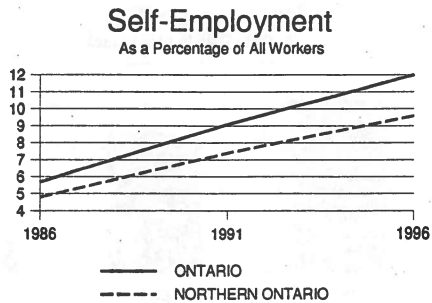
Employment by Industry

Northern Ontario: 1986 to 1996



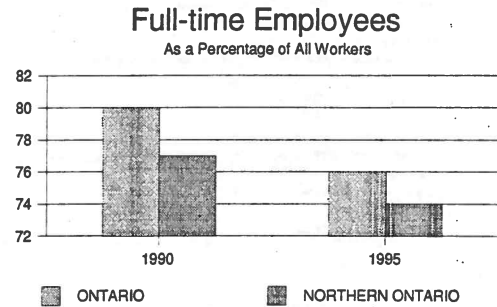
SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

7. INCREASE IN NON-STANDARD FORMS OF EMPLOYMENT



SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

7. INCREASE IN NON-STANDARD FORMS OF EMPLOYMENT

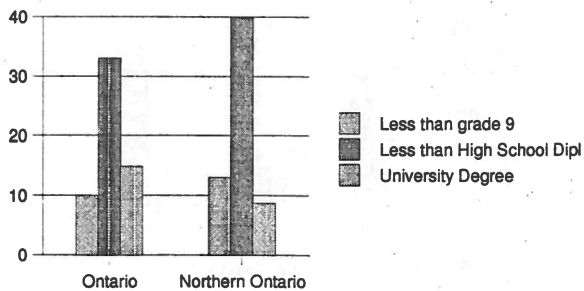


SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

8. LOW LEVELS OF EDUCATION AND LITERACY

Levels of Education - 1996

As a Pct. of Pop. 15 Years and Older



SOCIO-ECONOMIC AND LABOUR FORCE TRENDS IN NORTHERN ONTARIO

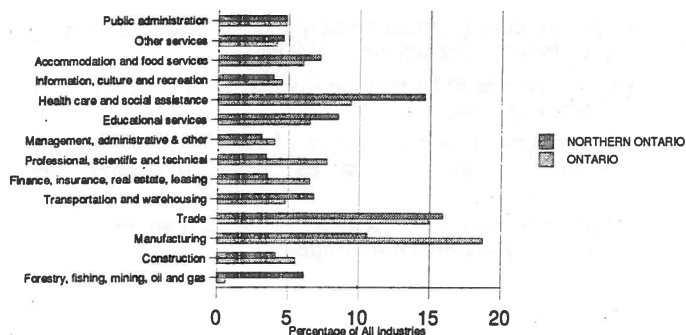
9. FLEXIBILITY IN THE WORKFORCE

- KEY INFORMANTS HAVE POINTED TO THE TREND IN RESOURCE INDUSTRIES TOWARDS MULTI-SKILLING
- CONCERN EXISTS AS TO WHETHER THIS WILL LEAD TO THE WATERING DOWN OF TRADE SKILLS

RECENT LABOUR FORCE TRENDS

THE INDUSTRIAL STRUCTURE OF THE NORTHERN ONTARIO ECONOMY IN 2000

Employment by Industry Labour Force Survey - May, 2000

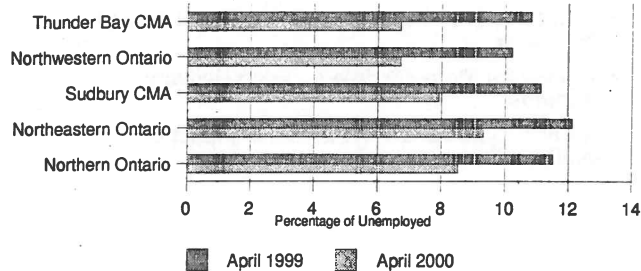


RECENT LABOUR FORCE TRENDS

1. DECREASE IN UNEMPLOYMENT RATES

Change in Unemployment Rates

April, 1999 to April, 2000

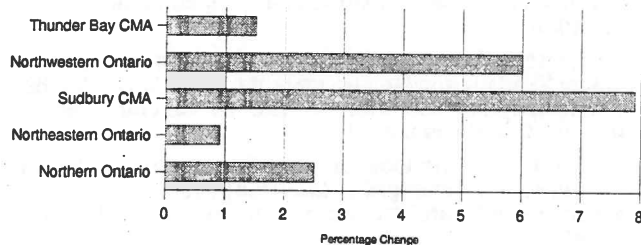


RECENT LABOUR FORCE TRENDS

2. INCREASE IN THE NUMBER OF EMPLOYED

Increase in Number of Employed

April, 1999 to April, 2000

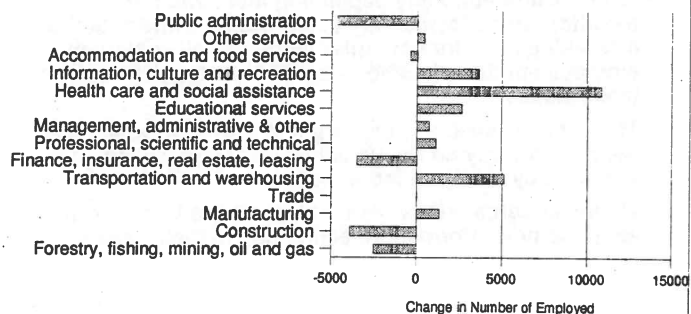


RECENT LABOUR FORCE TRENDS

3. GROWTH IN HEALTH-SOCIAL ASSISTANCE AND TRANSPORTATION SERVICES AND 4. DECLINE IN PUBLIC ADMINISTRATION

Change in Employment

Northern Ontario - May, 1999 to May, 2000



Common Identified Training Needs

THE FIVE MOST IMPORTANT TRAINING NEEDS IN ORDER OF IMPORTANCE

- 1. Need to Better Market Apprenticeships
- 2. Need for a Regional Information Technology Strategy
- 3. Need to Promote and Help Organize Literacy Programs
- 4. Need for More Flexible Training Delivery Methods
- 5. Need to Better Understand the Impact of Multi-skilling

Common Identified Training Needs

1. Need to Better Market Apprenticeships

- Apprenticeships must be better promoted as a training need in the standard industrial trades.
- Business has to be sold on the merits of offering apprenticeships.
- Youth have to be made aware of the availability and benefits of apprenticeships as a means of keeping them in the North.
- Women have to be convinced of the desirability of entering apprenticeship programs.

Common Identified Training Needs

2. Need for a Regional Information Technology Strategy

- With the new economy depending more and more upon the information technology sector for jobs and with the increasing need for computer literacy in all sectors of employment there is a need for a strategy to address these issues.
- The need is especially important in the North which still depends heavily on the unskilled and semi-skilled jobs provided by resource industries.
- These resource industries themselves are increasingly adapting new information technology to their needs.

Common Identified Training Needs

3. Need to Promote and Help Organize Literacy Programs

- The more educated a population the better that population is able to adapt to changing economic situations.
- Northern Ontario is at a disadvantage in terms of its ability to adapt to changing market conditions in that its adult population has lower levels of formal education than for Ontario as a whole.
- New employers are looking for people with higher levels of education as changes in technology requires employees who are "trainable" and have an "ability to learn".

Common Identified Training Needs

4. Need for More Flexible Training Delivery Methods

- The geographical isolation and small size of many of the communities in Northern Ontario makes it difficult for individuals to access training programs.
- New methods of delivery must be developed through which individuals can access such programs.
- These programs need to be more flexible in term of numbers required.
- New communications technology needs to be developed by which training programs can be accessed from a distance.
- In developing these new programs, agencies must also ensure that the quality of education does not suffer.

Common Identified Training Needs

5. Need to Better Understand the Impact of Multi-skilling

- The old industrial trades system of specialized skills is being rejected by companies who now are looking for increased flexibility in their production processes.
- Companies now require individuals who have several skills.
- This trend may also be beneficial to workers in that the possession of several skills may make them more employable.
- Problems can develop, however, if the standards for certain trade skills start to become weakened by multi-skilling.
- There is a need to better understand the impact of multi-skilling on workers, on training programs, and on industries.

THE NEXT STEP: THE CREATION OF A REGIONAL ACTION STRATEGY

- Discussions will be held on what can be done to address the above mentioned needs.
- A regional action strategy can then be developed which will be useful in collaborating with pan-northern economic development partners such as the Ontario Ministry of Northern Development and Mines (MNDM) and the Federal Economic Development Initiative in Northern Ontario (FedNor).



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