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Kingston Economic Development Corporation

Labour Market and Employment Trends Analysis

February 11, 2013

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Executive Summary

Introduction

The Kingston Economic Development Corporation (KEDCO) has initiated this research project to assess current and forecasted labour market trends and opportunities for the city of Kingston. This report informs the local labour market situation and offers targeted local strategies that are designed to strengthen labour recruitment, retention and planning. Specifically the report will inform decision makers and influencers of the following:

- current employment gaps and the factors influencing recruitment and attraction efforts;
- short-term employer labour needs and the qualities and skills being sought;
- longer-term forecasts for labour based on such influencing factors as projected retirements, industry turn-over rates, labour force churn (job gains to job losses to inform labour movement);
- national and provincial trends that may impact the ability of Kingston area employers to attract and retain a talent pool that is aligned with local needs.

Situational Analysis

Canadian employers forecast a favourable hiring climate. This stability and growth is contrasted with the downturn of the global economy catalyzed by the sovereign debt crisis in Europe and the continued turmoil in the Middle East. These events have led to a global slowdown marked by lower production in China and India, and slow growth in the United States. Canada's economy has remained generally favourable since December 2009 with Canadian employers creating over 260,000 full time jobs, replacing virtually all of the number of jobs lost during the recession.

There are a number of trends that policy analysts and those involved in workforce planning must remain cognizant of in order to continue to develop a labour force that promotes strong economic growth into the future:

An Ageing Population – The impending retirement of the baby boomer generation over the course of the next decade, with fewer workers available to replace them, presents a Canadian dilemma of significant skilled labour shortages.

Underrepresented Segments of the Canadian Labour Force – Young people (ages 15 to 24) suffer from higher unemployment rates than other age groups. People over the age of 60 are the fastest growing age group and many want to continue working. With their knowledge and experience, older workers are tremendous assets for businesses in their day-to-day operations and in transferring of knowledge to younger workers. Aboriginal peoples are the fastest growing segment of the Canadian population, yet they continue to suffer from a higher unemployment, lower education achievement and under-representation in the knowledge-based economy relative to non-Aboriginals.

Skilled Labour and Productivity - With fewer skilled workers, it is essential for Canadian businesses to boost their labour productivity. Canada's overall record on business sector productivity compared to the United States has spread. Canada's productivity was 78 per cent of that of the United States in 2008, down from 90 per cent in the early 1980s. Achieving a rise in productivity will be very difficult. More Canadian businesses must boost productivity growth through greater investment in capital equipment and new technologies, research and development (R&D), adoption of international best practices and human capital formation in the workplace at the managerial and sub-managerial levels. Increased productivity is achieved through the bringing of new, innovative goods and services to market, and by integrating efficiency-boosting innovations into company operations.

Local Labour Market Profile

Demographic Characteristics - The city of Kingston has experienced modest population growth in the last ten years, though it lags behind the Province of Ontario. Between the Census years of 2001 and 2011, the city added 9,165 residents (114,180 in 2001 and 123,345 in 2011) for a growth rate of 8.0% and is slated for continued modest growth through to 2026 with a projected population of 147,000.

There is a clear indication of an aging population in Kingston and Ontario. Moving forward, Kingston will increasingly have to confront the demands of an aging population on the labour force. This trend can be attributed to the aging of the baby boomer cohort that will place pressures on the labour force in terms of service delivery for an older population and the increased need for business succession planning.

The influx of immigrants, in addition to adding to the cultural and ethnic diversity of the population, is also becoming a key element for driving employment growth. The Kingston Immigration Partnership research identifies this need to attract and integrate immigrants to the Kingston area. Approximately 14% of Kingston residents were immigrants in 2006, which was considerably lower than Ontario (28%) and Canada (20%). The city of Kingston receives approximately 380 new permanent residents per year, which has been relatively constant since 2000. The population base of most European-origin communities in Kingston has been steady or declining historically, while more recent immigrants are arriving from Asia, the Middle East, Central and South America.

The city has a well-educated, 'working age' population. One-third (33%) of this population has a university degree and an additional one-quarter (24.5%) hold a college diploma, in both instances at higher rates than the provincial percentages. This trend is likely attributed to the large post-secondary institution presence in the city. Education attainment is often used as a measure of competitive advantage, so Kingston's higher educational attainment rates, as compared to the province, is attractive to companies that rely on a well-educated and talented labour pool.

The three most common fields of study in the local labour force include health, parks, recreation and fitness followed by architecture, engineering and related technologies and business, management and public administration. This trend indicates a strong position for health related, professional services and finance & insurance related operations and enterprises. A university education in several occupations such as management, natural and applied sciences, health, social science, education, government service, religion, art, culture, recreation and sport is clearly important.

Labour Force Characteristics – The four largest industries in terms of number of residents in the labour force are:

- Health care and social assistance[1] (8,860 people or 14.7% of the labour force)
- Educational services (8,150 people or 13.5% of the labour force)
- Public administration (7,495 people or 12.4% of the labour force) and
- Retail trade (7,325 people or 12.1% of the labour force.

The three largest industries represent over 40% of the labour force and are also largely public sector industries. All four of the largest industries are proportionately higher than the province of Ontario. The only other industry out of the 20 industry classifications that has a proportionately higher resident labour force is the accommodation and food services industry. This can be attributed to Kingston serving as a regional commercial and business centre for Eastern Ontario. For ease of analysis, the 20 industries have been grouped in five industry sectors. The most common occupational categories are identified in the following table.

Public & Health Care Sector	Goods Producing and Distributing Sector	Population Supporting Sector	Tourism Related Sector	Other Service Based Sector
▪ Teachers and professors ▪ Occupations in protective services ▪ Nurse supervisors and registered nurses ▪ Professional occupations in health	▪ Construction trades ▪ Transportation equipment operators and related workers, excluding labourers ▪ Machine operators in manufacturing	▪ Retail salespersons and sales clerks ▪ Cashiers ▪ Clerical occupations and other sales and service occupations	▪ Sales and service occupations ▪ Occupations in food and beverage ▪ Chefs and cooks	▪ Clerical occupations ▪ Professional occupations in natural and applied sciences ▪ Sales and service occupations

[1] The health care and social assistance industry includes establishments providing medical care, health care practitioners, hospitals, nursing and residential care facilities, individual and family services, community food and housing, vocational rehabilitation services and child day-care services.

Only two occupations were noticeably lower in comparison to the province and could be considered gaps in the labour force. These occupations are:

- professionals in business and finance, which require a university degree and extensive professional training offered by respective associations and institutes, and
- mechanic which requires four years of apprenticeship training.

Employer Characteristics - In December 2011, there were an estimated 6,883 businesses in the city of Kingston. The largest concentrations were in: real estate and rental and leasing; professional, scientific and technical services; and retail trade.

All three of these industries are service based industries that require customer/client service and sales skills. There were very large numbers of establishments classified as indeterminate, or self-employed, in both the real estate and professional services industries.

Much of the employer establishment base is made up of small businesses with 1-4 employees or 5-9 employees. The number of establishments with more than 100 employees was limited to 82. These findings indicate a strong dependency on small business and entrepreneurs to create employment opportunities and generate wealth for the city. The key findings for each sector are presented in the following table.

Public & Health Care Sector	Goods Producing and Distributing Sector	Population Supporting Sector	Tourism Related Sector	Other Service Based Sector
▪ Mainly small businesses (physician offices) in the health care industry and large publicly funded institutions.	▪ Largely composed of small businesses in the construction industry and a large number of businesses varying in size in the distribution industries.	▪ Large numbers of self-employed people in real estate, retailers with fewer than 10 employees and other service based businesses.	▪ Largely composed of small business owners operating restaurants.	▪ Large numbers of self-employed business owners and small business owners.

Local Labour Demand – Generally, certain industries are poised to fare better than others in Kingston over the next five years. The labour demand outlook for occupations in industries is presented in the following figure.

Public & Health Care Sector	• Health care and social assistance - good • Educational services - limited or average • Public Administration - average
Goods Producing and Distributing Industries	• Agriculture, forestry, fishing and hunting - average • Mining and oil and gas extraction - good • Utilities - average • Construction - good/average • Manufacturing - limited or average • Wholesale trade - average • Transportation and warehousing - fair
Population Supporting Industries	• Retail trade - average • Information and cultural industries - average • Finance and insurance - average • Real estate and rental and leasing - average • Other services - average
Tourism Related Sector	• Arts, entertainment and recreation - average • Accommodation and food services - average
Other Industries	• Professional, scientific and technical services - average • Management of companies and enterprises - good • Administrative and support, waste management and remediation services - limited

Community Perspectives

In order to garner stakeholder input and perspectives related to the labour force in Kingston, key informant interviews were conducted during the study process. KEDCO developed a listing of the largest employers within the city of Kingston and twenty of these employers were interviewed as part of this research.

In order to engage a large number of community stakeholders and collect varying perspectives related to Kingston's current labour market issues, an online survey was also developed and circulated to local employers. SurveyMonkey, an online survey tool, was distributed electronically resulting in a participation of 110 local employer representatives.

The key challenges and insights identified through the consultation process were:

- Specialized professionals looking to relocate to the area need spousal employment opportunities
- Highly skilled and educated people leave Kingston for larger city centres
- Employers predict labour force needs over the short term (less than six months)
- Employers train using internal methods
- Participating employers are not anticipating a workforce shortage.

Framing Kingston's Labour Market Strategy

Three key priority areas have emerged through the analysis for which specific recommendations have been developed:

Educate the labour force about local employment prospects - The demographic shift that is occurring in the city is going to change the labour force composition. Many baby-boomers are within ten years of retiring, which will create not only opportunities for advancement as they exit, but also new employment opportunities for those transitioning into or already active within the labour market. Although employers indicated that they are not anticipating a workforce shortage over the short term, there are existing local employment opportunities for those educated or trained as professionals in business, finance and health care and in skilled trades. Many of the local employers who are hiring can predict their labour force needs over the short term (i.e. less than one year). A key priority is ensuring a strong, relevant communication strategy that promotes these opportunities to the local labour force.

Attract and retain the well-educated and skilled younger population - The city of Kingston is a medium sized city centre and offers limited employment opportunities within its geographic boundaries. Many specialized professionals who are attracted to Kingston for employment are oftentimes accompanied by their spouse or partner who is also active in the labour market and needing to secure employment. This is often challenging as they are also in a specialized field or they lack the local networks and contacts. If Kingston is to successfully attract talent that is in demand, there must be a focus on addressing this dual career family challenge.

The city of Kingston is also home to a distinguished university and a progressive college. Although it is unrealistic to expect all graduates to remain in the Kingston area after graduation, retaining more of the population who have graduated from these institutions will positively impact the city's competitive advantage.

Cultivate a culture of entrepreneurship - The city of Kingston has a very large segment of the business base that is small or medium sized (i.e. fewer than 50 employees). The results from the community consultations revealed that many local companies were founded by local entrepreneurs who either grew up in the city or went to university or college and stayed in Kingston. Small companies are also versatile and adaptive to new technologies and processes that keep them competitive. Support for small business development and cultivation for entrepreneurship within the city needs to be encouraged.

Labour Market Strategies – Recommended Actions

The labour market strategies and recommended actions are:

- **Promote the city of Kingston as a viable and exciting employment destination.**

1. Promote innovative businesses in Kingston that have wide market reach and utilize local talent.
2. Showcase local businesses that support continued learning and innovative compensation programs.
3. Create a sector awareness campaign that educates people in the labour force about local career opportunities.
4. Support the efforts from the Kingston Immigration Partnership (KIP) Council to attract, retain and integrate immigrants to the Kingston area.
5. Prepare a social media plan that profiles local employment opportunities and showcases business success stories directed to St. Lawrence College and Queen's University students.
6. Create educational forums or workshops for small businesses on employee recruitment practices and policies.
7. Address dual career family employment barriers by creating a single local resource database that can match skills/competencies with potential local employers.
8. Encourage major employers (both private and public), where appropriate, to provide spousal/partner employment policies where spouses/partners can apply to internal job postings.
9. Provide an evidence-based analysis of job vacancies on a regular basis to profile the City's opportunities.

- **Engage with youth and professionals about local employment and business opportunities.**

1. Create forums for engagement with specialized professionals and young student populations to promote interaction and knowledge exchange about hiring demands and skills in need in the business community.
2. Disseminate local labour market information to local secondary and post-secondary institutions.
3. Create a business case that validates the return on investment for local businesses that participate in work-college apprenticeship programs offered at St. Lawrence College.
4. Encourage Queen`s University to develop internship programs.

5. Create a team-centered approach to deliver interactive career planning presentations for local occupational opportunities that are directed to local secondary school students.
6. Create a social media campaign to communicate local occupational opportunities and training programs that are directed to youth.
7. Develop a campaign that encourages local businesses to provide scholarships and bursaries to local secondary school students who remain in Kingston and attend either Queen's University or St. Lawrence College.
8. Work collaboratively with secondary and post-secondary institutions to develop career profiles and pathways to employment, for occupations experiencing labour force gaps.

- **Create a local culture where entrepreneurship is encouraged and promoted.**

1. Create information-sharing forums between post-secondary institutions and the business community regarding innovative research and the application of this research to industry.
2. Maintain working relationships between KEDCO staff and representatives from the city`s post-secondary educational institution technology transfer offices to stay informed of new innovative businesses emerging from these institutions.
3. Develop a model for support to local business owners who are seeking succession planning as a means of retirement or selling their business.
4. Develop a stronger partnership with the Eastern Lake Ontario Regional Innovation Network (ELORIN) to encourage and support entrepreneurship, innovation, commercialization and investment into knowledge-based industries in the city.
    - Support funding applications, where appropriate, to facilitate business outreach and service delivery
    - Promote city success stories that have attracted investment or generated growth through use of the Network`s services.

1 Introduction

The Kingston Economic Development Corporation (KEDCO) has initiated this research project to assess current and forecasted labour market trends and opportunities. This report informs KEDCO staff about local labour market situation and provides local strategies that are designed to strengthen labour recruitment, retention and planning. This report addresses Kingston's labour market needs and seeks to inform decision makers and influencers of the following:

- current employment gaps (job vacancies) and the factors influencing recruitment and attraction efforts;
- short-term employer labour needs and the qualities and skills being sought;

- longer-term forecasts for labour based on such influencing factors as projected retirements, industry turn-over rates, labour force churn (job gains to job losses to inform labour movement);
- national and provincial trends that may impact the ability of Kingston area employers to attract and retain talent and population.

This report is broken down into the following components:

- **Section 2.0 - Situational Analysis** assesses the national and provincial labour market including sector size and workforce development issues and challenges. Analysis of the local (i.e. city of Kingston) labour market and business profile to inform the local context for labour supply and demand is offered.
- **Section 3.0 – Community Perspectives** provides a review of results from the key informant consultations and online survey.
- **Section 4.0 – Framing Kingston's Labour Market Strategy** synthesizes the study findings in terms of key challenges identified through the labour market research and through the consultation process. This section describes three key emerging priorities that serve as the foundation for targeted actions to support labour market development.
- **Section 5.0 – Labour Market Strategies – Recommended Actions** provides a proactive strategy with recommended actions and implementation plan to address Kingston's labour market supply and demand situation.

2 Situational Analysis

2.1 National and Provincial Labour Market Outlook

2.1.1 National Outlook

Manpower's Employment Outlook Survey for the second quarter of 2012 was conducted by interviewing a representative sample of 1,900 employers in Canada. Canadian employers forecast a favourable hiring climate in the second quarter of 2012, with 21% of employers expecting to increase staffing levels, 5% predicting a decrease and 72% anticipating no change; the resulting Net Employment Outlook is +16%.

This stability and growth is contrasted with the downturn of the global economy catalyzed by the sovereign debt crisis in Europe and the continued turmoil in the Middle East. These events have led to a global slowdown marked by lower production in China and India, and a slow growth in the United States. Canada's economy, although affected with the most recent unemployment numbers showing a decrease of over 30,000 jobs in June[2], has remained favourable; since December 2009 Canadian employers have created over 260,000 full time jobs, replacing virtually the number of jobs lost during the recession.[3]

FIGURE 1: QUARTER UPDATES: MANPOWER HIRING OUTLOOK

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
2nd Quarter 2012	21%	5%	72%	2%	16%	13%
1st Quarter 2012	16%	10%	71%	3%	6%	14%
4th Quarter 2011	20%	8%	70%	2%	12%	13%
3rd Quarter 2011	26%	4%	68%	2%	22%	16%
2nd Quarter 2011	21%	5%	73%	1%	16%	13%

Source: Manpower Employment Outlook Survey Canada. Q2 2012

2 Statistics Canada. June Unemployment Rate Update.
3 Talent Mobility, Report of the proceedings from the Talent Mobility Symposium held December 3, 2010, Toronto, Ontario, http://www.cerc.ca/LinkClick.aspx?fileticket=V0Qr2yX835E%3D&tabid=212.

In terms of sector strengths, Canada saw the strongest hiring growth in the Construction sector with 27% of firms commenting that they are increasing their workforce - largely this growth can be rationalized through the second quarter as a seasonal adjustment. This growth will also be driven by ongoing construction demand. Growth will no longer be driven by federal and provincial infrastructure stimulus spending. The Mining sector and the transportation and public utilities sectors also saw a number of firms hiring staff with 26 percent of the mining sector and 25 percent of the transportation and public utilities sector of the firms surveyed increasing their number of staff. These sectors, like the construction sector, routinely see seasonal growth, however when adjusted for these seasonal increases, the sectors continue to perform well with an increase of 21 and 16 percent respectively.

FIGURE 2: SECOND QUARTER SECTOR HIRING

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook	Seasonally Adjusted
Construction	27%	5%	65%	3%	22%	15%
Education	11%	4%	83%	2%	7%	8%
Finance, Insurance & Real Estate	16%	5%	78%	1%	11%	9%
Manufacturing - Durables	24%	6%	68%	2%	18%	13%
Manufacturing – Non-Durables	18%	4%	77%	1%	14%	10%
Mining	26%	5%	67%	2%	21%	21%
Public Administration	18%	5%	72%	5%	13%	6%
Services	22%	4%	72%	2%	18%	15%
Transportation & Public Utilities	25%	6%	68%	1%	19%	16%
Wholesale & Retail Trade	19%	5%	74%	2%	14%	15%

Source: Manpower Employment Outlook Survey Canada. Q2 2012

Although the second quarter of 2012 has seen growth in hiring in all Canadian sectors, there were a number of trends that policy analysts and employers must remain cognizant of in order to continue to develop a labour force that promotes strong economic growth into the future.

An Aging Population

The impending retirement of the baby boomer generation over the course of the next decade, with fewer able workers available to replace them, presents Canada with the dilemma of significant skilled labour shortages. Many companies and sectors are already facing challenges in finding the human capital needed to support business operations and expansion[4]. The impact of the demographic shift could be severe, as the small and large businesses that sustain the livelihoods of Canadian families and communities are constrained to rely on a shrinking workforce to generate more economic output and support a burgeoning number of retirees[5].

The United States faces similar circumstances to Canada. Struggling with an unemployment rate of 8.1 per cent in August 2012, the rate decline is in part contributed to the withdrawal of people looking for work. Forecasts for the future project shortages of workers. To sustain economic growth, by 2030 the United States will need to add more than 25 million workers. Canada's labour force grew at an annual rate of 2.4% between 1965 and 2006; outperforming the United States at 1.8%.

In the Canadian context, immigration plays an increasingly important role. In addition to relying on immigration to support Canada`s economic growth, there is also a need to draw far more extensively on underutilized sources of labour in the labour force - large segments of the population that are relatively under-represented, or whose average unemployment rates are significantly higher than that of the general population. Consideration must be directed towards young people, older workers, the Aboriginal population and persons with disabilities.

[4] The Canadian Chamber of Commerce (2010). Canada's Demographic Crunch: Can Underrepresented Workers Save Us?
5 Ibid.

Underrepresented Segments of the Canadian Labour Force

Young people (ages 15 to 24) suffer from higher unemployment rates than other age groups. For example, as October 2012 the unemployment rate for the 15 to 24 age group for Canada was 14.7%; however, the unemployment rate for the 25-54 age groups was 6.0% and the 55 years and over group was 6.6%.[6] It is estimated that around one in five young people across Canada do not pursue post-secondary studies but rather transition from school directly to the workplace to work.[7] It is crucial that young people be able to work, though not at the expense of post-secondary studies upon which their long-term employability in the knowledge-based economy will depend. More needs to be done to allow students to work and study. Policymakers, by supporting flexible and cooperative educational programming in conjunction with local educational providers, can allow students to acquire the education and training needed to succeed in the workplace, while expanding their experiential learning experience.

People over the age of 60 are the fastest growing age group, and are living longer and healthier lives. Many want to continue working, and view work as part of their life balance. With their wealth of skills, knowledge and experience, older workers must be recognized as tremendous assets for businesses in their day-to-day operations and in transferring of human capital and knowledge of younger workers.

Aboriginal peoples are the fastest growing segment of the Canadian population, and yet overall, they continue to experience a lower economic standing, higher unemployment, lower educational achievement and under-representation in the knowledge-based economy workforce, relative to non-Aboriginals.

Skilled Labour and Productivity

With fewer skilled workers, it becomes necessary for Canadian businesses to boost their labour productivity. Canada's overall record on business sector productivity compared to the United States has spread. Canada's productivity was 78 per cent of that of the United States in 2008, down from 90 per cent in the early 1980. Achieving an increase in productivity will be very difficult. More Canadian businesses must boost productivity growth through greater investment in capital equipment and new technologies, research and development (R&D), adoption of international best practices and human capital formation in the workplace at the managerial and sub-managerial levels. Increased productivity is achieved through the bringing of new, innovative goods and services to market, and by integrating efficiency-boosting innovations into company operations. For smaller enterprises, productivity gains could be realized by scaling up on successful business operations.

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[6] Statistics Canada (2012), Labour Force information October 7 to 13, 2012, http://www.statcan.gc.ca/pub/71-001-x/71-001-x2012010-eng.pdf, last modified on November 2, 2012.
[7] Statistics Canada (2012), Labour Force Survey, CANSIM Table 282-0004 Labour Force Estimates, last modified December 5th, 2012.

2.1.2 Provincial Outlook

With a Net Employment Outlook of +13% Ontario employers predict a steady hiring pace in Q2 of 2012. Quarter-over-quarter, hiring prospects strengthen by 9%, but the Outlook is 2% weaker when compared with Q2 2011. There are a number of reasons why growth has slowed within Ontario over the past year including global economic slowdown and continued slow growth in the United States. Ontario is less insulated than some Canadian provinces to the global market and depends heavily on trade relationships with the United States and overseas partners to foster growth in the province.

Employers in all ten industry sectors forecast increased staffing for the coming quarter. The largest hiring plans are reported by Manufacturing – Durables sector, the Services sector and Transportation and Public Utilities sector, at +18%.

Employers in all 24 areas predict an increase in payrolls during the course of the next three months. The Outlook strengthens by 27% in Windsor and by 23% in both Northumberland County and Kingston. With Kingston having one of the highest forecasts throughout the province, the employment outlook for the city is favourable.

FIGURE 3: PROVINCIAL FORECAST IN STAFFING LEVELS BY INDUSTRY

	Increase	Decrease	No Change	Don't Know	Net Employment Outlook
All Industries	18%	5%	74%	3%	13%
Construction	23%	7%	65%	5%	16%
Education	10%	2%	87%	1%	8%
Finance, Insurance & Real Estate	17%	6%	76%	1%	11%
Manufacturing – Durables	22%	4%	72%	2%	18%
Manufacturing – Non-Durables	14%	5%	80%	1%	9%
Mining	18%	6%	73%	3%	12%
Public Administration	18%	2%	75%	5%	16%
Services	22%	4%	71%	3%	18%
Transportation & Public Utilities	23%	5%	68%	4%	18%
Wholesale & Real Estate	14%	5%	77%	4%	9%

Source: Manpower Employment Outlook Survey Canada. Q2 2012

The employment growth forecasts for the province are slow yet favourable. A number of key factors that are affecting Canada are also affecting Ontario. Ontario's population is aging; as the baby boomer generation advances into the age of retirement, there will be a significant decline in the proportion of the population in the prime working years. Using Ontario Ministry of Finance data, the projected shortfall in the availability of workers is shown to rise to at least 200,000 and to as high as 1.8 million by 2031, depending on levels of population growth.

At the same time as population is aging, the requirements of the labour market are changing. With the emergence of the knowledge economy, the proportion of the labour force requiring some form of education or training beyond high school will increase dramatically. Using a variety of Canadian and U.S. estimates, it is concluded that by 2031, 77% of the workforce will require post-secondary credentials. Currently 60% of the labour force meets this requirement, with just over 66% of youth achieving this.

The Province and local municipalities can proactively work with service providers to ensure that workers are well trained and that newcomers to Canada are attracted to settle in Ontario. Newcomers need support to transition to employment in their profession. Local municipalities including the City of Kingston must continue to support the local population and business community through attraction and retention of human capital, quality employment opportunities and quality of life amenities.

2.2 Local Labour Market Profile

This section examines the city of Kingston's labour market characteristics as compared to the Province of Ontario. The profile examines:

- Demographic characteristics and educational attainment for the entire population
- Labour force characteristics
- Employer characteristics for the city of Kingston.

The profile includes Statistics Canada Census data from 2001, 2006 and 2011 and Canadian Business Patterns data for 2011.

2.2.1 Demographic Characteristics

The city of Kingston has experienced modest population growth in the last ten years, though it lags the Province of Ontario (Figure 2.1). Between the Census years of 2001 and 2011, the city added 9,165 residents for a growth rate of 8.0%. In comparison, the Province added 12.6% more residents during the same time period. Since 2006, the city's population has grown by 6,130 residents (5.0%) to a total of 123,345. The Province's population grew at a slightly higher rate of 5.4% over the same period.

The city is slated for continued modest growth through to 2026 when it is projected to have a population of 147,000 (medium projection).[8]

FIGURE 4: COMPARATIVE POPULATION GROWTH, 2001-2011

	2001	2006	2011	2001-2011 (10 Year Net Increase)	2001-2011 % Change	2006-2011 (5 Year Net Increase)	2006-2011 % Change
City of Kingston	114,180	117,215	123,345	9,165	8.0%	6,130	5.0%
Province of Ontario	11,410,030	12,160,290	12,851,830	1,441,800	12.6%	691,540	5.4%

Source: Statistics Canada, Census of Population (2001, 2006, 2011).

The following figure indicates the age structure of the population in the city and province. In 2001, the largest age demographic was the population under the age of 14 years (19,600) followed by the population 15-24 years (17,065). This signifies a relatively younger population base. Over the course of the ten year period, the population over 65 years of age (20,335) has become the largest demographic in Kingston followed by the population 15-24 years of age (19,040). The age population under the age of 14 years has declined over the course of 10 years, similar to the province and the age groups 45-49 have increased in each five year increment, similar to the province.

FIGURE 5: COMPARATIVE POPULATION BY AGE, 2001-2011

	City of Kingston						Province of Ontario					
	2001		2006		2011		2001		2006		2011	
	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total	No.	% of Total
0-14 years	19,600	17.2%	18,485	15.8%	18,095	14.7%	2,232,750	19.6%	2,210,800	18.2%	2,180,770	17.0%
15-24	17,065	14.9%	17,295	14.8%	19,040	15.4%	1,487,835	13.0%	1,630,370	13.4%	1,716,545	13.4%
25-29	7,800	6.8%	8,215	7.0%	9,165	7.4%	729,655	6.4%	743,695	6.1%	815,120	6.3%
30-34	7,895	6.9%	6,960	5.9%	7,825	6.3%	828,840	7.3%	791,960	6.5%	800,365	6.2%
35-39	9,160	8.0%	7,620	6.5%	7,025	5.7%	989,840	8.7%	883,985	7.3%	844,335	6.6%
40-44	9,090	8.0%	9,260	7.9%	7,855	6.4%	969,670	8.5%	1,032,415	8.5%	924,075	7.2%
45-49	8,265	7.2%	9,070	7.7%	9,510	7.7%	859,130	7.5%	991,970	8.2%	1,055,880	8.2%
50-54	7,600	6.7%	8,250	7.0%	9,030	7.3%	776,145	6.8%	869,405	7.1%	1,006,140	7.8%
55-59	5,975	5.2%	7,545	6.4%	8,100	6.6%	584,495	5.1%	774,525	6.4%	864,620	6.7%
60-64	4,840	4.2%	5,980	5.1%	7,365	6.0%	479,500	4.2%	581,980	4.8%	765,655	6.0%
65 years and over	16,890	14.8%	18,535	15.8%	20,335	16.5%	1,472,170	12.9%	1,649,185	13.6%	1,878,325	14.6%

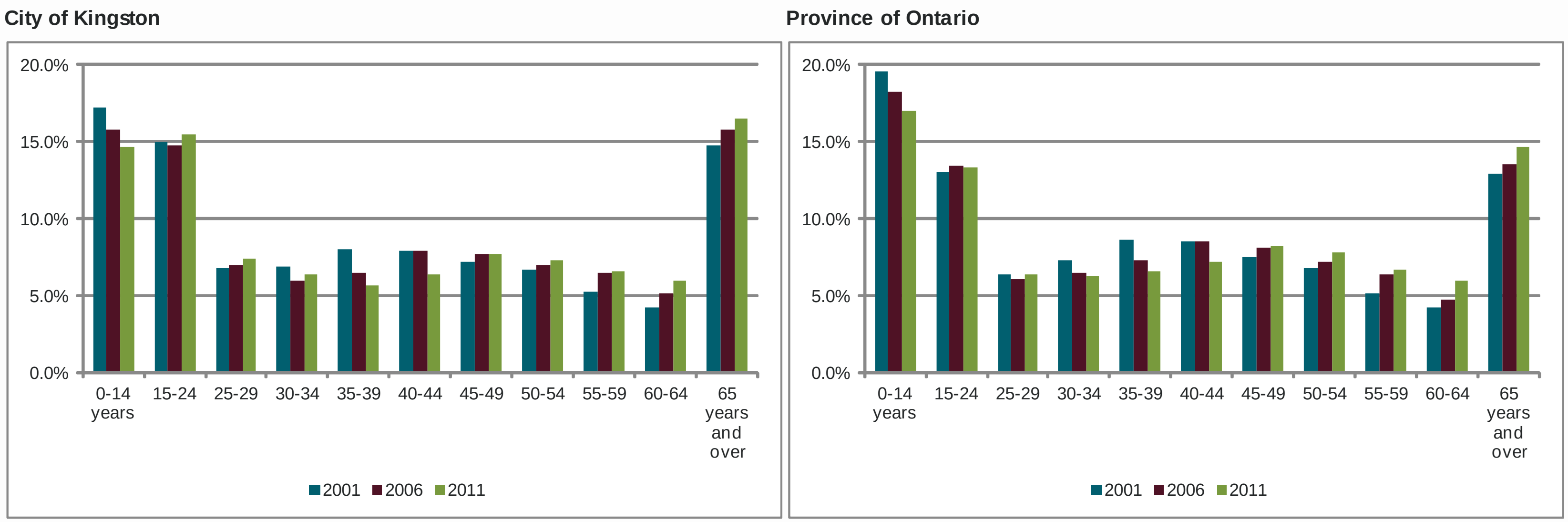
Source: Statistics Canada, Census of Population (2001, 2006, 2011).

[8] *City of Kingston Urban Growth Strategy – Final Report*, completed by J.L. Richards & Associates Limited, July 2004.

The same population numbers are presented in the following figures as proportions of the population. The figure provides a clear indication of an aging population in Kingston and Ontario. Moving forward, it becomes clear that Kingston will increasingly have to confront the demands of an aging population on the types of services and products available in the local market and the required workforce. This trend can be attributed to the aging of the baby boomer cohort and will place pressures for the labour force in terms of labour force service delivery for an older population and business succession planning.

The age demographic for the city of Kingston that shows greatest potential for the labour market is the 15-24 age groups. It has increased in proportion to the total population over the ten year time period. The increase is likely driven by the student population at Queen's University, Royal Military College and St. Lawrence College.

FIGURE 6: COMPARATIVE POPULATION BY AGE, % OF THE TOTAL POPULATION, 2001-2011



Source: Statistics Canada, Census of Population (2001, 2006, 2011).

It is clear that the population in Ontario and Canada is becoming increasingly multicultural. The influx of immigrants from countries outside of the Britain and Western Europe are adding to the cultural and ethnic diversity of the population. Immigration is becoming increasing critical for driving employment growth in the country. Statistics Canada has estimated that all net labour force growth for the county will be attributable to immigration as of 2011. The Kingston Immigration Partnership has recognized this need to attract and integrate immigrants to the Kingston area. The immigration research revealed that approximately 14% of Kingston residents were immigrants in 2006. This percentage was considerably lower than Ontario (28%) and Canada (20%). The research also states that Kingston, receives approximately 380 new permanent residents per year, which has been relatively constant since 2000.[9]

The Kingston Immigration Partnership also reported on the changing patterns of immigrant communities. The population base of most European-origin communities in Kingston has been steady or declining historically, while more recent immigrants are arriving from Asia, the Middle East, Central America and South America. Countries such as China, South Korea, the Philippines, India and Pakistan have been top source countries for Kingston.[10] The identification of common goals and objectives across the two strategies will further strengthen the integration of immigrants and a more cohesive labour force development approach from the community.

Educational attainment is one of the most important socio-economic indicators to consider in evaluating a community's labour market growth potential, as it speaks directly to its ability to staff new and existing local businesses. This has taken on increasing importance in recent years, as the goods-producing segment of the economy has begun to recede in favour of a knowledge-based economy. While a goods-producing economy and a knowledge-based economy are not exclusive categories, what is clear is that some level of post-secondary education will be essential for jobs that offer greater financial opportunity.

The following figure illustrates that the city has a well-educated, 'working age' population. One-third (33%) of this population has a university degree and an additional one-quarter (24.5%) have a college diploma, both higher than the province of Ontario proportions (30.7% and 22.0% respectively). The trend is likely attributed to the large post-secondary institution presence in the city. Education attainment is often used as a measure of competitive advantage, so Kingston’s higher educational attainment rates, as compared to the province, is attractive to companies that rely on a well-educated and talented labour pool.

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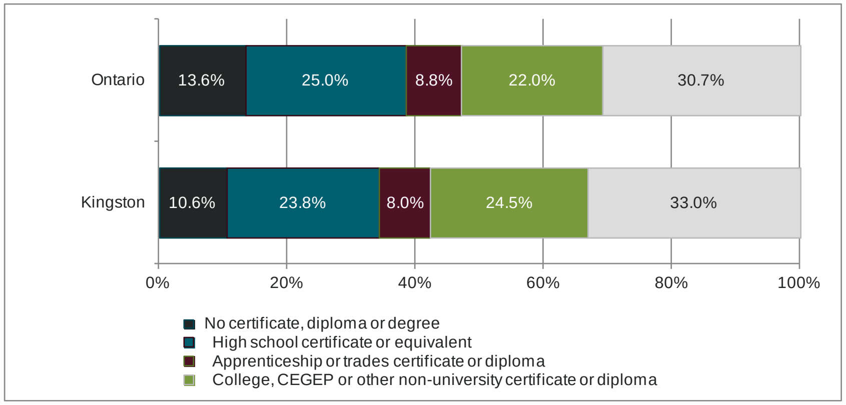
[9] Kingston Immigration Partnership, http://kipcouncil.ca/strategy/context/immigration-to-kingston/, viewed on July 26th, 2012.

[10] Ibid.

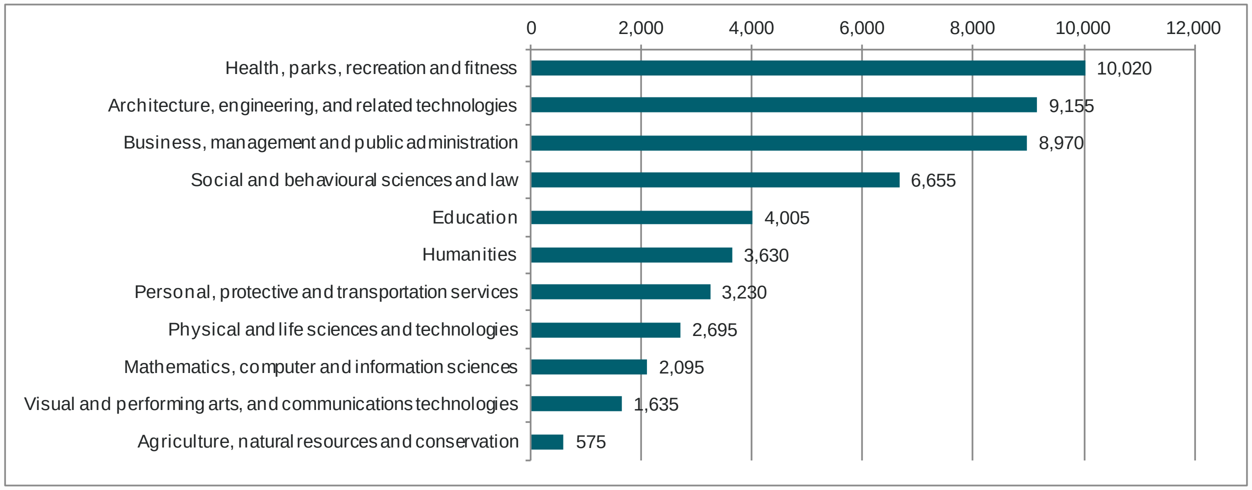
FIGURE 7: COMPARATIVE EDUCATIONAL ATTAINMENT, POPULATION AGED 25 TO 64, 2006



Source: Statistics Canada, Census of Population (2001, 2006, 2011).

The following figure builds upon this educational attainment rate by indicating the predominant field of study among educated residents in the city. Health, parks, recreation and fitness is followed by architecture, engineering and related technologies and business, management and public administration as the three most common fields of study in the local labour force. This trend indicates a strong position for health related, professional services and finance & insurance related operations and enterprises. Many of these residents may be utilizing their skills in other jobs or work outside of the city. These dynamics will be explored in greater detail in the following labour force characteristics sub-section.

FIGURE 8: EDUCATION BY FIELD OF STUDY, CITY OF KINGSTON, 2006



Source: Statistics Canada, Census of Population (2001, 2006, 2011).

The following figure highlights the most common educational attainment by occupation and age. The results from this table indicate a clear importance of a university education in several occupations such as management, natural and applied sciences, health, social science, education, government service and religion, art, culture, recreation and sport. In addition, there is a movement towards higher educational attainment by younger segments of the population. It is common for younger segments (i.e. 25-34 and 35-44 years) of the labour force to have college diplomas in business, finance and administration occupations, occupations in the primary industry and occupations in processing, manufacturing and utilities whereas older segments of the labour force typically have high school diplomas. For the younger segments of the labour force with only a high school diploma, they are commonly in sales and service occupations or to a lesser extent trades, transport and equipment operators and clerical occupations.

FIGURE 9: MOST COMMON EDUCATIONAL ATTAINMENT BY OCCUPATION TYPE AND AGE, CITY OF KINGSTON, 2006

Occupation Type	25 to 34 years	35 to 44 years	45 to 54 years	55 to 64 years
A Management occupations	University certificate or degree	University certificate or degree	University certificate or degree	University certificate or degree
B Business, finance and administrative occupations	College, CEGEP or other non-university certificate or diploma	College, CEGEP or other non-university certificate or diploma	High school certificate or equivalent	High school certificate or equivalent
C Natural and applied sciences and related occupations	University certificate or degree	University certificate or degree	University certificate or degree	University certificate or degree
D Health occupations	University certificate or degree	College, CEGEP or other non-university certificate or diploma	University certificate or degree	College, CEGEP or other non-university certificate or diploma
E Occupations in social science, education, government service and religion	University certificate or degree	University certificate or degree	University certificate or degree	University certificate or degree
F Occupations in art, culture, recreation and sport	University certificate or degree	University certificate or degree	University certificate or degree	University certificate or degree
G Sales and service occupations	High school certificate or equivalent	High school certificate or equivalent	High school certificate or equivalent	High school certificate or equivalent
H Trades, transport and equipment operators and related occupations	High school certificate or equivalent	Apprenticeship or trades certificate or diploma	High school certificate or equivalent	Apprenticeship or trades certificate or diploma
I Occupations unique to primary industry	College, CEGEP or other non-university certificate or diploma	High school certificate or equivalent	High school certificate or equivalent	High school certificate or equivalent
J Occupations unique to processing, manufacturing and utilities	College, CEGEP or other non-university certificate or diploma	High school certificate or equivalent	High school certificate or equivalent	High school certificate or equivalent

Source: Statistics Canada, Census of Population (2006).

2.2.2 Labour Force Characteristics

This section provides an assessment of the city's labour force composition by industry and occupation. The most recent labour force data that is available for the City of Kingston is from Statistics Canada's 2006 Census. The largest proportions of the labour force are highlighted in the following figure. The four largest industries in terms of number of residents in the labour force are as follows:

- Health care and social assistance[11] (8,860 people or 14.7% of the labour force)
- Educational services (8,150 people or 13.5% of the labour force)

[11] The health care and social assistance industry includes establishments providing medical care, health care practitioners, hospitals, nursing and residential care facilities, individual and family services, community food and housing, vocational rehabilitation services and child day-care services.

- Public administration (7,495 people or 12.4% of the labour force) and
- Retail trade (7,325 people or 12.1% of the labour force.

The three largest industries represent over 40% of the labour force and are also largely public sector industries. All four of the largest industries are proportionately higher than the province of Ontario. The only other industry that has a proportionately higher resident labour force is the accommodation and food services industry. This can be attributed to Kingston serving as a regional commercial and business centre for Eastern Ontario.

FIGURE 10: LABOUR FORCE BY INDUSTRY, CITY OF KINGSTON, 2006

	City of Kingston		Province of Ontario	
Industry (NAICS)	Total No.	% of Total Labour Force	Total No.	% of Total Labour Force
11 Agriculture, forestry, fishing and hunting	335	0.6%	114,345	1.8%
21 Mining and oil and gas extraction	60	0.1%	25,445	0.4%
22 Utilities	255	0.4%	50,215	0.8%
23 Construction	3,055	5.1%	384,780	5.9%
31-33 Manufacturing	2,845	4.7%	899,670	13.9%
41 Wholesale trade	1,210	2.0%	307,465	4.7%
44-45 Retail trade	7,325	12.1%	720,230	11.1%
48-49 Transportation and warehousing	1,730	2.9%	307,480	4.7%
51 Information and cultural industries	1,055	1.7%	172,795	2.7%
52 Finance and insurance	1,760	2.9%	316,170	4.9%
53 Real estate and rental and leasing	1,235	2.0%	126,440	2.0%
54 Professional, scientific and technical services	2,875	4.8%	471,620	7.3%
55 Management of companies and enterprises	55	0.1%	8,440	0.1%
56 Administrative and support, waste management and remediation services	2,980	4.9%	314,005	4.9%
61 Educational services	8,150	13.5%	433,485	6.7%
62 Health care and social assistance	8,860	14.7%	611,740	9.4%
71 Arts, entertainment and recreation	1,200	2.0%	140,830	2.2%
72 Accommodation and food services	5,190	8.6%	414,970	6.4%
81 Other services (except public administration)	2,640	4.4%	303,515	4.7%
91 Public administration	7,495	12.4%	350,075	5.4%
Total	60,310	100%	6,473,715	100%

Source: Statistics Canada, Census of Population, 2006.

A useful complement to the previous examination of the city's labour force is a further assessment of the occupational composition within these industries. By examining the occupations within the industry, a better understanding can be gained of the type of work that people do and the skills within the industry. For ease of analysis, the 20 industries have been grouped into the following five key industry sectors:

- Public & Health Care Sector (includes health care and social assistance, education and public administration industries) – 40.6% of the labour force
- Goods Producing and Distributing Sector (includes agriculture, mining, utilities, construction, manufacturing, wholesale trade and transportation & warehousing industries) – 15.8% of the labour force
- Population Supporting Sector (includes retail trade, information and cultural industries, finance and insurance, real estate, rental and leasing, other services industries) – 23.2% of the labour force
- Tourism Related Sector (includes arts, entertainment and recreation and accommodation and food services industries) – 10.6% of the labour force
- Other Service-Based Sector (includes professional, scientific and technical services, management of enterprises, administrative and support, waste management and remediation services industries) – 9.8% of the labour force.

Public & Health Care Sector – The following figure shows the largest occupational composition of the public sector driven industries for Kingston and Ontario in 2006. The most common occupational categories were:

- Teachers and professors (4,610 people or 57% of the industry total) – driven by the presence of three post-secondary educational institutions, but similar in proportion to the province.
- Occupations in protective services (1,985 people or 26% of the industry total) – driven by the presence of the federal penitentiaries and much higher than the province proportion.
- Nurse supervisors and registered nurses (1,535 people or 17% of the industry total) – similar size in comparison to the province proportion.
- Professional occupations in health (1,290 people or 15% of the industry total) – a considerably higher proportion in comparison to the province proportion of 10%.

For Kingston, the single occupation in this category that was considerably lower than the provincial proportion was among paralegals, social services workers and occupations in education and religion in the health care industry, which was at 10% in Kingston versus 14% across the province. However, the recent provincial and federal austerity measures suggest that there will be limited demand for additional people in the labour force with these skills.

FIGURE 11: PUBLIC & HEALTH CARE SECTOR, MOST COMMON OCCUPATIONS, 2006

	City of Kingston			Province of Ontario		
Industry (NAICS)	Most Common Occupations	Total No.	% of Industry Labour Force	Most Common Occupations	Total No.	% of Industry Labour Force
Health care and social assistance (62)		**8,860**			**611,740**	
	D1 Nurse supervisors and registered nurses	1,535	17%	D1 Nurse supervisors and registered nurses	95,805	16%
	D0 Professional occupations in health	1,290	15%	E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	83,460	14%
	E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	920	10%	D3 Assisting occupations in support of health services	75,625	12%
	B5 Clerical occupations	845	10%	D2 Technical and related occupations in health	59,220	10%
	D3 Assisting occupations in support of health services	840	9%	D0 Professional occupations in health	59,050	10%
Educational services (61)		**8,150**			**433,485**	
	E1 Teachers and professors	4,610	57%	E1 Teachers and professors	245,045	57%
	B5 Clerical occupations	480	6%	G8 Childcare and home support workers	34,600	8%
	G8 Childcare and home support workers	475	6%	G9 Sales and service occupations, n.e.c.	21,725	5%
Public administration (91)		**7,495**			**350,075**	
	G6 Occupations in protective services	1,985	26%	G6 Occupations in protective services	61,885	18%
	A3 Other managers, n.e.c.	1,070	14%	B5 Clerical occupations	59,075	17%
	B5 Clerical occupations	1,065	14%	E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	31,325	9%

Source: Statistics Canada, Census of Population, 2006.

Goods Producing and Distributing Sector – As the following figure indicates, there are a large number of common occupations across the goods producing and distributing sector including:

- Construction trades (1,265 people or 41% of the construction industry total). This occupation is larger in proportion to the province (31%).
- Transportation equipment operators and related workers, excluding labourers (975 people or 56% of the transportation and warehousing industry total). This occupation is also larger in proportion to the province (45%).
- Machine operators in manufacturing (470 people or 17% of the manufacturing industry).

The only occupations where there is a considerably smaller proportion of people in Kingston than the province proportion is among assemblers in manufacturing (5% in Kingston versus 16% in Ontario). The previous section indicated that the manufacturing industry accounts for a much smaller proportion of the labour force in Kingston (4.7%) than the Province of Ontario (13.9%). A great deal of restructuring has occurred across the manufacturing industry since 2006. The lower proportion of the economy employed in and reliant on manufacturing has likely been to Kingston's advantage during the economic slowdown.

FIGURE 12: GOODS PRODUCING AND DISTRIBUTING SECTOR, MOST COMMON OCCUPATIONS, 2006

	City of Kingston			Province of Ontario		
Industry (NAICS)	Most Common Occupations	Total No.	% of Industry Labour Force	Most Common Occupations	Total No.	% of Industry Labour Force
Agriculture, forestry, fishing and hunting (11)		**335**			**114,345**	
	I0 Occupations unique to agriculture, excluding labourers	210	63%	I0 Occupations unique to agriculture, excluding labourers	80,775	71%
	I2 Primary production labourers	60	18%	I2 Primary production labourers	5,980	5%
Mining and oil and gas extraction (21)		**60**			**25,445**	
	C0 Professional occupations in natural and applied sciences	25	42%	I1 Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers	6,370	25%
Utilities (22)		**255**			**50,215**	
	H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	45	18%	H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	8,355	17%
	B5 Clerical occupations	40	16%	B5 Clerical occupations	7,025	14%
Construction (23)		**3,055**			**384,780**	
	H1 Construction trades	1,265	41%	H1 Construction trades	119,110	31%
	H8 Trades helpers, construction, and transportation labourers and related occupations	335	11%	H8 Trades helpers, construction, and transportation labourers and related occupations	54,715	14%
Manufacturing (31-33)		**2,845**			**899,670**	
	J1 Machine operators in manufacturing	470	17%	J2 Assemblers in manufacturing	140,800	16%
	C0 Professional occupations in natural and applied sciences	310	11%	J1 Machine operators in manufacturing	138,140	15%
	C1 Technical occupations related to natural and applied sciences	250	9%	J3 Labourers in processing, manufacturing and utilities	81,605	9%
	J3 Labourers in processing, manufacturing and utilities	215	8%	B5 Clerical occupations	70,145	8%
	B5 Clerical occupations	190	7%	H3 Machinists, metal forming, shaping and erecting occupations	61,620	7%
	H3 Machinists, metal forming, shaping and erecting occupations	170	6%	C0 Professional occupations in natural and applied sciences	42,535	5%
	J2 Assemblers in manufacturing	150	5%	C1 Technical occupations related to natural and applied sciences	37,340	4%
	H4 Mechanics	135	5%	A3 Other managers, n.e.c.	32,770	4%
Wholesale trade (41)		**1,210**			**307,465**	
	G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	270	22%	B5 Clerical occupations	55,275	18%
	B5 Clerical occupations	165	14%	G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	51,230	17%
	A1 Specialist managers	150	12%	A1 Specialist managers	38,070	12%
	H7 Transportation equipment operators and related workers, excluding labourers	115	10%	H8 Trades helpers, construction, and transportation labourers and related occupations	16,395	5%
Transportation and warehousing (48-49)		**1,730**			**307,480**	
	H7 Transportation equipment operators and related workers, excluding labourers	975	56%	H7 Transportation equipment operators and related workers, excluding labourers	139,590	45%
	B5 Clerical occupations	345	20%	B5 Clerical occupations	58,260	19%

Source: Statistics Canada, Census of Population, 2006.

Population Supporting Sector – The population supporting sector is a service based sector. Common occupations in this sector for Kingston include retail salespersons and sales clerks, cashiers, clerical occupations and other sales and service occupations. Kingston's most common occupations are proportionately strong across the industries compared to the province. The only occupations that are lower in proportion to the province are professional occupations in business and finance (16% in Kingston versus 19% across Ontario) and mechanics (8% in Kingston versus 14% across Ontario).

The low proportions indicate a local labour market gap. These occupations will be explored later to determine the educational and training requirements.

FIGURE 13: POPULATION SUPPORTING SECTOR, MOST COMMON OCCUPATIONS, 2006

	City of Kingston			Province of Ontario		
Industry (NAICS)	Most Common Occupations	Total No.	% of Industry Labour Force	Most Common Occupations	Total No.	% of Industry Labour Force
Retail trade (44-45)		**7,325**			**720,230**	
	G2 Retail salespersons and sales clerks	2,415	33%	G2 Retail salespersons and sales clerks	223,570	31%
	G3 Cashiers	1,090	15%	A2 Managers in retail trade, food and accommodation services	101,710	14%
	G9 Sales and service occupations, n.e.c.	980	13%	G9 Sales and service occupations, n.e.c.	90,635	13%
	A2 Managers in retail trade, food and accommodation services	780	11%	G3 Cashiers	85,505	12%
Information and cultural industries (51)		**1,055**			**172,795**	
	B5 Clerical occupations	275	26%	B5 Clerical occupations	33,435	19%
	F0 Professional occupations in art and culture	210	20%	F0 Professional occupations in art and culture	23,815	14%
	F1 Technical occupations in art, culture, recreation and sport	140	13%	F1 Technical occupations in art, culture, recreation and sport	18,345	11%
Finance and insurance (52)		**1,760**			**316,170**	
	B5 Clerical occupations	580	33%	B5 Clerical occupations	91,340	29%
	B0 Professional occupations in business and finance	290	16%	B0 Professional occupations in business and finance	58,750	19%
	B1 Finance and insurance administrative occupations	245	14%	A3 Other managers, n.e.c.	33,360	11%
	A3 Other managers, n.e.c.	185	11%	B1 Finance and insurance administrative occupations	32,355	10%
Real estate and rental and leasing (53)		**1,235**			**126,440**	
	G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	270	22%	G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	30,825	24%
	B3 Administrative and regulatory occupations	210	17%	B3 Administrative and regulatory occupations	17,330	14%
	G2 Retail salespersons and sales clerks	110	9%	B5 Clerical occupations	13,195	10%
	G9 Sales and service occupations, n.e.c.	100	8%	G9 Sales and service occupations, n.e.c.	12,695	10%
	B5 Clerical occupations	75	6%	G2 Retail salespersons and sales clerks	9,920	8%
	A2 Managers in retail trade, food and accommodation services	70	6%	A3 Other managers, n.e.c.	6,800	5%
	A3 Other managers, n.e.c.	65	5%	A2 Managers in retail trade, food and accommodation services	5,480	4%
Other services (except public administration) (81)		**2,640**			**303,515**	
	G9 Sales and service occupations, n.e.c.	755	29%	G9 Sales and service occupations, n.e.c.	76,655	25%
	E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	225	9%	H4 Mechanics	41,795	14%
	G8 Childcare and home support workers	225	9%	G8 Childcare and home support workers	25,415	8%
	H4 Mechanics	220	8%	B5 Clerical occupations	21,545	7%

Source: Statistics Canada, Census of Population, 2006.

Tourism Related Sector – The tourism related sector is also a service based sector. For the city, the most common occupations in this sector are:

- sales and service occupations (1,960 people or 38% of the accommodation and food services industry)
- occupations in food and beverage (960 people or 18% of the accommodation and food services industry)
- chefs and cooks (895 people or 17% of the accommodation and food services industry).

With the exception of the occupations in food and beverage, the other occupations are proportionately similar or higher to the Province of Ontario's occupation proportions of the labour force.

FIGURE 14: TOURISM RELATED SECTOR, MOST COMMON OCCUPATIONS, 2006

	City of Kingston			Province of Ontario		
Industry (NAICS)	Most Common Occupations	Total No.	% of Industry Labour Force	Most Common Occupations	Total No.	% of Industry Labour Force
Arts, entertainment and recreation (71)		**1,200**			**140,830**	
	F1 Technical occupations in art, culture, recreation and sport	290	24%	F1 Technical occupations in art, culture, recreation and sport	27,145	19%
	F0 Professional occupations in art and culture	170	14%	F0 Professional occupations in art and culture	21,490	15%
	G7 Occupations in travel and accommodation, including attendants in recreation and sport	120	10%	G7 Occupations in travel and accommodation, including attendants in recreation and sport	17,890	13%
Accommodation and food services (72)		**5,190**			**414,970**	
	G9 Sales and service occupations, n.e.c.	1,960	38%	G9 Sales and service occupations, n.e.c.	131,525	32%
	G5 Occupations in food and beverage service	960	18%	G5 Occupations in food and beverage service	86,225	21%
	G4 Chefs and cooks	895	17%	G4 Chefs and cooks	68,735	17%

Source: Statistics Canada, Census of Population, 2006.

Other Service Based Sector – This sector of the labour force accounts for the remaining serviced-based industries. The most common occupations in Kingston are clerical occupations in the respective industries. Professional and technical occupations in natural and applied sciences, judges, lawyers, social workers, ministers of religion and policy and program officers are all well represented, when compared to the province. The only occupations that have a lower representation in the city when compared to the province are professionals in business and finance at 9% compared to 11%.

FIGURE 15: OTHER SERVICE BASED SECTOR, MOST COMMON OCCUPATIONS, 2006

	City of Kingston			Province of Ontario		
Industry (NAICS)	Most Common Occupations	Total No.	% of Industry Labour Force	Most Common Occupations	Total No.	% of Industry Labour Force
Professional, scientific and technical services (54)		**2,875**			**471,620**	
	C0 Professional occupations in natural and applied sciences	680	24%	C0 Professional occupations in natural and applied sciences	107,750	23%
	E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	375	13%	B0 Professional occupations in business and finance	51,930	11%
	C1 Technical occupations related to natural and applied sciences	315	11%	B5 Clerical occupations	47,705	10%
	B0 Professional occupations in business and finance	265	9%	E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	39,605	8%
	B5 Clerical occupations	220	8%	C1 Technical occupations related to natural and applied sciences	38,805	8%
Management of companies and enterprises (55)		**55**			**8,440**	
	B3 Administrative and regulatory occupations	15	27%	B5 Clerical occupations	1,165	14%
Administrative and support, waste management and remediation services (56)		**2,980**			**314,005**	
	B5 Clerical occupations	985	33%	G9 Sales and service occupations, n.e.c.	63,390	20%
	G9 Sales and service occupations, n.e.c.	530	18%	B5 Clerical occupations	54,025	17%
	G6 Occupations in protective services	270	9%	I2 Primary production labourers	27,455	9%

Source: Statistics Canada, Census of Population, 2006.

The previous labour force analysis revealed strong occupational representation in many of Kingston's industries compared to the province of Ontario. Only two occupations were noticeably lower in comparison to the province and could be considered gaps in the labour force. These occupations are:

- professionals in business and finance, and
- mechanics,

The employment and skills requirements for these two occupations are outlined in the following figure. Professional occupations in business and finance require a university degree and extensive professional training offered by the respective associations/ institutes. A common employment requirement for mechanics is four years of apprenticeship training.

FIGURE 16: EMPLOYMENT AND SKILLS REQUIREMENTS BY OCCUPATIONS

Occupation	Employment Requirements
Professional in Business and Finance	▪ Chartered accountants require a university degree and • Completion of a professional training program approved by a provincial institute of chartered accountants and, depending on the province, either two years or 30 months of on-the-job training and • Membership in a provincial Institute of Chartered Accountants upon successful completion of the Uniform Evaluation (UFE). ▪ Certified general accountants and certified management accountants require a university degree and • Completion of a training program approved by the Society of Certified General Accountants or Society of Management Accountants and several years of on-the-job training *and* • Certified designation by the Certified General Accountants Association or the Society of Management Accountants. ▪ Auditors require education, training and recognition as indicated for chartered accountants, certified general accountants or certified management accountants *and* some experience as an accountant. Auditors may require recognition by the Institute of Internal Auditors. ▪ To act as a trustee in bankruptcy proceedings, auditors and accountants must hold a licence as a trustee in bankruptcy. Licensing by the provincial or territorial governing body is usually required for accountants and auditors practising public accounting. ▪ Specialists in Human Resources require a university degree or college diploma in a field related to personnel management, such as business administration, industrial relations, commerce or psychology or completion of a professional development program in personnel administration is required.

Source: Government of Canada, Working in Canada job bank search, http://www.workingincanada.gc.ca/report-eng.do?action=search_occupation, last modified July 17th, 2012, viewed on July 27th, 2012.

Occupation	Employment Requirements
Mechanics	▪ Automotive service technicians require: • Completion of a four-year automotive service technician apprenticeship program *or* • A combination of over four years of work experience in the trade and high school, college or industry courses in automotive technology is required to be eligible for trade certification. • Automotive service technician trade certification is compulsory. • Automotive service technician (fuel, electrical and electronic systems) and automotive service technician (transmission) trade certification/designation is compulsory. • Automotive service technician (steering, suspension and brakes) trade certification/designation is compulsory. • Interprovincial trade certification (Red Seal) is also available to qualified automotive service technicians. ▪ Mechanical repairers, motor vehicle manufacturing require: • Completion of secondary school • On-the-job training of two to three years is provided by employers. ▪ Truck and transport and truck-trailer mechanics require: • Completion of a four-year truck and transport mechanic or truck-trailer repair apprenticeship *or* • A combination of over four years of work experience in the trade and high school, college or industry courses in truck or heavy-duty equipment mechanics is required to be eligible for trade certification. • Truck and transport mechanic trade certification/designation is compulsory. • Truck-trailer repair trade certification/designation is compulsory in Ontario. • Interprovincial trade certification (Red Seal) is also available to qualified truck-trailer repairers and truck and transport mechanics.

Source: Government of Canada, Working in Canada job bank search, http://www.workingincanada.gc.ca/report-eng.do?action=search_occupation, last modified July 17th, 2012, viewed on July 27th, 2012.

2.2.3 Employer Characteristics

In December 2011, there were an estimated 6,883 businesses in the city of Kingston, as indicated in the following figure. The largest concentrations were in:

- Real estate and rental and leasing (887 establishments)
- Professional, scientific and technical services (884 establishments) and
- Retail trade (869 establishments)

All three of these industries are service based industries that require customer/client service and sales skills. There were very large numbers of establishments classified as indeterminate, or self-employed, in both the real estate and professional services industries. The indeterminate category accounts for over 3,000 (44%) establishments in the city, which is a sizable portion of the establishment base. When this category was removed, the largest concentrations of establishments were in:

- Retail trade (662 establishments)
- Health care and social assistance (543 establishments) and
- Other services (429 establishments).

All three of these industries are also service based industries that require customer/client service skills. Many of the sizable industries (i.e. concentration of greater than 100 establishments) are serviced based.

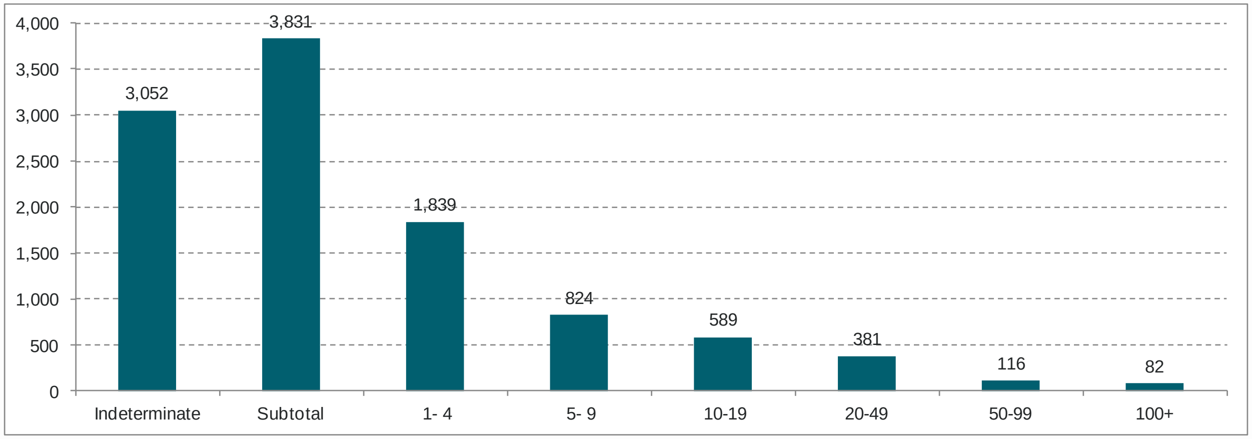
FIGURE 17: EMPLOYER ESTABLISHMENTS, CITY OF KINGSTON, DECEMBER 2011

Industry (NAICS)	December 2011 Total	Indeterminate	Subtotal
11 Agriculture, Forestry, Fishing and Hunting	51	28	23
21 Mining, Quarrying, and Oil and Gas Extraction	9	1	8
22 Utilities	9	3	6
23 Construction	697	280	417
31-33 Manufacturing	167	46	121
41 Wholesale Trade	235	79	156
44-45 Retail Trade	869	207	662
48-49 Transportation and Warehousing	196	94	102
51 Information and Cultural Industries	66	28	38
52 Finance and Insurance	441	276	165
53 Real Estate and Rental and Leasing	887	717	170
54 Professional, Scientific and Technical Services	884	510	374
55 Management of Companies and Enterprises	203	177	26
56 Administrative and Support, Waste Management and Remediation Services	282	113	169
61 Educational Services	115	52	63
62 Health Care and Social Assistance	694	151	543
71 Arts, Entertainment and Recreation	95	46	49
72 Accommodation and Food Services	362	60	302
81 Other Services (except Public Administration)	611	182	429
91 Public Administration	10	2	8
Total Economy	**6,883**	**3,052**	**3,831**
% of Total Establishments	**100.0%**	**44.3%**	**55.7%**

Source: Statistics Canada, Canadian Business Patterns Data, 2011.

As the following figure indicates, much of the employer establishment base is made up of small businesses with 1-4 employees (1,839 establishments) or 5-9 employees (824 establishments). The number of establishments with more than 100 employees was limited to 82 (1.2% of the total establishments). These findings indicate a strong dependency on small business and entrepreneurs to create employment opportunities and generate wealth for the city.

FIGURE 18: ESTABLISHMENTS BY SIZE, CITY OF KINGSTON, DECEMBER 2011



Source: Statistics Canada, Canadian Business Patterns Data, 2011.

A complement to the previous assessment and similar to the approach presented earlier for the city's labour force, is an examination of the 20 industries by the five key sectors: Public & Health Care Sector; Goods Producing and Distributing Sector; Population Supporting Sector; Tourism Related Sector; and Other Service-Based Sector. The establishment composition is presented in the following table, but the key findings for each sector are as follows:

- Public & Health Care Sector – Mainly composed of small businesses (driven by physician offices) in the health care industry and large publicly funded institutions.
- Goods Producing and Distributing Sector – Largely composed of small businesses in the construction industry and a large number of businesses varying in size in the distribution industries.
- Population Supporting Sector – Over 40% of the employer establishment base. Large numbers of self-employed people in the real estate industry, retailers with fewer than 10 employees and other service based businesses (e.g. automotive service repair, beauty salons, etc.).
- Tourism Related Sector – Largely composed of small business owners operating restaurants.
- Other Service-Based Sector – Large numbers of self-employed business owners and small business owners. However, there is good representation across establishment sizes for professional services and administrative and support industries.

FIGURE 19: EMPLOYER ESTABLISHMENTS, CITY OF KINGSTON, DECEMBER 2011

Industry (NAICS)	Total	Indeterminate	1- 4	5- 9	10-19	20-49	50-99	100+
Public & Health Care Sector								
61 Educational Services	115	52	29	14	7	5	2	6
62 Health Care and Social Assistance	694	151	342	95	60	26	5	15
91 Public Administration	10	2	0	3	1	0	1	3
Subtotal	**819**	**205**	**371**	**112**	**68**	**31**	**8**	**24**
% of Total Economy	**11.9%**	**6.7%**	**20.2%**	**13.6%**	**11.5%**	**8.1%**	**6.9%**	**29.3%**
Goods Producing and Distributing Sector								
11 Agriculture, Forestry, Fishing and Hunting	51	28	15	6	2	0	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	9	1	2	1	5	0	0	0
22 Utilities	9	3	1	1	0	2	2	0
23 Construction	697	280	200	99	68	41	8	1
31-33 Manufacturing	167	46	38	31	25	15	4	8
41 Wholesale Trade	235	79	61	38	28	21	6	2
48-49 Transportation and Warehousing	196	94	42	19	18	13	8	2
Subtotal	**1,364**	**531**	**359**	**195**	**146**	**92**	**28**	**13**
% of Total Economy	**19.8%**	**17.4%**	**19.5%**	**23.7%**	**24.8%**	**24.1%**	**24.1%**	**15.9%**
Population Supporting Sector								
44-45 Retail Trade	869	207	207	209	135	68	24	19
51 Information and Cultural Industries	66	28	13	9	5	5	5	1
52 Finance and Insurance	441	276	84	26	19	30	4	2
53 Real Estate and Rental and Leasing	887	717	117	24	16	9	3	1
81 Other Services (except Public Administration)	611	182	262	93	45	22	3	4
Subtotal	**2,874**	**1,410**	**683**	**361**	**220**	**134**	**39**	**27**
% of Total Economy	**41.8%**	**46.2%**	**37.1%**	**43.8%**	**37.4%**	**35.2%**	**33.6%**	**32.9%**
Tourism Related Sector								
71 Arts, Entertainment and Recreation	95	46	24	12	7	5	1	0
72 Accommodation and Food Services	362	60	59	55	71	80	31	6
Subtotal	**457**	**106**	**83**	**67**	**78**	**85**	**32**	**6**
% of Total Economy	**6.6%**	**3.5%**	**4.5%**	**8.1%**	**13.2%**	**22.3%**	**27.6%**	**7.3%**
Other Service-Based Sector								
54 Professional, Scientific and Technical Services	884	510	259	49	37	25	2	2
55 Management of Companies and Enterprises	**203**	**177**	**16**	**2**	**5**	**2**	**1**	**0**
56 Administrative and Support, Waste Management and Remediation Services	282	113	68	38	35	12	6	10
Subtotal	1369	800	343	89	77	39	9	12
% of Total Economy	**19.9%**	**26.2%**	**18.7%**	**10.8%**	**13.1%**	**10.2%**	**7.8%**	**14.6%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: Statistics Canada, Canadian Business Patterns Data, 2011.

2.3 Local Labour Demand

This sub-section of the report examines the local labour demand for employment opportunities for the occupations in the five key sectors. As the following figure demonstrates, the employment demand outlook for many of the occupations in Kingston's industries is 'average'. This outlook can be attributed to the province remaining in recovery mode from the economic recession which swept through much of the world's advanced economies.

Generally, certain industries are poised to fare better than others in Kingston over the next five years. Health care related and construction related occupations are in greatest demand. Labour demand in the health care related industries can be attributed to increased demand for health care services for an aging population base. Demand for labour in construction industries can be attributed to new or expanded infrastructure (e.g. roads, municipal services and utilities) to serve a growing population base in the London to Montreal transportation corridor. Industries with good employment demand outlooks are in mining and oil and gas extraction and management of companies and enterprises; however, there are not many residents in the labour force in these industries.

Industries where there will be limited employment demand are in educational services (e.g. elementary and secondary schools), manufacturing and administrative and support industries.

Further details for each of the common occupations by industry are provided in Appendix A.

FIGURE 20: GENERAL EMPLOYMENT DEMAND OUTLOOK FOR OCCUPATIONS IN INDUSTRIES, CITY OF KINGSTON

Public & Health Care Sector

- Health care and social assistance - good
- Educational services - limited or average
- Public Administration - average

Goods Producing and Distributing Industries

- Agriculture, forestry, fishing and hunting - average
- Mining and oil and gas extraction - good
- Utilities - average
- Construction - good/average
- Manufacturing - limited or average
- Wholesale trade - average
- Transportation and warehousing - fair

Population Supporting Industries

- Retail trade - average
- Information and cultural industries - average
- Finance and insurance - average
- Real estate and rental and leasing - average
- Other services - average

Tourism Related Sector

- Arts, entertainment and recreation - average
- Accommodation and food services - average

Other Industries

- Professional, scientific and technical services - average
- Management of companies and enterprises - good
- Administrative and support, waste management and remediation services - limited

Source: Millier Dickinson Blais Inc. using occupational data from Ministry of Training, Colleges and Universities, Ontario Job Futures Database, http://www.tcu.gov.on.ca/eng/labourmarket/ojf/findoccupation.asp , last modified June 24th, 2010, viewed on July 31st, 2012, Government of Canada, Working in Canada job bank search, http://www.workingincanada.gc.ca/report-eng.do?action=search_occupation , last modified on November 30th, 2011, viewed on July 31st, 2012.

3 Community Perspectives

3.1 Key Informant Interviews

In order to develop a comprehensive understanding of the labour force in Kingston, as well as to garner stakeholder input, key informant interviews were conducted during the study process. KEDCO developed a listing of the largest employers within the city of Kingston and a total of 20 participated in the key informant interview process (see Appendix B).

To accurately reflect the perspectives and input from this interview process, information is organized by the specific questions asked; however, the collection of responses is presented in aggregate form. This information represents the most common trends, themes and issues that were identified through the course of consultation.

What are the key advantages of Kingston's labour force?

A number of informants identified that the key advantages of Kingston's labour force are highly dependent on which industries and occupations are being discussed. There are a number of different factors that are important to specific industries and that policy and workforce planning organizations must understand that this diversity exists in Kingston. However, the key advantages included:

- **Proximity to high caliber education/training institutions and an educated workforce**: The fact that Kingston boasts three highly regarded post-secondary institutions (Queens University, St. Lawrence College and the Canadian Royal Military College) is Kingston's most important labour force advantage. Each of the respondents highlighted the importance these post-secondary institutions play in developing the local economy, particularly due to the abundance of skilled labour and highly educated people in the city.
- **A high degree of loyalty to employers and the city**: Many respondents identified that workers who were from Kingston are grateful to be able to work in the city and that the turnover rate in many occupations is generally low.
- **Affordability of labour:** Informants also identified that labour costs in Kingston are generally competitive with the surrounding area and comparable cities throughout Ontario.
- **Low cost of living:** The low cost of living and affordability of housing within the city of Kingston was highlighted as key labour market advantage.

Have there been any changes in any of these areas in recent times? How so?

There were generally two themes that emerged from this question. Key informants largely felt that either:

- There had been limited growth in innovative sectors and therefore, there were no businesses in the area to retain the available talent.
- Due to limited growth in innovative sectors there was an exodus of well-educated students and this had led to a shortage of labour within the city.

Firstly, there was tremendous sentiment from the private sector employers that there was a lack of innovative businesses in Kingston that could take full advantage of recent graduates from the post-secondary institutions. Many young people attend the post-secondary institutions only to leave to find work in larger metropolitan areas such as Montreal, Ottawa and Toronto. Informants highlighted that there was a lack of industry support for the local labour force and that businesses did not take full advantage of available partnerships with each of the institutions. Many informants cited that there should be continued outreach from industry to the educational organizations and vice versa in order to create synergies in industry and education, training and research at the universities and college.

With this being said, because of the exodus of students leaving Kingston shortly after graduation there are a number of occupational vacancies, particularly in the skilled trades. It is important to note that this trend seemed to only exist in certain sectors of the economy. Stakeholders who represented key public institutions like the hospitals and school boards, however, highlighted that there is very little turnover and they easily find workers to replace staff.

To what extent is the city's labour force cited as a concern or priority in your discussions with existing or potential businesses?

Similarly to the answers presented above, stakeholders highlighted that a lack of a specialized workforce, especially in the skilled trades, was a key concern expressed by businesses particularly in the construction and manufacturing sectors. There was concern expressed in regards to a lack of available highly specialized workers throughout additional sectors as well, including pharmacists, psychologists and upper level management. Many key informants noted that it was extremely difficult to attract these specialized occupations to the area due to a lack of opportunity for their spouses/partners. This issue along with the exodus of well-educated entry level workers from Kingston are clear impediments to the future economic growth of the city.

Do you feel that there are gaps in any area of the current labour force to meet current and future needs of the city?

The responses garnered from this question were diverse due to there being a diversity of sectors and perspectives within the city of Kingston. A number of stakeholders highlighted a lack of a specialized labour force including pharmacists, psychologists, upper level management and engineers as a major gap in the labour force as well as in the skilled trades. Some respondents also noted that it was particularly difficult to find workers who were fluently bilingual, as well as workers who possessed adequate training and experience in particular fields such as engineering and specialized medicine.

Are you using human resource tools as training programs to develop your workers?

Most respondents identified that they do not utilize training programs or human resource tools to develop their workers. Many noted that limited business support both from within their organizations as well as externally in the city were key impediments to training and building the skills of their workforce. In terms of organizations that do utilize training programs with their workers, these answers were specific and included:

- Computer training and sales training
- Virtual university programs
- Internal training programs for specific areas of improvement

Are educated and skilled workers leaving the Kingston area? Why? To Where?

Key informants highlighted that educated and skilled workers were leaving the city due to a lack of available appropriate employment opportunities. They identified that most of these workers seem to be leaving to find work in larger urban centres including Ottawa, Montreal and Toronto or returning to their hometown upon completion of their post-secondary programming. Key informants also highlighted that there seemed to be a large number of newly graduates heading west to Saskatchewan and Alberta to find work.

Largely it was highlighted that the city of Kingston lacks the industry needed to retain highly skilled and educated workers. Many informants noted that they felt the labour force has the ability to grow to accommodate specific industry because of the location of Queens, St. Lawrence and RMC but that the industry first needs to be attracted to the city of Kingston. This speaks to disconnect between the post-secondary programming available and its alignment with the local industry demand.

What factors do you think influence skilled workers to move to the Kingston area?

The quality of life in Kingston was highlighted by the majority of key informants as a key asset to worker attraction. Many respondents noted that the accessibility of nature, cottage life, boating and other outdoor recreational activities was extremely useful when employers were seeking to attract new employees to the area. The low cost of living was also highlighted by a number of stakeholders as a key attraction asset.

With this being said, a number of informants also highlighted that the only thing that would attract a large number of skilled workers to the area would be an influx of industry. Informants noted that there are a number of opportunities within the public sector in Kingston but limited opportunity for people in the private sector.

What kinds of training programs are available for local workers and businesses?

Businesses use a variety of training programming available to them. These programs include:

- SkillPath
- Professional executive development programs
- Industry specific training programs
- Government subsidized training programs
- Job Connect
- St. Lawrence College training programs

Are there any opportunities for businesses and training/education institutions to collaborate on their business needs?

A number of stakeholders identified that they specifically had working relationships with Queen's University or St. Lawrence College in terms of taking on cooperative education students and utilizing the educational institution's networks to attract employees. The majority of respondents, however, felt that more formalized arrangements between industry partners in the private sector could work to fuel growth in the economy and develop a number of jobs for recent graduates. The relationships developed by the public sector institutions including the hospitals are quite well established with both Queen's University and St. Lawrence College and these programs should continue to develop. However, in terms of relationships with private companies throughout the city, the key informants highlighted that the relationships are weaker and much less formalized. By collaborating with the private sector on specific programming ventures the post-secondary institutions can better work to create jobs in Kingston for their student base.

It is important to note that key informants did not believe that the Royal Military College had any formal or informal ties to businesses and organizations within the city in terms of cooperative education opportunities or internships.

In conclusion, what are your overall impressions on Kingston's labour force?

Many respondents noted that the labour force in Kingston does not have a lot of depth and that this was largely because of limited local sector opportunities. Respondents recognized that it would be beneficial for the city to have a more diverse economic base, which would attract people with unique skill sets to the area. Key informants noted that Kingston's labour market cannot retain the number of graduates from Queen's University let alone the additional post secondary institutions in the area. It is important that the post-secondary educational institutions pursue relationships with companies throughout the city to identify their specific industry needs and develop student skills sets for careers that align with local demand.

3.2 Online Survey

In order to engage a large number of community stakeholders and collect varying perspectives related to Kingston's current labour market issues, an online survey was developed and circulated to local employers. SurveyMonkey, an online survey tool, was used to collect responses. A total of 110 local representatives participated in the survey. A number of key questions relating to labour force trends, hiring practices, training and recruitment and labour attraction information were asked. The following responses have been summarized by question.

3.2.1 Current Labour Force Profile

Please rate Kingston's workforce in terms of:

Survey participants were asked to rate the availability of Kingston's workforce in terms of five key characteristics:

- Labour availability
- Educational attainment
- Professional or managerial skills
- Technical skills
- Work ethic

Generally speaking, Kingston's workforce overall rated good to fair in each category:

44% of indicating the availability of labour is good, 81% stating educational attainment is good or excellent,

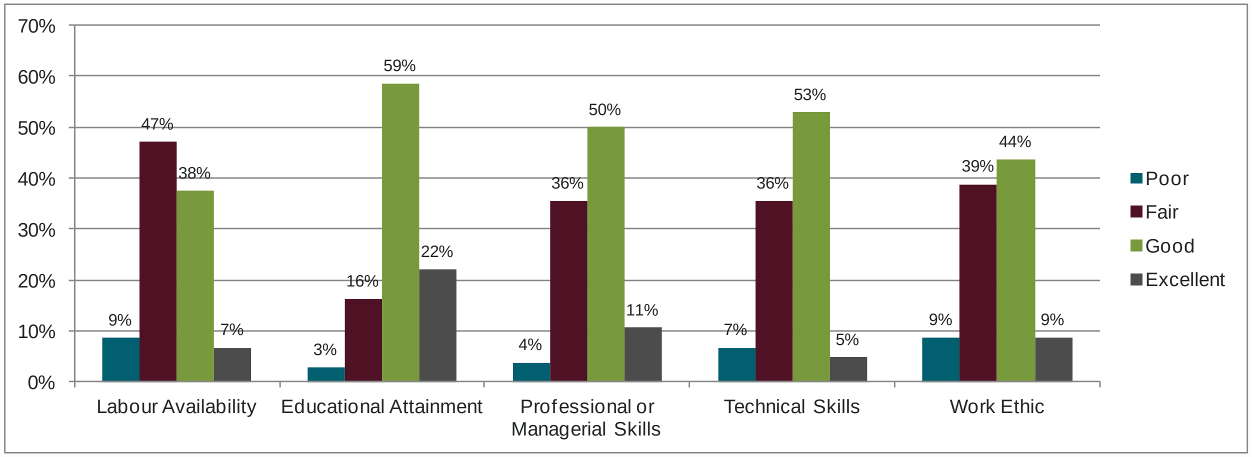
50% indicating availability of professional and managerial skills as good,

53% stated availability of technical skills is good,

39% and 44%$ indicated work ethic is fair or good respectively.

Respondents were most satisfied with the level of educational attainment in Kingston. This finding is in line with additional research and consultation that has been done throughout the project highlighting the importance of the post-secondary education institutions to Kingston's labour force.

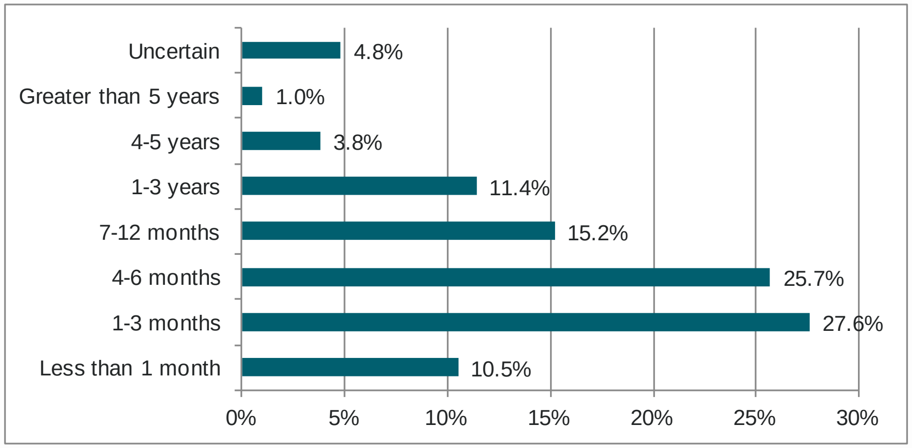
FIGURE 21 KINGSTON'S WORKFORCE RATINGS (PERCENTAGE OF RESPONDENTS)



How far in advance can you typically predict your workforce needs?

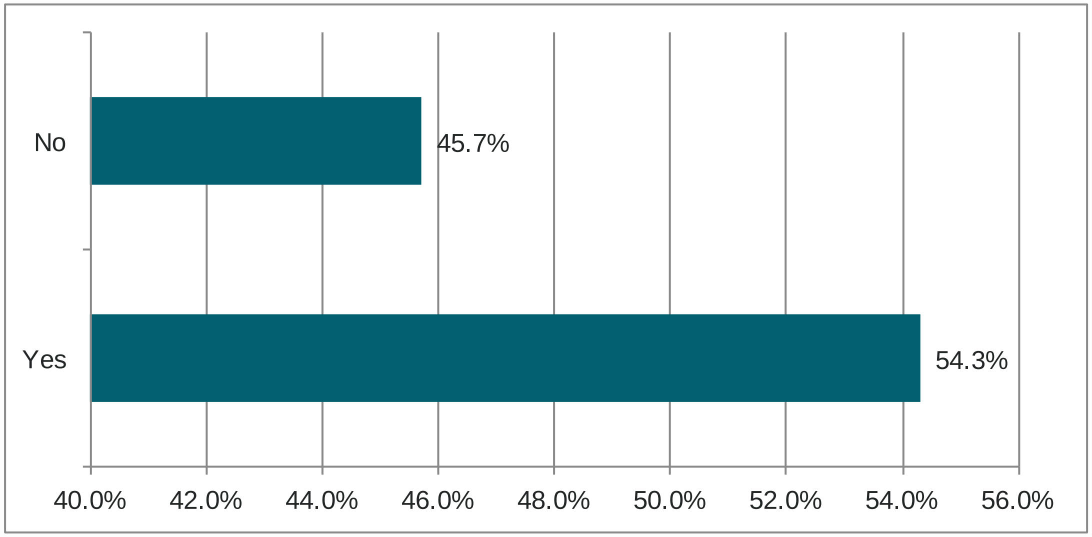
Respondents (25.7%) indicated they typically predict their workforce four to six months in advance with an additional 27.6% of respondents stating they predict their workforce needs one to three months in advance.

FIGURE 22 WORKFORCE NEEDS (PERCENTAGE OF RESPONDENTS)



Do you current have positions available within your organization?

FIGURE 23 ORGANIZATIONAL NEEDS (PERCENTAGE OF RESPONDENTS)



Currently 54.3% of respondents noted they had positions available within their organization.

If yes, please identify how many positions are currently available and what positions you are looking to fill.

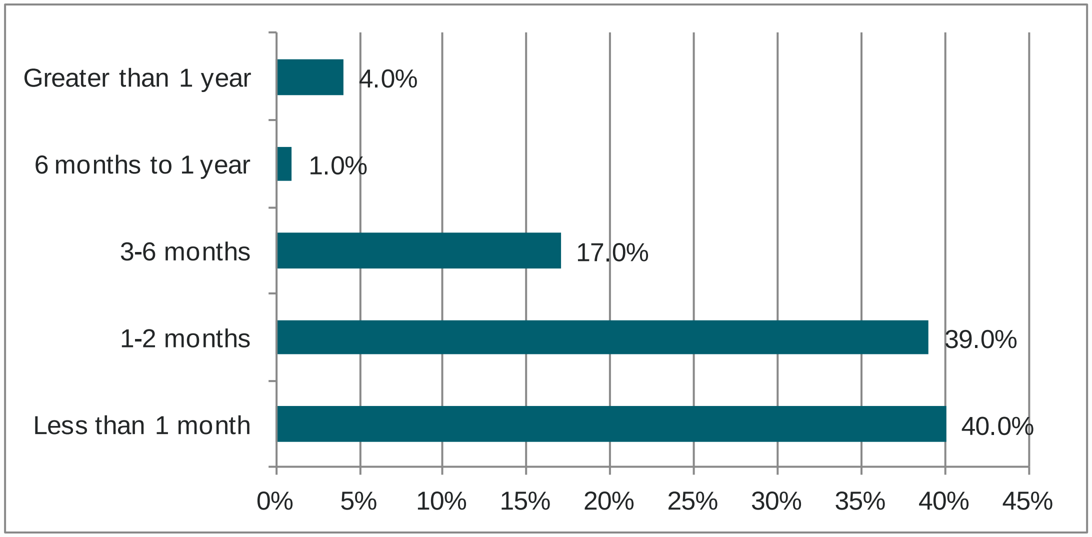
Responses to this question were extremely varied with the number of positions and aptitudes needed. Positions included business development analysts, engineers, store-front customer service, massage therapists and IT industry and web developers. In total nearly 200 jobs were specified as currently being vacant and in active recruitment. This indicates strong employment growth potential in Kingston's economy over the next year.

3.2.2 Current Training Profile

What is the average length of time that employment openings stay vacant?

Four of five respondents indicated that their employment openings stay vacant for less than two months (40.0% - less than 1 month, 39% - 1-2 months). A very small portion of employment openings stay vacant for more than 6 months.

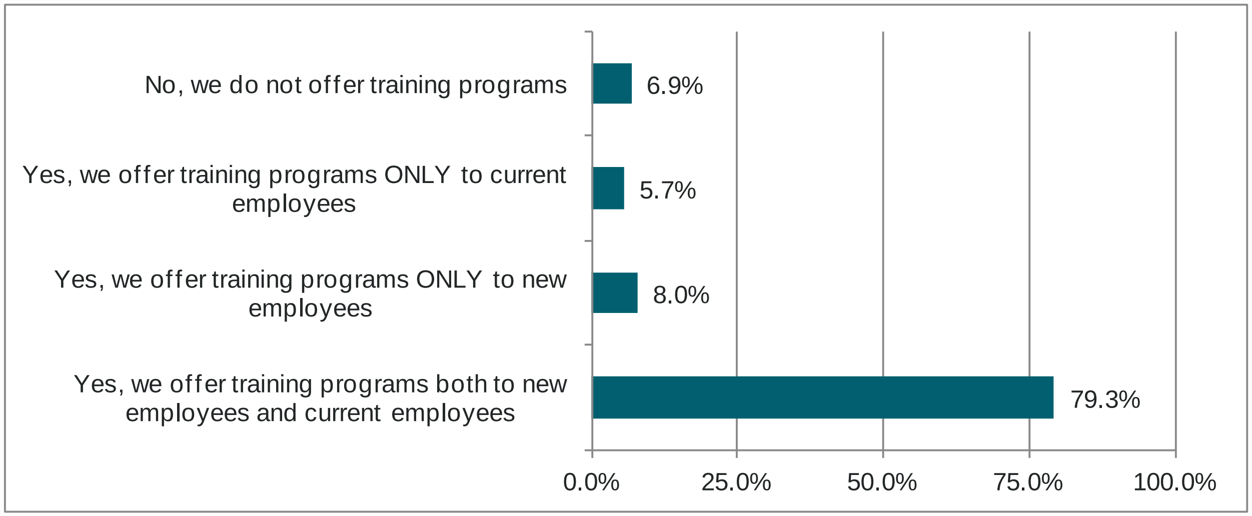
FIGURE 24 AVERAGE VACANCY DURATION (PERCENTAGE OF RESPONDENTS)



Do you currently offer training programs for your employees?

In terms of training, 79.7% of respondents identified that they provide training to both new and current employees with 6.9% not providing any training programs to their workforce.

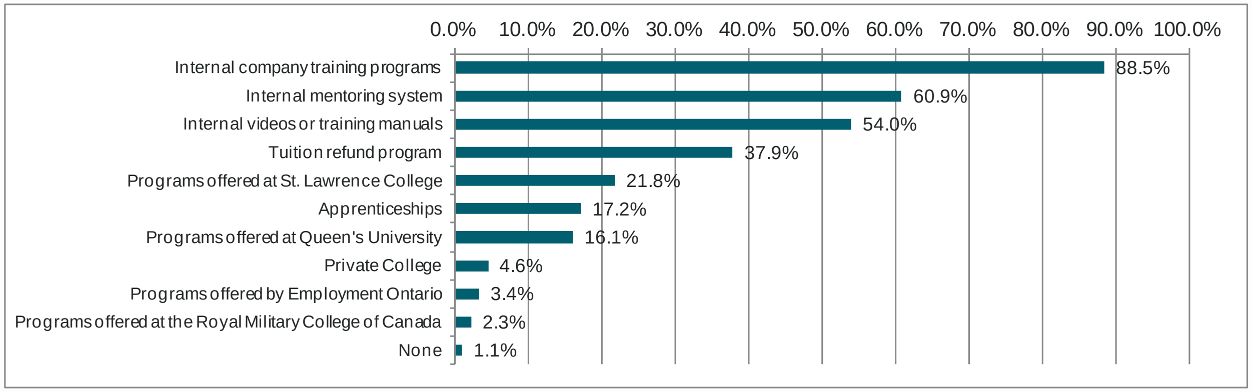
FIGURE 25 TRAINING PROGRAM OFFERINGS (PERCENTAGE OF RESPONDENTS)



Please indicate which formal training method(s) your company is currently using.

Internal training programs are the most common methods used by employers. Nearly nine of ten (88.5%) respondents noted that they provide internal company training programs to both current and new staff with an additional six of ten (60.9%) respondents noting that the company has internal mentoring systems that support additional training. Internal videos or training programs are also highly used (54.0%). These findings emphasize that most training being utilized by employers in Kingston is being developed internally, not uncommon in the private sector. Very few of the respondents indicated using Provincial training programs through Employment Ontario. Interestingly, it was found that businesses to a lesser extent use a tuition refund program (37.9%), programs offered at St. Lawrence College (21.8%) and programs offered at Queen’s University (16.1%), as a training tool for employees.

FIGURE 26 FORMAL TRAINING METHODS (PERCENTAGE OF RESPONDENTS)



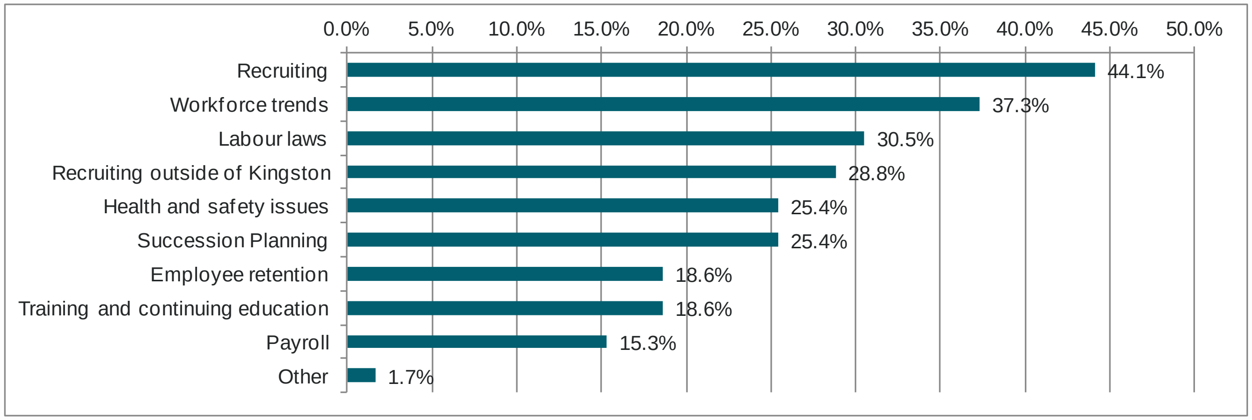
What types of training programs would benefit your company?

Largely companies are interested in having access to skills training related to customer service, marketing, sales, writing, social media, finance, first aid, labour laws, supervisory and management, IT and software development. Once again, the breadth of these varying skills shows the diversity of Kingston's economy and workforce.

For which human resources issues do you need information or support? Select all that apply.

The most common human resource issues that need further information or support are recruiting (44.1%) and workforce trends (37.3%). To a lesser extent, respondents need further information or support for labour laws (30.5%) and recruiting from outside of Kingston (28.8%). The responses show a clear and present need for increased human resources programs that inform local businesses of recruitment tactics, workforce trends and labour laws.

FIGURE 27: HUMAN RESOURCES ASSISTANCE (PERCENTAGE OF RESPONDENTS, SELECT ALL THAT APPLY)

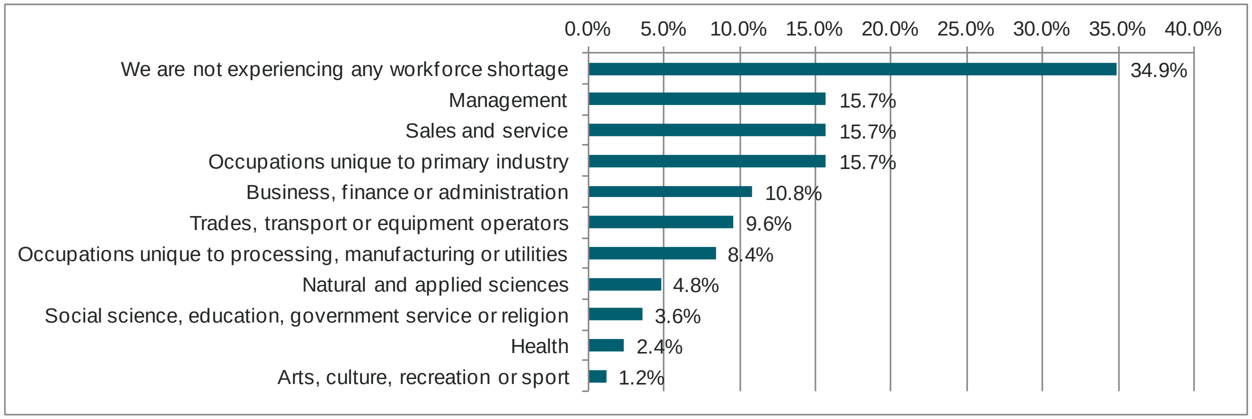


3.2.3 Workforce Needs

In which of the following categories are you currently experiencing a workforce shortage?

In terms of current workforce needs, over one-third (34.9%) of respondents noted that they are not currently experiencing workforce shortages. Occupations unique to primary industry, sales and service, and management have the highest demand with 15.7% of respondents identifying shortages in these areas.

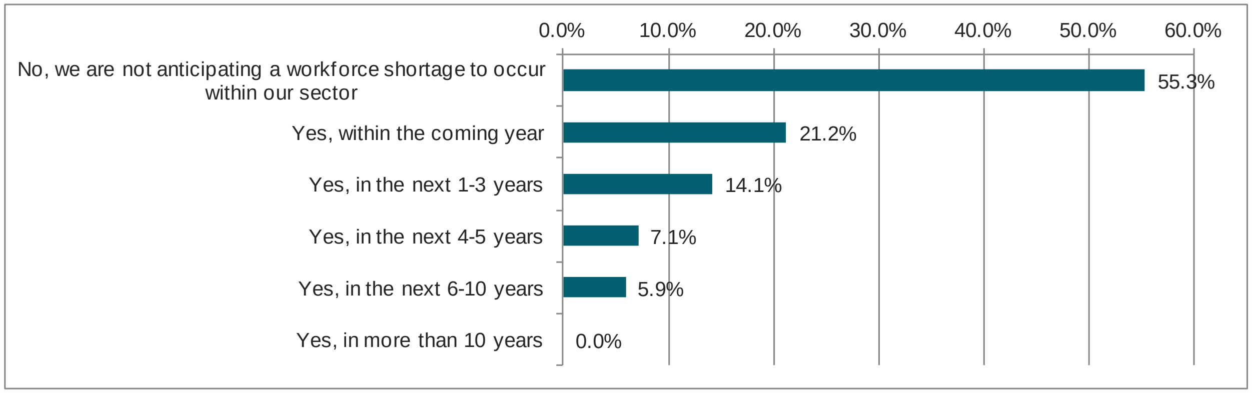
FIGURE 28 WORKFORCE NEEDS (PERCENTAGE OF RESPONDENTS)



Are you anticipating a workforce shortage to occur?

In terms of anticipated workforce shortages, over half (55.3%) of respondents are not anticipating any workforce shortage to occur in their sector. However, one of five (21.2%) do anticipate workforce shortages in the next year.

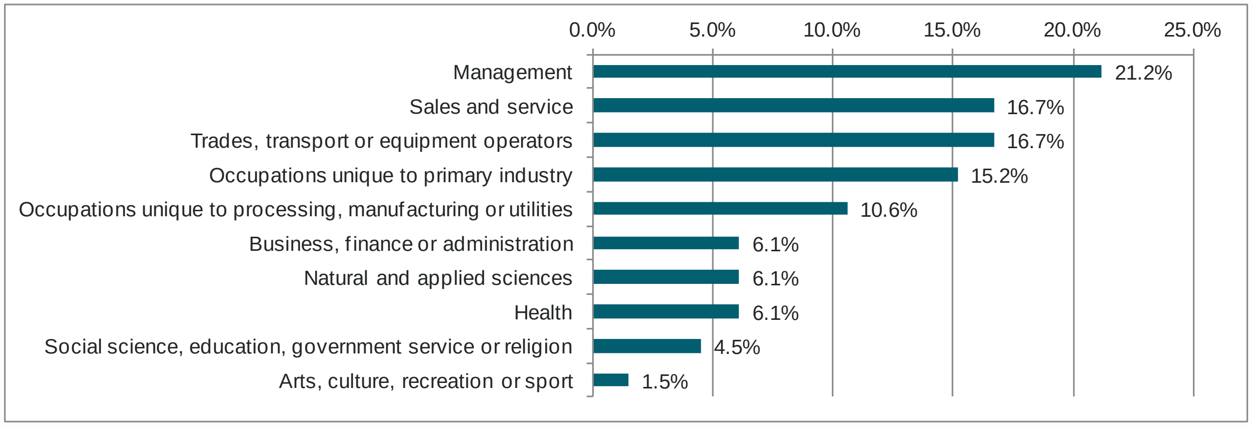
FIGURE 29 WORKFORCE SHORTAGE FORECASTING (PERCENTAGE OF RESPONDENTS)



In which of the following categories are you anticipating a workforce shortage?

Of the respondents anticipating a workforce shortage, 21.2% identified a shortage of management staff in the coming years. A lack of managerial staff is an immediate challenge in the city of Kingston and has been highlighted throughout both the key informant interviews as well as the online survey. In the survey, respondents also identified that they are expecting shortages in sales and service (16.7%), trades, transport or equipment operators (16.7%) and occupations unique to primary industry (15.2%).

FIGURE 30 ANTICIPATED WORKFORCE SHORTAGE (PERCENTAGE OF RESPONDENTS)



3.2.4 Employee Retention and Attraction

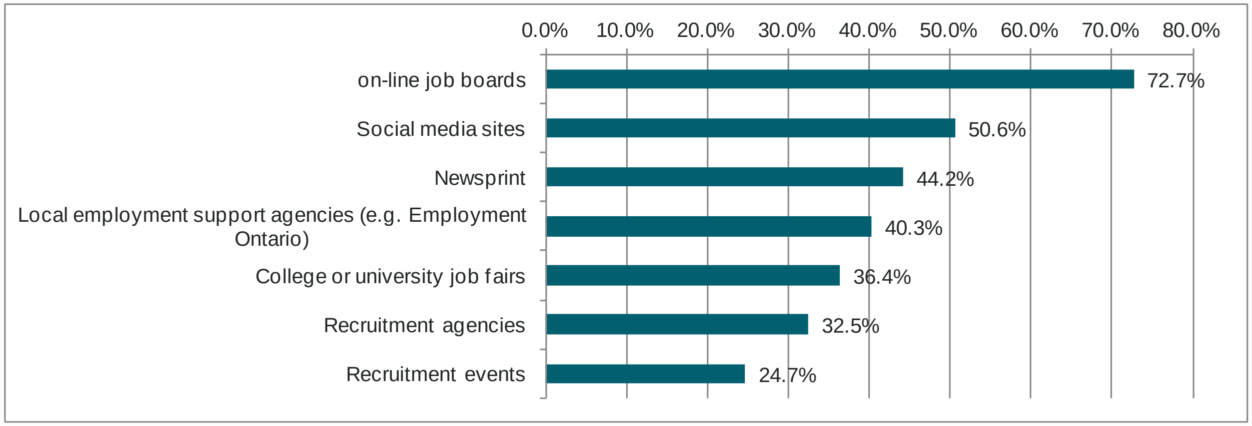
What are the skills of the most desirable candidates that join your business?

- Strong work ethic
- Sales
- Customer service
- Communication (oral and written)
- Numeracy and mathematical skills
- Passion/ Ambition/ Eagerness to work
- Professionalism
- Programming
- Interpersonal relations
- Innovative and entrepreneurial
- Software development
- Business acuity
- Ability to work independently

How do you recruit candidates to your business?

Local businesses utilize a wide variety of methods to attract workers and utilize new and traditional media as well as face-to-face opportunities to attract new employees. The majority of respondents indicated posting jobs on online job boards (72.7%) and social media sites (50.6%). Traditional recruitment methods such as newsprint and local employment support agencies (e.g. Employment Ontario) were used by less than half (44.2% and 40.3% respectively) of the respondents. Respondents were given the opportunity to list other recruitment methods. Personal networking, referrals and word of mouth methods garnered many responses.

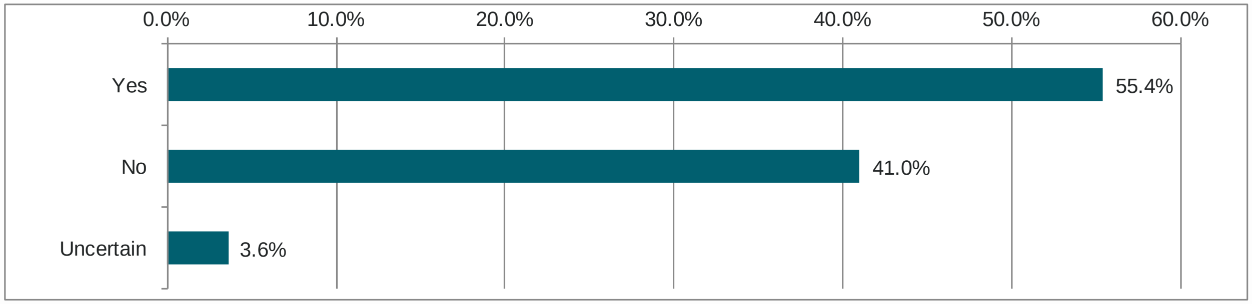
FIGURE 31 CANDIDATE RECRUITMENT (PERCENTAGE OF RESPONDENTS)



Does your company actively recruit outside of Kingston to fill local positions?

The majority (55.4%) of respondents indicated that they recruit employees from outside of the city of Kingston; 41.0% indicated they recruit primarily in the local area.

FIGURE 32 RECRUITMENT OUTSIDE OF KINGSTON (PERCENTAGE OF RESPONDENTS)



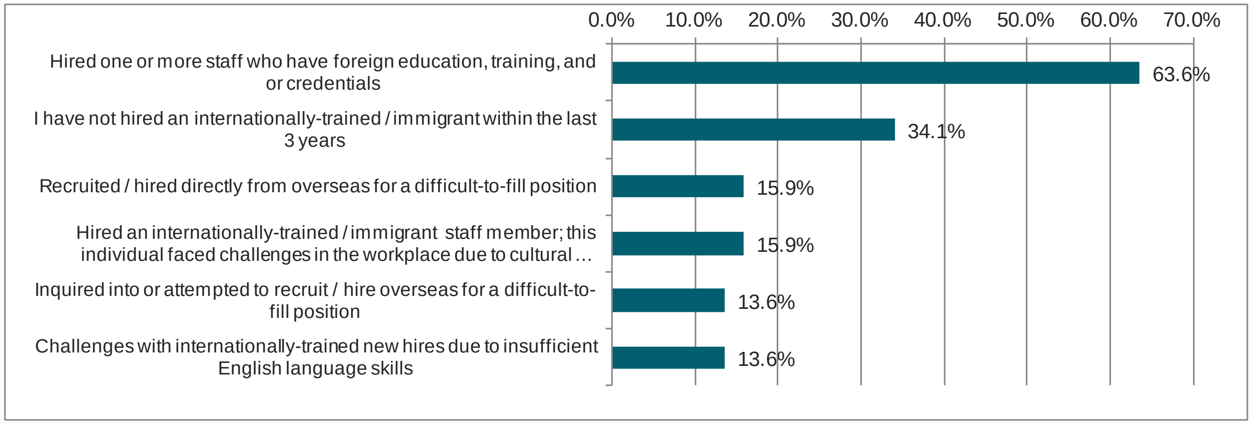
What communities/provinces/countries do you actively recruit from?

Of those respondents indicating they utilize external recruitment to the city, many indicated that they recruit on a provincial, national or global scale. Largely it seems that there is no discerning what particular parts of the world their workers are from as long they are trained and experienced in the field required.

Please check the following which apply to your recruitment/hiring of internationally-trained workers/immigrants within the last three years.

Nearly two-thirds (63.6%) of employers surveyed said that they had hired one or more staff with international education, training or credentials. One-third (34.1%) had not hired an internationally-trained immigrant within the last three years. These results show an openness and willingness to recruit expertise from around the world as well as from newcomers to Canada, allowing Kingston’s businesses to have a much larger pool of workers to draw from.

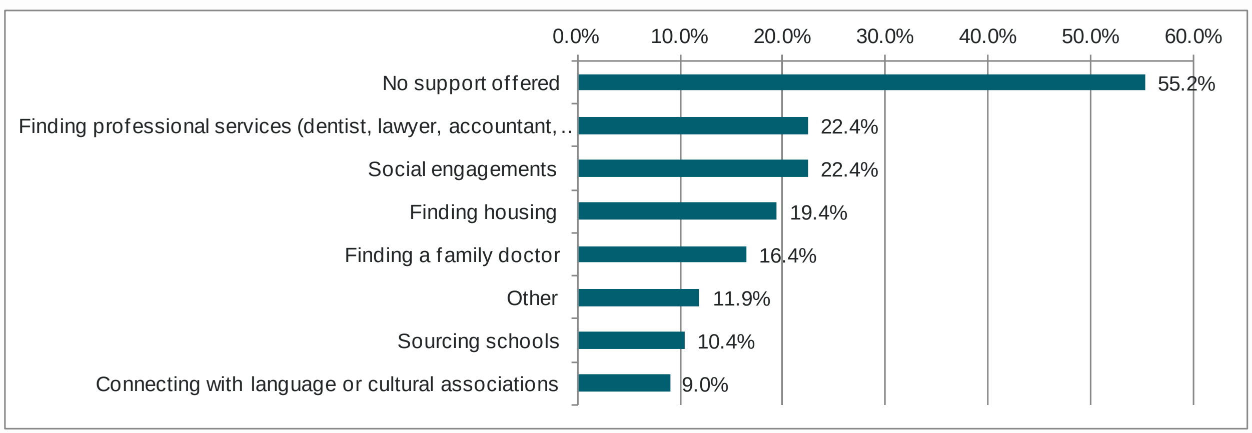
FIGURE 33: IMMIGRATION RECRUITMENT AND ATTRACTION (PERCENTAGE OF RESPONDENTS)



Please indicate any formal assistance/support you provide to new employees and their families.

Over half (55.2%) of respondents indicated that they do not provide assistance to new employees. The respondents who provide assistance, identified assistance finding professional services (22.4%), social engagements (22.4%), finding housing (19.4%) or finding a family doctor (16.4%).

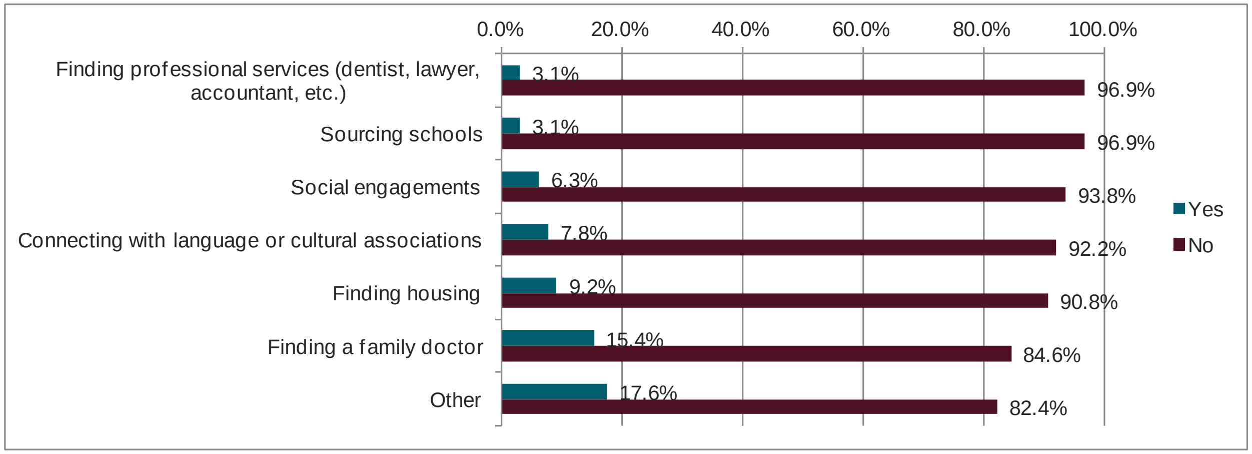
FIGURE 34 FORMAL ASSISTANCE/SUPPORT FOR NEW EMPLOYEES (PERCENTAGE OF REPSONDENTS)



In your experience, have the assistance/supports listed below been a barrier to hiring new employees?

Largely, respondents did not feel that the supports listed were barriers in attracting potential employees to the city of Kingston. Finding a family doctor was a barrier for less than one of five (15.4%) respondents. Of the 17.6% of respondents who answered ‘other’ transportation to and from work and spousal/partner employment support were most important factors. This sentiment was echoed throughout the key informant interviews with many employers emphasizing the importance of supporting employment linkages for the spouse/partner as well.

FIGURE 35 BARRIERS TO HIRING NEW EMPLOYEES (PERCENTAGE OF RESPONDENTS)



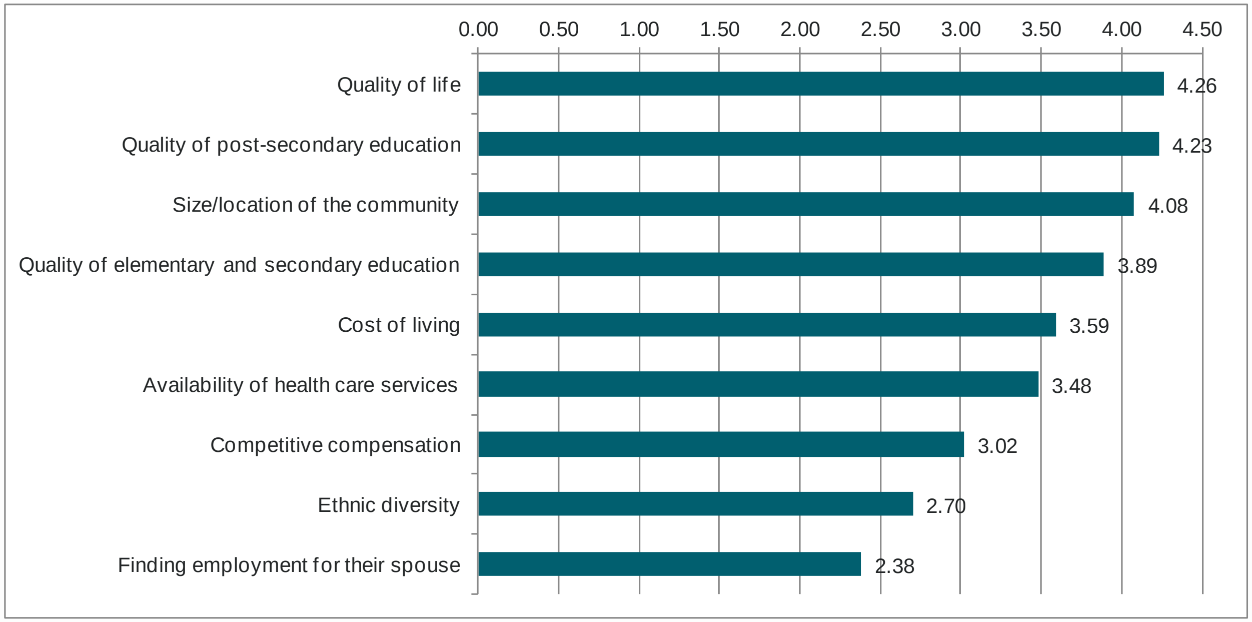
In your experience, when recruiting from outside of Kingston, how appealing is Kingston in the following areas?

Largely people find Kingston appealing in the following leading factors:

- Quality of life (4.26)
- Quality of post-secondary education (4.23)
- Size/location of the community (4.08)

However, the most significant weakness highlighted in this response is the difficulty in finding employment for spouses/partners (2.38).

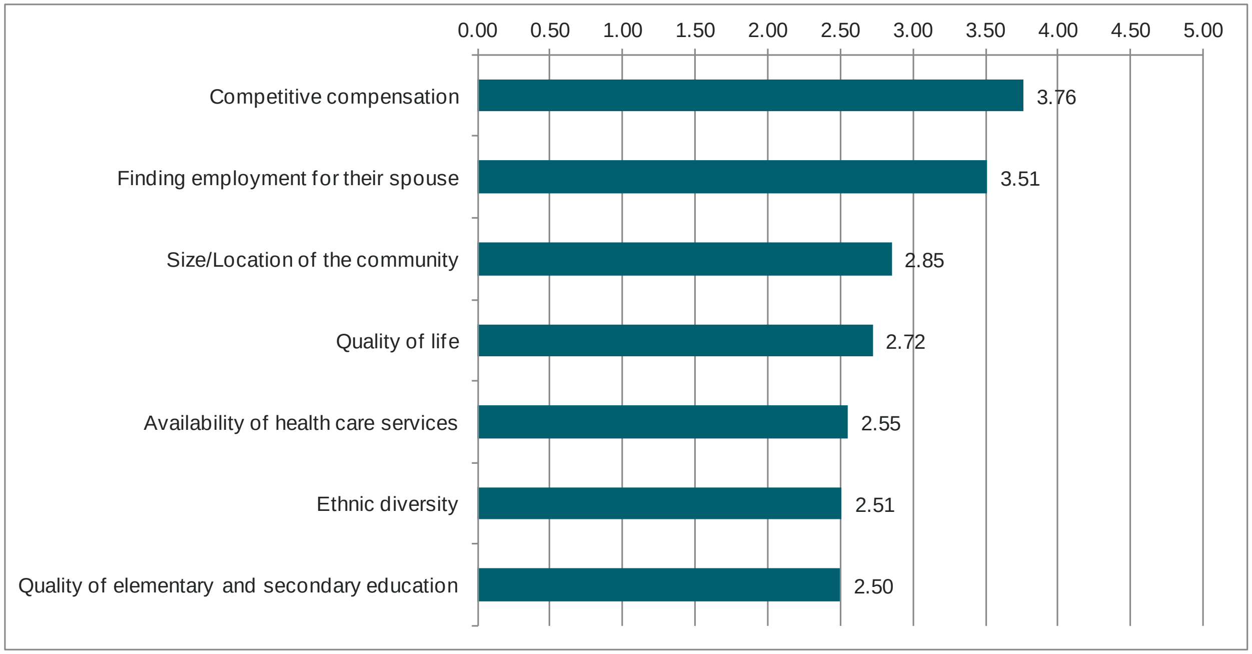
FIGURE 36 KINGSTON'S APPEAL (AVERAGE RATING OUT OF FIVE)



In your experience, please rate the extent to which the following factors may influence an employee to leave.

The factors that most highly influence an employee from leaving Kingston were more competitive compensation (3.76) and finding employment for their spouse/partner (3.51). These factors are difficult to combat since there is a greater diversity of employment opportunities in larger centres such as Toronto, Ottawa and Montreal with higher compensation.

FIGURE 37 FACTORS THAT INFLUENCE AN EMPLOYEE TO LEAVE (AVERAGE RATING OUT OF FIVE)

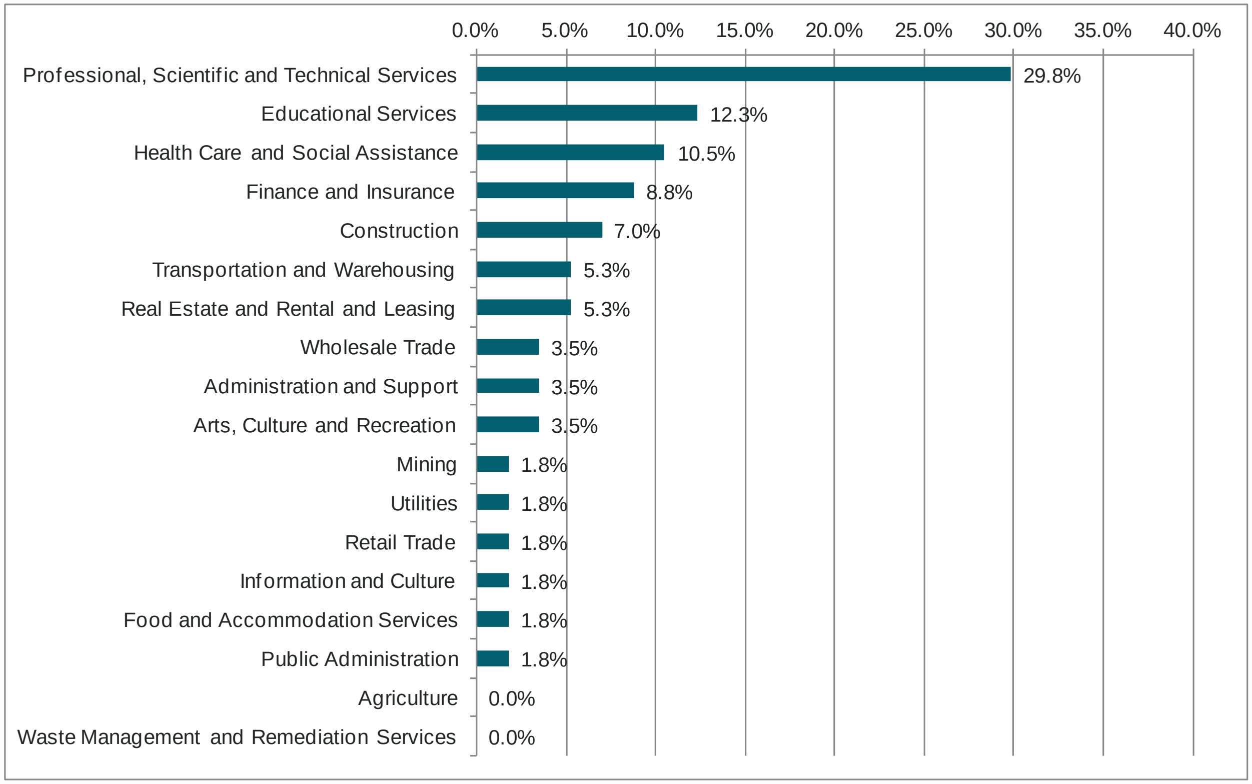


3.2.5 Company Profile

What is your company's main business sector of activity in Kingston?

Of the respondents who indicated their main business sector of activity, three of ten (29.8%) were in the professional, scientific and technical services sector and an additional 12.3% and 10.5% were in the educational services, and health care and social assistance sectors respectively. Employers in these two sectors tend to have well educated employees with specialized skill sets.

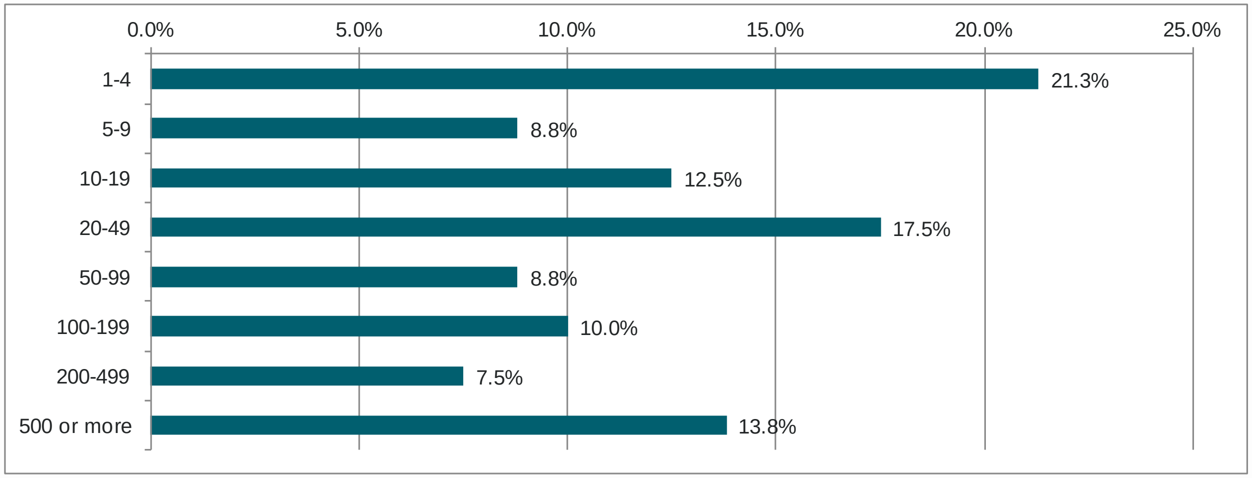
FIGURE 38 EMPLOYER SECTOR (PERCENTAGE OF RESPONDENTS)



How many permanent employees are employed at your company in Kingston?

The number of permanent employees with the respondent companies was varied. One of five (21.3%) respondents have 1-4 employees, 17.5% have 20-49 employees, 13.8% have 500 or more employee and 12.5% have 10-19 employees. The following figure shows the diversity of the employer sizes in Kingston.

FIGURE 39 NUMBER OF PERMANENT EMPLOYEES (PERCENTAGE OF RESPONDENTS)



How many temporary or contract workers are employed at your company in Kingston?

In terms of temporary or contract workers, 22.2% of the respondents surveyed do not have any on staff. Of the respondents who have permanent staff of less than 100 employees, it is common to have 1-4 temporary or contract employees as the following table indicates. For companies that have more than 100 permanent employees, it is common to have greater numbers of temporary or contract workers. These results indicate that permanent employment is the most common type of employment; however, there is a segment of the labour force across company sizes that are employed in temporary or contract employment arrangements.

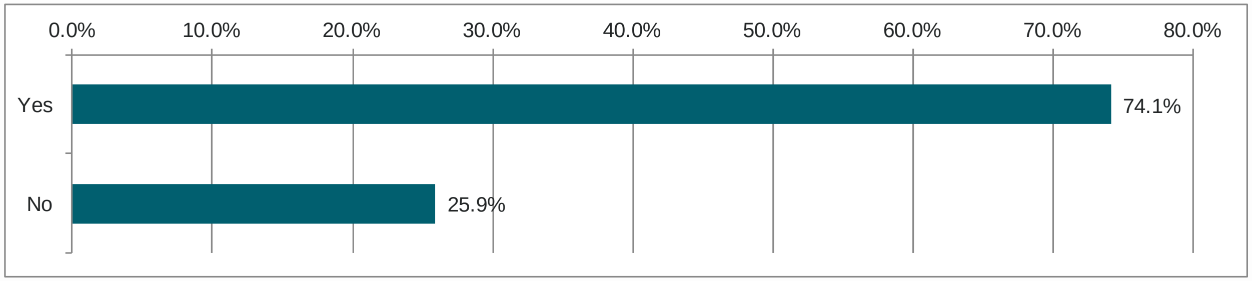
FIGURE 40 MOST COMMON RESPONSE FOR NUMBER OF TEMPORARY OR CONTRACT EMPLOYEES BY COMPANY SIZE

No. Of Permanent Employees	Most Common Response
1-4	1-4 temporary or contract employees
5-9	Equally split between none and 1-4 temporary or contract employees
10-19	1-4 temporary or contract employees
20-49	1-4 temporary or contract employees
50-99	1-4 temporary or contract employees
100-199	None, but 1-4 and 20-49 temporary or contract employees also common responses
200-499	Equally split between 1-4 and 10-19 temporary or contract employees
500 or more	200-499 temporary or contract employees, but 20-49 and 50-99 temporary or contract employees also common responses

Is your company's head office located in Kingston?

Three of four (74.1%) of the business respondents have their head offices located in Kingston. This is particularly important to note because of the importance placed on the inability to hire managerial staff. With a number of head offices located in Kingston it is important there is adequate managerial staff available to suit the needs of local business.

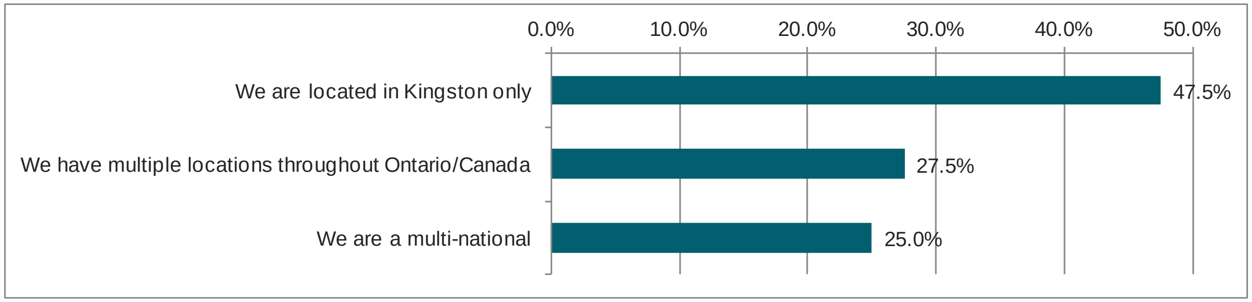
FIGURE 41 HEAD OFFICE LOCATED IN KINGSTON



What best describes your company?

Of the companies surveyed, nearly half (47.5%) are only located in Kingston. The remaining companies are either located throughout Ontario and Canada (27.5%) or multi-national corporations (25.0%).

FIGURE 42 COMPANY LOCATIONS (PERCENTAGE OF RESPONDENTS)



4 Framing Kingston's Labour Market Strategy

4.1 Challenges Based on Labour Market Outlook and Local Profile

Despite the net labour market stability across Canada and the province of Ontario, there were four major themes that emerged that will influence the future labour force.

An Ageing Population will Change the Labour Force Composition –The largest growth segment of the labour force is the age group that is over 60 years of age. This labour market trend brings challenges to Canada, the province of Ontario and the city of Kingston since there are many highly influential, knowledgeable people with specialized skills and finances who can influence local economic growth. Younger segments of the labour force will need to fill these positions as they retire and this will create opportunities for employment, business succession and new business growth. In addition, the labour force will become more reliant on immigrant and Aboriginal populations to fill positions and contribute to the knowledge-based economy. It will become increasingly more important for communities like the city of Kingston to attract immigrant and Aboriginal populations to sustain their local economy and counter the declining fertility rates of the Canadian-born population.

Innovative Processes and People will Drive Future Labour Force Growth – Over the course of time, the difference in Canadian labour force productivity compared to the United States has spread. This spread will be very difficult to make up; however, Canadian investment in innovative processes will be a key driver for improving productivity. The city of Kingston is well positioned to capitalize on innovation. Not only does the city have a highly educated labour force, Kingston is home to two leading universities – Queen's University and the Royal Military College and a progressive college **-** St. Lawrence College. These post-secondary institutions offer innovative research and programs in applied sciences, engineering and technologies and health care. It will be imperative for the future of the city's labour force that the young population is well aware of the importance and value of post-secondary education and the innovative programs offered within their city.

Strong Public and Health Care Sector Presence Mixed with Many Small Businesses – The public and health care sector makes up a large composition of the labour market. The advantage of the large public sector presence is that it offers labour force stability. Labour demand prospects for health care related occupations are good over the short term, a positive labour force attractor. Mixed with these two sectors is the small business contingent in the city largely represented in health care, professional services, other services (e.g. automotive repair shops, household goods repair shops, beauty salons, religious organizations, non-profit organizations) and retail trade. They are a very valuable segment of the economy and offer and collectively employ a growing segment of the labour force.

Good Employment Prospects for Professionals in Business and Finance, Health Care and Skilled Trades – There is an under-representation of professionals in business and finance in the city of Kingston, which typically include accounting-related professions and specialized managers. Labour demand prospects are good for the health care occupations with potential for greater demand as businesses respond to the ageing population and demand for health related services. Labour demand prospects are also good for skilled trades' occupations such as mechanics and trades people in construction related industries.

4.2 Challenges and Insights Identified through the Consultation Process

Specialized Professionals Need Spousal/Partner Employment Opportunities – Many stakeholders identified that specialized professionals such as pharmacists, upper level management and engineers were a gap in the labour force. Employers have difficulty recruiting people in these specialized occupations due to a lack of employment opportunities for their spouse/partners. This challenge is impeding the city`s future economic growth and prosperity. Finding employment for a spouse/partner was ranked the lowest in city appeal.

Highly Skilled and Educated People Leave Kingston for Larger City Centres – Many stakeholders acknowledged that the post-secondary institutions are graduating a talent labour pool and future entrepreneurs. However, a significant portion of this highly skilled and knowledge-rich population is leaving Kingston for employment opportunities in larger city centres such as Ottawa, Toronto or Montreal. Some of these graduates also leave to pursue employment opportunities in high economic growth areas in Saskatchewan and Alberta. Limited relevant employment prospects in Kingston will be a continued challenge until the economic opportunities are diversified. There is a defined opportunity for more collaboration with and among post-secondary institutions and the business community to support innovation and commercialization, strengthen business processes, and tap into the economic asset found within the post-secondary system.

Employers Predict Labour Force Needs over the Short Term and Train Using Internal Methods – The online survey revealed that employers are hiring staff to address short term (i.e. less than one year) labour needs. Many employers will advertise employment vacancies using online methods and their vacancies will be filled within two months. It is common for employees to be trained using internal methods such as company training programs, mentoring systems, videos or manuals. A tuition refund program is also used as a method to train employees.

Most Employers are not Anticipating a Workforce Shortage – A key finding from the community consultation process was that the majority of employers do not anticipate a workforce shortage. Of those that indicated a shortage, the occupations in greatest need are in management and skilled trades (mechanics).

4.3 A Strategic Approach

This section offers three key themes around which actions have been built to address the identified challenges and frame a labour market strategy for the city of Kingston. The key themes are as follows:

- Educate the labour force about local employment prospects
- Attract and retain the well-educated and skilled younger population
- Create a culture of entrepreneurship.

4.3.1 Educate the labour force about local employment prospects

The demographic shift that is occurring in the city is going to change the labour force composition. Many baby-boomers are within ten years of retiring, which will create not only opportunities for advancement as they exit, but also new employment opportunities for those transitioning into or active within the labour market. Although employers indicated that they are not anticipating a workforce shortage over the short term, there are existing local employment opportunities for those educated or trained as professionals in business, finance and health care and as skilled trades. Many of the local employers who are hiring can predict their labour force needs over the short term (i.e. less than one year). A key priority is ensuring a strong, relevant communication strategy that promotes these opportunities to the local labour force. All of these local labour force messages need to be communicated effectively, highlighting both the opportunity and the attractiveness of Kingston as a city to live and work.

For delivering on this theme, the labour market strategy's goal is as follows:

Strategy 1:

Promote the city of Kingston as a viable and exciting employment destination.

4.3.2 Attract and retain the well-educated and skilled younger population

The city of Kingston is a medium sized city centre and offers limited employment opportunities within its geographic boundaries. Many specialized professionals who are attracted to Kingston for employment are oftentimes accompanied by their spouse or partner who is also active in the labour market and needing to secure employment. This is often challenging as they are also in a specialized field or they lack the local networks and contacts. If Kingston is to successfully attract talent that is in demand, there must be a focus on addressing this dual career family challenge.

The city of Kingston is also home to a distinguished university and a progressive college. Although it is unrealistic to expect all graduates to remain in the Kingston area after graduation, retaining more of the population who have graduated from these institutions will positively impact the city's competitive advantage in the area of population education attainment.

For delivering on this theme, the labour market strategy's goal is as follows:

Strategy 2:

Engage with youth and professionals about local employment and business opportunities.

4.3.3 Cultivate a culture of entrepreneurship

The city of Kingston has a very large segment of the business base that is small or medium sized (i.e. fewer than 50 employees). The results from the community consultations revealed that many local companies were founded by local entrepreneurs who either grew up in the city or went to university or college and stayed in Kingston. Small companies are also versatile and adaptable to new technologies and processes that strengthen competitiveness. Support for small business development and cultivation for entrepreneurship within the city needs to be encouraged. This can be strengthened, in part, with a stronger relationship between the post-secondary institutions and business and industry.

For delivering on this theme, the labour market strategy's goal is as follows:

Strategy 3:

Create a local culture where entrepreneurship is encouraged and promoted.

5 Labour Market Strategies – Recommended Actions

The **STRATEGIES** and associated **RECOMMENDED ACTIONS** that follow are based on the background research analysis and consultation results. They require a commitment from the local business community, voluntary sector, government, education institutions and Kingston Economic Development Corporation (KEDCO), to support implementation and ongoing monitoring. The labour market development strategies are:

- Promote the city of Kingston as a viable and exciting employment option with local employment prospects.
- Engage with youth and professionals about local employment and business opportunities.
- Create a local culture where entrepreneurship is encouraged and promoted.

The associated actions that serve to achieve these goals are prioritized as **SHORT TERM** (Less than two years), **MEDIUM TERM** (3 to 4 years) and **LONG TERM** (5+ years). The prioritization of actions is intended to reflect a logical sequence of activities.

Effective implementation of the recommended actions must be accompanied by effective performance measurement that serves as a tool to determine how well a job has been done using both qualitative and quantitative information and activities. Performance measurements track quality and performance by:

- Providing public accountability
- Assisting with human resources management
- Using results to improve performance and
- Identifying the return on investment

A more formal and comprehensive performance measurement model may be utilized to keep the community engaged and informed of outcomes as these actions are implemented.

5.1 Strategy #1: Promote the city of Kingston as a viable and exciting employment destination

Recommended Actions	Potential Partners	KEDCO Role	Timing
1. Promote innovative businesses in Kingston that have wide market reach and utilize local talent.	PARTEQ Innovations, St. Lawrence College`s Sustainable Energy Applied Research Centre, 1000 Islands Workforce Development Board	Lead	Short term
2. Showcase local businesses that support continued learning and innovative compensation programs.	Greater Kingston Chamber of Commerce	Lead	Short term
3. Create a sector awareness campaign that educates people in the labour force about local career opportunities.	1000 Islands Workforce Development Board	Partner	Short term
4. Support the efforts from the Kingston Immigration Partnership (KIP) Council to attract, retain and integrate immigrants to the Kingston area.	Kingston Immigration Partnership Council; 1000 Islands Workforce Development Board	Support	Short term to long term
5. Initiate a social media strategy that profiles local employment opportunities and showcases business success stories directed to St. Lawrence College and Queen's University students.	Queen`s University and St. Lawrence College Career Services Greater Kingston Chamber of Commerce	Support	Short term to medium term
6. Create educational forums or workshops for small businesses on employee recruitment practices and policies.	Greater Kingston Chamber of Commerce	Support	Short term to long term
7. Address dual career family employment barriers by creating a single local resource database that can match skills/competencies with potential local employers.	1000 Island Workforce Development Board	Partner	Medium term

8. Provide on-going labour market information that informs on local job vacancy rates, employment opportunities and skills demands	1000 Island Workforce Development Board	Partner	Medium term
9. Provide an evidence-based analysis of job vacancies on a regular basis to profile the City's opportunities	Kingston Economic Development Corporation	Lead	Short term

Performance Measures:

- Number of Kingston-based companies that are spin-offs from Queen`s University and St. Lawrence College
- Number of Kingston-based companies that have been profiled with continuous learning or innovative compensation programs
- Sector awareness campaign is utilized within the education and training sector to promote career awareness
- Number of new immigrants to Kingston year over year
- Increased usage through social media channels
- Number of educational forums that discuss employment practices and policies
- A spousal skills and competencies database created
- Accessibility to local labour market information on job vacancies is increasing

5.2 Strategy #2: Engage with youth and professionals about local employment and business opportunities

Recommended Actions	Potential Partners	KEDCO Role	Timing
1. Create forums that promote engagement and conversation between and among specialized professionals and student populations to encourage interaction and knowledge exchange about hiring requirements and skills in need in related occupations.	1000 Islands Workforce Development Board	Support	Short term
2. Disseminate local labour market information to businesses and the labour force through multiple channel distribution (on-line, e-bulletins, social media).	1000 Islands Workforce Development Board, Queen's University, St. Lawrence College	Partner	Short term
3. Develop a business case that validates the return on investment for local businesses to participate in work-college apprenticeship programs offered at St. Lawrence College.	St. Lawrence College	Support	Short term to long term
4. Encourage local businesses to participate in university internship programs throughout the province as a means of demonstrating the high skill levels of interns and short-term contributions that can be achieved through this relationship.	Kingston Economic Development Corporation	Lead	Short term to long term
5. Create direct interaction opportunities between pending graduates and local employers as a means of retaining graduating talent. This can be delivered through a sector-specific and related faculty approach.	1000 Islands Workforce Development Board	Partner	Short term to long term
6. Support local business owners looking to retire from their business through the development of an exit strategy that links business owners and young professionals seeking local business opportunities.	Great Kingston Chamber of Commerce	Partner	Medium term
7. Encourage local businesses to provide scholarships and bursaries to local	Limestone District School Board, Algonquin and	Support	Medium term

secondary school students who remain in Kingston and attend either Queen’s University or St. Lawrence College.	Lakeshore Catholic District School Board		
8. Work collaboratively with secondary and post-secondary institutions to develop career profiles and pathways to employment, for occupations experiencing labour force gaps.	1000 Islands Workforce Development Board	Partner	Short term

Performance Measures:

- Number of forums created that are directed to specialized professionals and young student populations
- Number of local businesses participating in work-college apprenticeship programs offered through St. Lawrence College
- Number of local businesses participating in university internship programs offered through Queen’s University
- Number and dollar value of scholarships and bursaries available to local secondary school students who attend either Queen’s University or St. Lawrence College
- Number of success stories for business succession planning
- Increased access to relevant career profiles and pathways

5.3 Strategy #3: Create a local culture where entrepreneurship is encouraged and promoted.

Recommended Actions	Potential Partners	KEDCO Role	Timing
1. Create information-sharing forums between post-secondary institutions and the business community regarding innovative research and the application of this research to industry; highlight new innovative businesses emerging.	Queen`s University, St. Lawrence College	Support	Short term
2. Monitor and communicate changes in new business start-ups, by number of businesses, growth, sector, and generated revenues and employment (aggregated) to demonstrate Kingston as an entrepreneurial climate.	1000 Islands Workforce Development Board, Greater Kingston	Partner	Medium term

	Chamber of Commerce		
3. Develop a stronger partnership with the Eastern Lake Ontario Regional Innovation Network (ELORIN) to encourage and support entrepreneurship, innovation, commercialization and investment into knowledge-based industries in the city. ▪ Support funding applications, where appropriate, to facilitate business outreach and service delivery ▪ Promote city success stories that have attracted investment or generated growth through use of the Network`s services	Eastern Lake Ontario Regional Innovation Network	Partner	Short term

Performance Measures:

- Number of relevant forums, seminars and training opportunities offered
- Increase in secured funding for the Eastern Lake Ontario Regional Innovation Network
- Number of city businesses using the Eastern Lake Ontario Regional Innovation Network
- Increase/decrease in new business start-ups and growth.

Appendix A: Employment Demand Outlook by Industry (NAICS)

Public & Health Care Sector

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
Health care and social assistance (62)			
	D0 Professional occupations in health	Good	The high entrance requirements and limited post-graduate training positions in medical, dentistry, veterinary and other health related schools across Ontario and Canada may restrict the labour supply. Health professionals tend to migrate to regions that have healthcare networks and medical/healthcare education centres. As a result, some remote and rural communities may experience difficulty filling specialist vacancies. Based on current demographics, the growing and aging population in Ontario will increase the demand for health professionals as the healthcare sector continues to expand.
	D1 Nurse supervisors and registered nurses	Good	Many more job openings will be created over the medium term from the need to replace workers who retire or leave. In addition to strong growth, recent changes requiring all new registered nurses to have a four-year bachelor degree in nursing (BScN) may curtail the number of new graduates. The Canadian Nurses Association predicts a shortage of 59,000-113,000 nurses nationally (excluding Quebec) by 2011. The employment of nurses will not grow at the same pace in every industry. Employment in hospitals is expected to be stable in the forecast period as inpatients are discharged earlier and many treatments are performed on an outpatient basis. However, employment in outpatient care facilities, nursing homes and home health care will continue to spur demand for these professionals. Nurses' roles will change as new technology continues to be introduced at the bedside and as nurses are allowed to perform more advanced procedures. Restructuring of the health care system, including specialization and the shift from institutional to home care is also changing the locations of work, skills and requirements for nurses.
	D2 Technical and related occupations in health	Good	Increases in illnesses associated with an ageing population should increase the demand for workers in this occupation. As well, innovations in the use of nuclear medicine to diagnose illnesses, such as cancer, may increase demand for these technical occupations.

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
	D3 Assisting occupations in support of health services	Good	Over the next few years, the share of seniors in the total population will increase due to demographic factors such as higher life expectancies. Job prospects will be positively impacted by the Government of Ontario's `Aging at Home' strategy, which will offer more home care and community support services to seniors. Many job openings will also arise in nursing care facilities, as these centres admit more patients for continuing care to relieve accommodation pressures in hospitals.
	E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	Good	Demand in this occupation is mostly dependent on government funding. Employment growth has been fairly strong over the last several years, as health and social services budgets have increased to meet the changing needs of a growing, aging population. Some opportunities have occurred with a shift in the delivery of services to a more community-based model. Prospects could moderate with tighter government spending expected over the next few years. Positions within voluntary organizations are vulnerable to declines in charitable giving. Growth areas have included mental health services, early childhood services, services to the elderly, and community-based outreach services.
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.

Goods Producing and Distributing Industries

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
Agriculture, forestry, fishing and hunting (11)			
	I0 Occupations unique to agriculture, excluding labourers	Average	The overwhelming majority of job openings will occur from replacement needs as older farmers retire and fewer people enter the profession. The long-term trend toward consolidation of farms will mediate employment opportunities for this occupational group.
	I2 Primary production labourers	Average	The ongoing need to maintain public and commercial green spaces, including golf courses, recreational facilities and highways, helps to support prospects.
Mining and oil and gas extraction (21)			
	C0 Professional occupations in natural and applied sciences	Good	This is not a significant occupation in this region.
	I1 Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers	Good	This is not a significant occupation in this region.
Utilities (22)			
	H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	Average	Employment in this occupation depends heavily on the rate of expansion of electrical generating and transmission capacity. Major sources of demand will come from the expansion of new capacity due to urbanization, replacement of old infrastructure, and the refurbishing of some nuclear power plants.
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.
Construction (23)			
	H1 Construction trades	Good	Employment for carpenters is dependent to a large degree on construction activity, which is expected to be impacted over the forecast period.

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
	H8 Trades helpers, construction, and transportation labourers and related occupations	Average	The recent improvement in economic conditions has allowed demand for workers in this occupation to recover. Road, highway and other infrastructure construction is expected to continue for the foreseeable future.
Manufacturing (31-33)			
	J1 Machine operators in manufacturing	Limited	Employment growth in this occupational group is affected by technological change, the demand for the goods they produce and the economic cycle. Greater use of computer-controlled machine tools and changes in production processes that combine production tasks have reduced the overall demand for machine operators. Increased production efficiency in the future will mean that fewer workers will be required to do the same amount of work.
	C0 Professional occupations in natural and applied sciences	Fair	Increased investment in public transit fleets and in sustainable energy facilities including wind and hydro plants within Ontario should add to opportunities. A higher Canadian dollar and a more volatile manufacturing sector may temper opportunities. The continued overlap between the fields of mechanical and electrical engineering due to the growing use of electronics in machinery and process control may also be a minor factor contributing to fewer employment opportunities.
	C1 Technical occupations related to natural and applied sciences	Average	The growing use of advanced technologies, such as computer-aided design and drafting and computer simulation, will continue to moderate employment growth. People in these occupations should plan for continuous retraining and professional development to keep up with the rapidly changing technology in their field.
	J3 Labourers in processing, manufacturing and utilities	Fair	The number of available positions is largely influenced by economic conditions in the manufacturing sector.
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
	H3 Machinists, metal forming, shaping and erecting occupations	Average	Employment in this occupation is impacted directly by technology, foreign competition in the manufacture of goods and the economic cycle. The work of machinists continues to be transformed by the increasing use of sophisticated computerised numeric control (CNC) machines, autoloaders, and robotics. Technology has resulted in fewer machinists being required to do the same amount of work.
	J2 Assemblers in manufacturing	Limited	Many companies have invested heavily in high-technology manufacturing processes, such as robotics, lasers, computers and programmable motion control devices and sensing technologies in order to remain competitive. Employment prospects will be best for those who are able to adapt and acquire new skills and knowledge in this field
	H4 Mechanics	Fair	The older age profile of this occupation means retirements will be an increasing source of job openings. With increasing automation and use of robotic processes in industrial equipment, productivity improvements may moderate future growth in the long term. Individuals with trade certification and additional skills, such as welding and electrical troubleshooting, should have better prospects.
Wholesale trade (41)			
	G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	Average	Employment growth in this occupation is influenced by consumer spending and demand for the products and services being sold. The increased usage of e-commerce may reduce the demand for workers in this occupation. Consumers are able to purchase products directly over the internet.
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
	A1 Specialist managers	Average	Employment trends in this occupational group are directly related to consumer/business spending and move in tangent with the overall strength of the broader economy. Increasing operations in foreign markets, as well as foreign competition, will require increased knowledge and experience in international marketing and advertising. In addition, expertise in new electronic avenues for sales and marketing, such as e-commerce is an advantage.
	H7 Transportation equipment operators and related workers, excluding labourers	Fair	Technology has had a big impact on the trucking industry. Trucks are now more efficient and safer to operate, but they are also more mechanically complex. Emerging training needs for drivers include computer skills, electronic technologies, defensive driving, inspection, trouble-shooting and customer relations. Truck drivers with experience and a clean driver abstract will have the best job prospects, especially if they are bondable and have other certification such as carrying dangerous goods. Long-haul drivers will have better prospects than most other types of drivers because of higher reported turnover.
	H8 Trades helpers, construction, and transportation labourers and related occupations	Average	This is not a significant occupation in this region.
Transportation and warehousing (48-49)			
	H7 Transportation equipment operators and related workers, excluding labourers	Fair	Technology has had a big impact on the trucking industry. Trucks are now more efficient and safer to operate, but they are also more mechanically complex. Emerging training needs for drivers include computer skills, electronic technologies, defensive driving, inspection, trouble-shooting and customer relations. Truck drivers with experience and a clean driver abstract will have the best job prospects, especially if they are bondable and have other certification such as carrying dangerous goods. Long-haul drivers will have better prospects than most other types of drivers because of higher reported turnover.
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.

Population Supporting Industries

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
Retail trade (44-45)			
	G2 Retail salespersons and sales clerks	Average	Job opportunities are usually available year-round in this occupation but are better in the peak shopping seasons, during the summer and at the end of the calendar year. These positions are often part-time or temporary. The much younger age profile and lower skill requirements will create ongoing replacement needs for new employees, as workers leave for other opportunities.
	G3 Cashiers & G9 Sales and service occupations, n.e.c.	Average	Job opportunities are usually available year-round but are better in the peak shopping seasons: during the summer and at the end of the calendar year. This occupation experiences high turnover. The majority of job openings will stem from the need to replace workers who leave for other positions. The prevalence of part-time cashiering positions, the seasonal tendency and low skill requirements are favourable to many younger workers while they prepare for other careers.
	A2 Managers in retail trade, food and accommodation services	Fair	Employment growth in this sector is influenced by population growth, consumer spending and the state of the economy.
Information and cultural industries (51)			
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.
	F0 Professional occupations in art and culture	Average	Technological change has increased the need for editors with skills in particular technical areas - for example, computer program manuals and Internet web site editing. There is also more work on a freelance basis as the practice of outsourcing grows. This trend is reinforced by the availability of the Internet to transfer material between writer, editor and publisher.

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
	F1 Technical occupations in art, culture, recreation and sport	Average	Demand will continue to come from advertisers, publishers and computer design firms. The expansion in the video entertainment market including television, movies and video will present new opportunities for these workers and new requirements to keep up with the latest trends in technology. Designers with website design and animation experience will be in high demand for interactive design projects using video. games, cellular phones and personal digital assistants and other technology. Individuals with a bachelor's degree, knowledge of web site design and animation experience will have the best opportunities.
Finance and insurance (52)			
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.
	B0 Professional occupations in business and finance	Average	Financial auditors and accountants, who are up to date with the changing regulatory environment and who are proficient in financial information technology, will have better job prospects.
	B1 Finance and insurance administrative occupations	Average	Job opportunities will be moderated by improvements in accounting software and document-scanning technology. Outsourcing of record-keeping tasks to third party contractors has also reduced demand for bookkeepers. However, given the large size and older age profile of this occupational group, job opportunities will arise from the need to replace workers who leave or retire.
	A3 Other managers, n.e.c.	Average	Most job openings are expected to result from the need to replace critical knowledge and skills loss through retirees. Demand for banking services tends to grow as the economy grows. However, telephone and Internet banking has altered how customers receive banking services, often reducing the need for physical branch outlets. In major financial institutions, many managerial job openings are filled from within.

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
Real estate and rental and leasing (53)			
	G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	Average	Employment in this occupation is cyclical, often moving in tandem with residential construction. In periods of declining economic activity, sales in real estate will decline. Technology is also limiting growth in this occupation as most people can perform searches and access information on real estate on the Internet. Competition will be keen for this occupation as many people are attracted to this profession due to the flexible hours and potential for high earnings. Those with excellent customer service skills with extensive social and business connections will have the best job opportunities.
	B3 Administrative and regulatory occupations	Good	Opportunities for property administrators are impacted by the growth in real estate and commercial property markets. The rise in the number of condominiums, town houses and apartments will increase the need for property administrators. With the continued growth in the number of older people, there will also be an increased demand for various types of suitable housing such as assisted living arrangements and retirement communities.
	G9 Sales and service occupations, n.e.c.	Average	Job opportunities are usually available year-round but are better in the peak shopping seasons: during the summer and at the end of the calendar year. This occupation experiences high turnover. The majority of job openings will stem from the need to replace workers who leave for other positions.
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.
	A3 Other managers, n.e.c.	Average	Computerized financial systems and real estate listing services are widespread in the real estate industry and will continue to moderate future employment growth.
Other services (except public administration) (81)			
	G9 Sales and service occupations, n.e.c.	Average	Job opportunities are usually available year-round but are better in the peak shopping seasons: during the summer and at the end of the calendar year. This occupation experiences high turnover. The majority of job openings will stem from the need to replace workers who leave for other positions.

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
	E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	Average	Demand in this occupation is mostly dependent on funding from all levels of government, while the supply is somewhat restricted by high educational requirements. Prospects could moderate with tighter government spending expected over the next few years. Employment in the occupation has increased slowly but steadily over the last decade to meet the changing needs of a growing, aging population. Some growth areas have included mental health services, services to the elderly, palliative care and community-based outreach services.
	G8 Childcare and home support workers	Average	Employment demand in this occupation is driven by the health-care needs of an aging population and the shift in health care delivery to more focus on community-based care, helping the elderly to stay in their homes and hospital patients to be released earlier. Job prospects are positively supported by Ontario's Aging at Home' strategy, which expands funding for home care and community support services to seniors. The skill and educational requirements of workers in the home support and long term care sectors have risen over the last few years.
	H4 Mechanics	Average	Many job openings in this trade are for truck mechanics. Demand for these mechanics has grown. This is due to the increased use of trucks for goods transport and also because of an increased emphasis on truck maintenance given more stringent provincial safety standards. Innovation in vehicle technology is increasing the complexity of this trade, as demonstrated with the introduction of hybrid and electric cars. Workers who possess knowledge of electronic and computer regulated motor vehicle systems will have better job prospects. Employment prospects for automotive service technicians are closely linked with automobile dealerships and the level of auto and retail industry activity.

Tourism Related Sector

Industry (NAICS)	Common Occupations	Employment Demand Outlook	Demand Outlook Description
Arts, entertainment and recreation (71)			
	F1 Technical occupations in art, culture, recreation and sport	Average	This occupational group consists of a variety of job types (e.g. Theatre designers, artisans, athletes, coaches, recreation program leaders).
	F0 Professional occupations in art and culture	Average	The number of qualified individuals is expected to exceed the number of job openings as many people are attracted to this profession due to the high-profile nature of the work and the relative ease of entry. There is work on a freelance basis as the practice of outsourcing grows.
	G7 Occupations in travel and accommodation, including attendants in recreation and sport	Unavailable	
Accommodation and food services (72)			
	G9 Sales and service occupations, n.e.c.	Average	This occupation is over-represented in the region compared to other occupations due to the significance of tourism activities. Some employment opportunities in the region tend to be seasonal as the large number of resorts in the area may operate for only parts of the year.
	G5 Occupations in food and beverage service	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.
	G4 Chefs and cooks	Average	This occupation is well represented in the region. Most job openings will arise due to the high turnover, as this is mostly an entry level position with a relatively young workforce. Demand for cooks tends to be seasonal and improves during the spring to fall seasons, owing to the large number of resorts in the region. Demand related to tourist spending has moderated over the last few years due to a high Canadian dollar and rising gas prices.

Other Industries

Industry (NAICS)	Most Common Occupations	Employment Demand Outlook	Demand Outlook Description
Professional, scientific and technical services (54)			
	C0 Professional occupations in natural and applied sciences	Average	This occupational group consists of a variety of job types (e.g. electrical engineers, mechanical engineers, architects, planners, land surveyors, etc.). These professionals work with computerized mapping systems, which require continuous skill upgrading.
	E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	Average	Labour supply in this occupation is constrained due to the high level of education that is required. Demand for lawyers is linked to population growth and the volume of business activity. The high cost of legal services, however, may lead to increased use of dispute-resolution systems in which lawyers' services are not mandatory. Also, electronic filings and the growth of computerized legal databases may increase the use of legal technicians instead of lawyers. For psychologists and social workers, an increased emphasis on mental health in the workplace, combined with the prevalence of employee assistance programs and counseling services, is driving demand for these professionals.
	C1 Technical occupations related to natural and applied sciences	Average to Good	This occupational group consists of a variety of job types (e.g. Engineering, architectural, drafting, surveying, computer technologists & technicians). These professionals work with computerized systems, which require continuous skill upgrading.
	B0 Professional occupations in business and finance	Average	Financial auditors and accountants, who are up to date with the changing regulatory environment and who are proficient in financial information technology, will have better job prospects.
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.
Management of companies and enterprises (55)			
	B3 Administrative and regulatory occupations	Good	Occupations which are more aligned with the aging population, such as financial planners and trust officers, may experience growing demand.

Industry (NAICS)	Most Common Occupations	Employment Demand Outlook	Demand Outlook Description
Administrative and support, waste management and remediation services (56)			
	B5 Clerical occupations	Limited to Average	Technological advancement will continue to limit employment growth and alter the job functions in this occupation, resulting in many of the clerical functions being consolidated with similar administrative roles.
	G9 Sales and service occupations, n.e.c.	Limited to Fair	There is a large variety of occupations in this industry. For travel services, Automated reservations and ticketing that enable passengers to make reservations and purchase tickets themselves have negatively impacted employment opportunities for this occupation. "One-Stop" electronic systems, which integrate numerous travel services, now allow payment for transportation, lodging and car rentals to be made at one location. In addition, new communications systems are allowing consumers to arrange many aspects of travel packages over the Internet. All these factors have reduced demand for travel counsellors especially those who do routine bookings. Travel agencies however will need to position themselves to meet the unique needs of niche markets by developing services that appeal to senior citizens, remote destination travellers, families and other groups willing to pay for specialized assistance. Those eager to travel to exotic and unique places will continue to prefer the services of a professional travel agent who can recommend excursions, provide travel advice and money saving tips. For janitorial and cleaning services, it has been a slow growing, stable occupation over the last several years. Some jobs will be created as new facilities, multiple housing and commercial establishments are built. However, turnover within this large occupation should provide most of the opportunities as workers leave for more highly paid or less strenuous, physical work.
	G6 Occupations in protective services	Unavailable	

Appendix B: Stakeholders Consultation List

Organization	Representative
Algonquin & Lakeshore Catholic District SB	Michelle Lamarche
Anchor Concrete	Sarah Rankin
Arbour Heights	Christine Sellery
Assurant Solutions	David Keneford
BMO (Bank of Montreal)	Lloyd Fleming
CIBC	Andra Fawcett
Corrections Canada	Bruce Somers
Covidien	Jatin Dholakia
Cruickshank Construction	Brenda McAllister
Eikon Devices	Dereck Knott
Empire Life	Beth Fraser
ESG Solutions	Andrea Newman
iStorm	Sam Khan
Kingston General Hospital	Andrea Sealy
Limestone District SB	Brenda Hunter
Performance Plants	Yafan Huang
Providence Care	Barb McCulloch
Sensient Colors Canada	Chris Tonzola
Stantive Technology Group	Karen de Libero
St. Lawrence College	