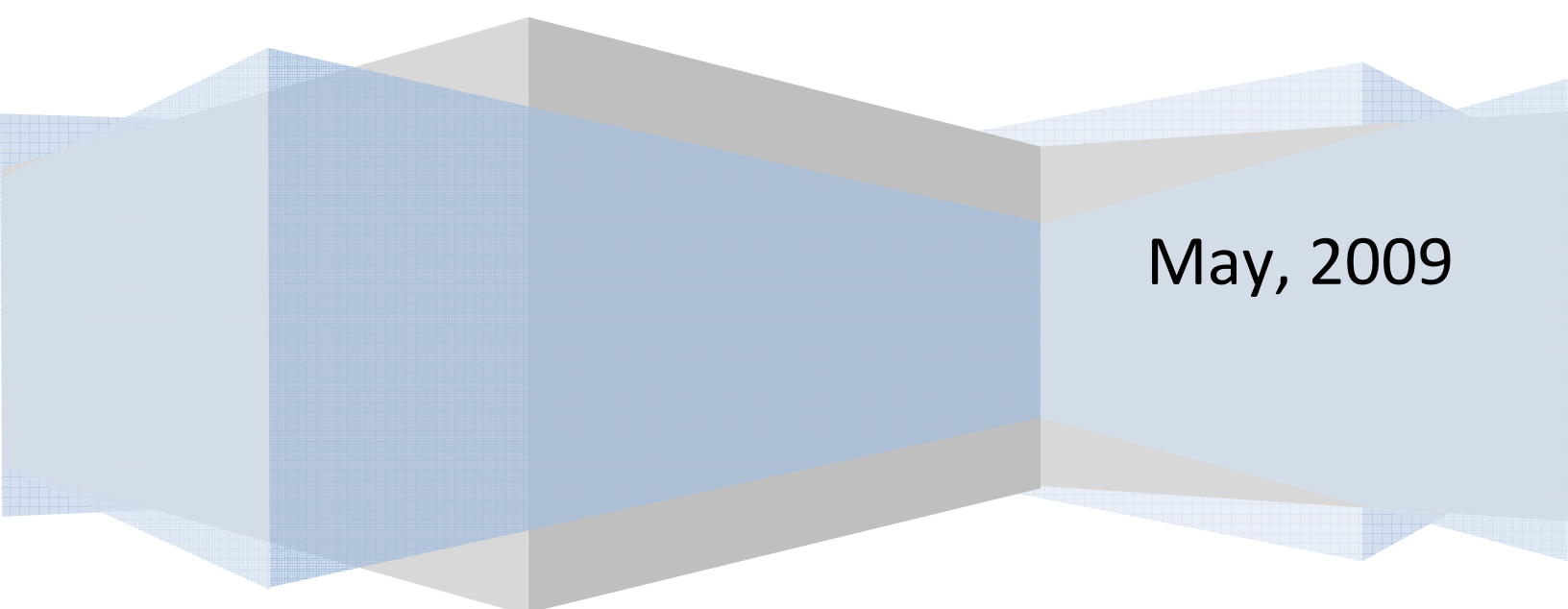


# The Labour Market Group

North Bay Labour Market Initiative

Lawlor & Associates Consultants Inc.



May, 2009

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## Introduction

Following the production of the 2008 Trends, Opportunities and Priorities Report, the LMG identified the priority of initiating a Labour Market Initiative for the City of North Bay to identify future needs of the local labour force in the light of changing trends that were observed. The study had several goals:

- To interview local employers to determine current and future labour force needs
- To identify areas of highest need in the local labour force
- To identify training requirements
- To provide training providers with information that would be useful in structuring and organizing their training programs
- To provide job seekers with insight into strategies that would be useful in positioning them for success in the labour market

Following a Request for Proposal, the firm of Lawlor & Associates Consultants Inc. was engaged to conduct the study.

Although the current report provides comprehensive, accurate and current information on the opportunities and challenges in the local job market, it is important to emphasize that it should not be viewed as a standalone tool, designed to provide job seekers with specific guidance concerning career choices. Although several methods are used to collect and present information in this report, forecasting future market behaviour is notoriously difficult and no reader should rely on a single source of information as a means by which to make decisions about something as important as a career path. Some careers tend to fit individuals, and some individuals tend to fit careers, depending on a host of factors that are unique to the individual. Thus, the mere fact that there may be significant demand for a given occupation should not, in and of itself, be sufficient motivation for individuals to pursue training and credentialization for this occupation, if the individual fails to possess the necessary individual characteristics that tend to be required for this occupation. Consequently, this study does not address every aspect of career planning and it is recommended that readers use this study, in conjunction with other information, to make informed decisions about their future career path.

When this Labour Market Initiative (LMI) was first commissioned in June, 2007, the thought that the world would experience, within less than six months, the worst financial challenge it has encountered since the 1930's, leading to business closures, job losses and major restructuring of global economies, was unthinkable. However, in the period from November, 2008 – February, 2009, it has become increasingly clear that it is critical that this plan must reckon with the realities which have befallen the Canadian economy, especially in light of ongoing losses of employment from December 2008 – March 2009.

Without being unduly pessimistic, it is critical that we recognize that we are experiencing a great transformation, as the local economy follows other North American economies along the road of deindustrialization, thereby evolving into a service-based economy, where a majority of jobs are in the knowledge-based, training-intensive --- health care, teaching, information technology, legal, accounting, engineering, architecture, skilled trades, government, etc. --- and less training-intensive --- tourism, retail

sales, etc. --- sectors. As a result of globalization, offshoring, outsourcing, labour costs, environmental legislation, labour legislation and a variety of related factors, the challenges of competing in the traditional manufacturing sector have increased dramatically. The history of deindustrialization suggests that, once a manufacturing concern closes in Ontario and reopens in a lower-cost labour zone, if, at some point in the future, such an operation relocates yet again, the manufacturer is tempted to relocate to yet an even lower-cost labour zone.

Thus, it is more realistic to work towards the development of a strategy that will ensure that we will come out of the recession stronger than we went into it, prepared to better compete in the new economy that is unfolding, where a majority of jobs will be in the service sector and where “up to 70% of future jobs created in Canada will require some post-secondary education.”<sup>1</sup> In order to do so, the LMG should adopt an anticipatory, rather than a reactionary, strategy. In this context workers, politicians, community leaders, service providers and policy makers would take a forward-focussed approach, instead of ineffectually chasing employment opportunities that once existed in our community, but that have now migrated to lower-wage labour zones, where labour, environmental and other regulatory provisions are characterized by laxity. The adoption of an anticipatory strategy will facilitate the identification and strengthening of primary, manufacturing and service industries in which our region, its workers and employers can compete regionally, provincially, nationally and internationally. In other words, the overall objective of the exercise is to determine where we can compete, where we can’t, and focus on, amongst other issues, knowledge-based economic opportunities that are likely to generate wealth, grow GDP, create jobs, and ensure that the skills of our region’s workforce are in tune with the range of employment opportunities that will exist in the future.<sup>2</sup> In order to achieve these goals, it is useful to conduct an analysis of the trends associated with where we have been, prior to charting and embarking on a future course.

The following table provides data on the long-term trends associated with the composition of the Canadian labour force beginning in 1891, when steam power, enabling and favourable legislation, a growing demand for manufactured goods, and the availability of capital and low-cost labour, coalesced to hatch a *bona fide* manufacturing sector in Canada during the closing decades of the nineteenth century. In 1891, manufacturing jobs comprised 20% of the labour force. Several decades later, in 1951, the number of people working in manufacturing rose to 31%. A position in this sector offered good wages and benefits, relatively stable job security and the opportunity to own a home, a car and raise a family – a scenario that some have characterized as “middle class.” Between the post-war period and the early 1970s, there was also a trend towards increased unionization, which tended to attach a wage premium, benefits, job security, seniority provisions and pensions to these manufacturing positions. These attributes tended to increase the desirability and value of manufacturing work in the Canadian economic context. While the work was often monotonous and dreary, positions rarely went unfilled due to the compensation that was attached to such jobs.

However, today manufacturing in Canada, as a percentage of total employment, has dropped significantly below levels seen in 1891, when the manufacturing sector had employed approximately one fifth of the total

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<sup>1</sup> Source: Bob Rae, Ontario: A Leader in Learning, 2005.

<sup>2</sup> See an article entitled Seeking New Life as the Old Factories Die by Ann Perry in the Toronto Star, March 21, 2009. Commenting on the Waterloo region, Mayor Carl Zehr said that it is poised “to recover faster and more than many other communities across Canada, and in Ontario specifically, because the transition [from an industrial economy to a service economy] had already been started prior to the meltdown last fall.”

workforce. Thus, we have seen the manufacturing sector move from about one-fifth of total employment in Canada in 1891, up to almost one third by 1951, and back down to 21% by 2004. By the end of 2008, this figure had fallen to 11.5%.

**Primary, Secondary and Service Sectors as a Percentage of Total Employment in Canadian Economy  
1891 and 2004**

Year	Primary	Secondary	Service
1891 <sup>3</sup>	49%	20%	31%
1951 <sup>4</sup>	22%	31%	47%
2004	5%	21%	74%

Source: H. Krahn and G. Lowe and K. Hughes, *Work, Industry and Canadian Society*, 2007, p. 60.

Traditionally, Ontario, along with Quebec, has been regarded as the backbone of manufacturing in Canada. Thus, Ontario’s manufacturing sector as a percentage of total employment (14%) currently exceeds the national figure of 11.5%.<sup>5</sup> However, this is small consolation when placed in the context of the stunning decline that the province experienced between 2004 and 2008, when Ontario’s manufacturing sector lost 198,000 jobs, for a decrease of 18.1% in manufacturing employment over a four-year period. During the same four-year period, Canada lost a total of 322,000 manufacturing jobs, meaning that Ontario’s loss of 198,000 positions accounted for almost two out of every three manufacturing jobs that were lost in Canada between 2004 and 2008.<sup>6</sup> Some sub-sectors within the Canadian manufacturing sector were hit relatively harder than others. For instance, this report found that Textile Manufacturing (-51.5% / -10,200 positions), Clothing Manufacturing (-46% / -37,800 positions) and Textile Product Mills Manufacturing (-41% / -10,200 positions) led all manufacturing sectors in percentage job loss terms, followed by Wood Products (-30.8% / -57,300 positions), while 19.8% of positions in Motor Vehicle Manufacturing (-15,900 positions) and 29.1% (-40,600 positions) of Motor Vehicle Parts Manufacturing positions, had also been shed. Although other sub-sectors in Canadian manufacturing had more modest losses, in all, 17 out of 23 manufacturing sub-sectors experienced losses and, as the foregoing numbers demonstrate, these losses were, in many cases, material. But perhaps most stunning is the short duration of time over which these losses occurred – four years.

On February 20, 2009, the Statistics Canada Daily<sup>7</sup> reported that in January, 2009, a total of 129,000 jobs were lost in Canada and that 100,000 of these positions were lost in Ontario. These are the highest monthly job losses in Canada since statistics were first recorded in the mid 1970s. Most of these job losses occurred in the vulnerable, manufacturing sector, where traditional employment had comprised full-time jobs, with high rates of pay, good pensions, attractive benefit programs and long-term employment. Clearly, as the current recession wears on, it is anticipated that further retrenchment will occur in the secondary, manufacturing sector, leaving many young job seekers and downsized, laid-off workers with a need for

<sup>3</sup> Roy Mathews, *Structural and Industrial Policy*, Ottawa, *Supply and Services Canada*, 1985.

<sup>4</sup> Garnet Picot, “The Changing Industrial Mix of Employment,” *Canadian Social Trends*, Spring 1987, pp. 8-11.

<sup>5</sup> Source: Toronto Star, February 21, 2009, Manufacturing Bleeding Jobs, page B3. This article points out that “a new Statistics Canada study says that Canada lost nearly 322,000 manufacturing jobs from 2004 – 2008, or more than one in seven. ... Statistics Canada reports that the share of manufacturing jobs in the economy fell to 11.5% in 2008.”

<sup>6</sup> Quebec, which held the second position in greatest losses in manufacturing, lost 86,700 positions from 2004 to 2008, followed by British Columbia, which lost 23,800. All other provinces had manufacturing sector losses that were trivial in comparison (in absolute terms), except for Saskatchewan, which added 2100 manufacturing positions.

<sup>7</sup> <http://www.statcan.gc.ca/daily-quotidien/090220/dq090220b-eng.htm>, accessed February 29, 2009.

support systems to assist them in making the adjustment to life in the new economy, as they attempt to transfer their skills, obtain training and/or retraining to deal with the challenges of seeing their “world taken for granted” evaporate before their very eyes.

On Saturday, March 14, 2009, the Toronto Star cited Statistics Canada figures reporting that another 83,000 jobs were lost in February, 2009, resulting in the loss of a total of 295,000 jobs since October 2008 and a Canadian unemployment rate of 7.7%. The article went on to state that Ontario lost 35,000 jobs in February, pushing Ontario’s unemployment rate up 0.7 of a percentage point to 8.7%, the highest level since April 1997.<sup>8</sup>

The job losses in the manufacturing sector raise a number of important questions: How will the job market compensate for the losses that have occurred in manufacturing? What will the future job market look like? How will Ontario restructure to compensate for the dearth of manufacturing jobs? For the answers to some of these questions, it is useful to revisit the preceding table to look at some of the long-term trends in the primary, secondary and tertiary sectors.

The data presented to this point reveal the evolutionary nature of the Canadian economy, both over the short-term, as demonstrated in the previous paragraphs, but also over the long-term. For instance, in 1891, almost half of the working population (49%) worked in such occupations as farming, fishing, mining, forestry and furs. By 1951, this figure had been cut by more than half to 22%. By 2001, only five per cent worked in the primary industries. Though incredibly important, because primary industries supply the raw materials (commodities) upon which many of the secondary and tertiary industries are based, the data suggest that fewer and fewer workers are employed in primary industries. The decreases in primary occupations and those discussed earlier in the secondary (manufacturing) occupations lead one to ask how it is that the unemployment level is not much higher than it currently stands – at 7.7%, as cited by the Toronto Star, for February 2009.

The answer may be found in the tertiary or service sector, which has experienced a strong secular trend towards growth since the late nineteenth century. In 1891, 31% of total employment was supplied by the service sector. By 1951, this figure had climbed to 47%. Today more than three quarters of all employment is supplied by the service sector. Unlike the manufacturing sector, which has sustained significant losses from 2004 to 2008, the service sector has continued to grow by between two and three-and-a-half per cent each year between 1998 and 2008 (except for 2001 when this figure dipped slightly below two per cent as a result of the 9/11 attacks).<sup>9</sup>

Recognizing the importance of the transformation that was occurring in the economy of the Province of Ontario in the early 21<sup>st</sup> Century, Premier Dalton McGuinty commissioned Dr. Richard Florida and Dr. Roger Martin of the Martin Prosperity Institute at the University of Toronto Rotman School of Management to complete a study entitled, “Ontario in the Creative Age,” which was released on February 5, 2009. Among other things, the report states that “nearly 80% of jobs in Canada are in service industries”<sup>10</sup> suggesting a need to adopt strategies aimed at allowing the Province of Ontario to survive and thrive in the new economic

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<sup>8</sup> Source: Toronto Star, Recession Eats 83,000 More Jobs, March 14, 2009, page B1.

<sup>9</sup> <http://www.statcan.gc.ca/pub/75-001-x/2009102/article/10788-eng.htm>, accessed March 10, 2009.

<sup>10</sup> Source: Roger Martin and Richard Florida, Ontario in the Creative Age, February 5, 2009, page 9.

age. To do this, Martin and Florida argue that it will be necessary to adopt the following Agenda for Ontario's Creative Age:

“Ontario's distinctive advantage can be created through actions on four fronts:

- Broaden our talent base
  - Make Ontario the talent province
  - Strengthen our managerial capability
- Build province-wide geographic advantage
  - Make the mega-region as strong as it can be
  - Invest in connectivity
- Establish new social safety nets
  - Make early childhood development a high priority
  - Invest in skills development for recent immigrants
  - Consider wage insurance for longer tenure workers
- Harness the creative potential of Ontarians
  - Increase creativity in all jobs
  - Be the world's first jurisdiction where creatively-oriented occupations account for half of all jobs
  - Strengthen creativity skills through our education system
  - Market Ontario as a creative province
  - Make diversity a cornerstone of economic prosperity”<sup>11</sup>

Florida and Martin indicate that in order to pursue this agenda, it will be necessary to invest more fully in the development of skills that are necessary to adjust to the fact that “the shift we are seeing now is based fundamentally on human intelligence, knowledge, and collaborative skills.”<sup>12</sup> Indeed, they feel that it will be necessary to increase post-secondary education attendance rates among 18-24 year olds from 40% in 2007 to 60% in the future, if educational requirements for future jobs are to be met. The authors report that, based on current momentum, this figure is only expected to reach a maximum of 50% over the next 20 years. Therefore, it will be important to find ways to close the gap.

Along with the emphasis on postsecondary education, Florida and Martin cite Nobel Laureate James Heckman, who concludes that “early and later childhood environments are critical determinants of lifetime skills development. In fact, he has shown that a cost-benefit approach to skills investments shows that returns to skills development investment decline continuously throughout the aging process.”<sup>13</sup> Accordingly, based on the rate of return on investment at various ages in the life cycle depicted in the following diagram, Florida and Martin suggest that it will be necessary to apply more resources to ensure that children acquire the requisite skills for the new economic era from the earliest ages, since the early years are the formative years.<sup>14</sup>

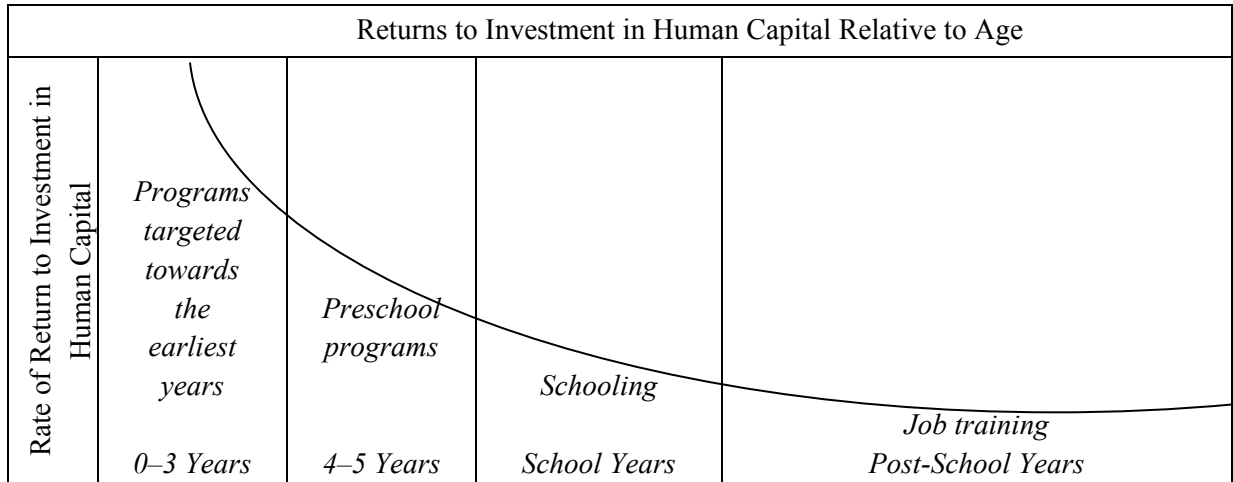
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<sup>11</sup> Source: Roger Martin and Richard Florida, Ontario in the Creative Age, February 5, 2009, page 3.

<sup>12</sup> Source: Roger Martin and Richard Florida, Ontario in the Creative Age, February 5, 2009, page 5.

<sup>13</sup> Source: Roger Martin and Richard Florida, Ontario in the Creative Age, February 5, 2009, page 24.

<sup>14</sup> It is worthy of note that in his State of the Union Address, United States President Barack Obama expressed the same sentiments, when he spoke about the responsibility of parents in the early socialization of children.



Source: Ontario in the Creative Age, page 25 from James J. Heckman, Schools, Skills, and Synapses, Discussion Paper No. 3515, Institute for Study of Labour, May 2008

In commenting on the Florida-Martin Report, Premier Dalton McGuinty said “we’ve got to continue to find ways to invest in our people, in their skills, in their education, and find better ways to harness their talents and their creativity.”<sup>15</sup>

Further validation for this emphasis came from the “State of the Union” address by President Barack Obama on February 24, 2009, when he indicated that one of the three greatest challenges that the United States faces is how to expand the promise of education in America. President Obama stated that “the countries that out-teach us today will out-compete us tomorrow. That is why it will be the goal of this administration to ensure that every child has access to a complete and competitive education – from the day they are born to the day they begin a career.”<sup>16</sup> Along with emphasizing the role of educators in assisting with making America more competitive, he challenged parents by stating that “there is no program or policy that can substitute for a mother or father who will attend those parent/teacher conferences, or help with homework after dinner, or turn off the TV, put away the video games, and read to their child. I speak to you not just as a President, but as a father when I say that responsibility for our children’s education must begin at home.”<sup>17</sup>

Recognizing the gravity of the current jobs crisis, which has been exacerbated by the financial crisis confronting the world, it would be imprudent for the LMG to presume to develop a labour market forecast in isolation from these kernels of wisdom from the highest authorities in the United States of America and our own Province of Ontario, which funds our activities. In addition, we have sought and obtained input on these important matters through various consultations over the past several months. Insights gleaned from these and a variety of statistical sources will constitute an integral component of this labour market forecast.

The philosophical foundation of our approach is based on a book written by Joel Barker entitled, *Paradigms: The Business of Discovering the Future*, in which Mr. Barker demonstrates that anticipation, innovation and

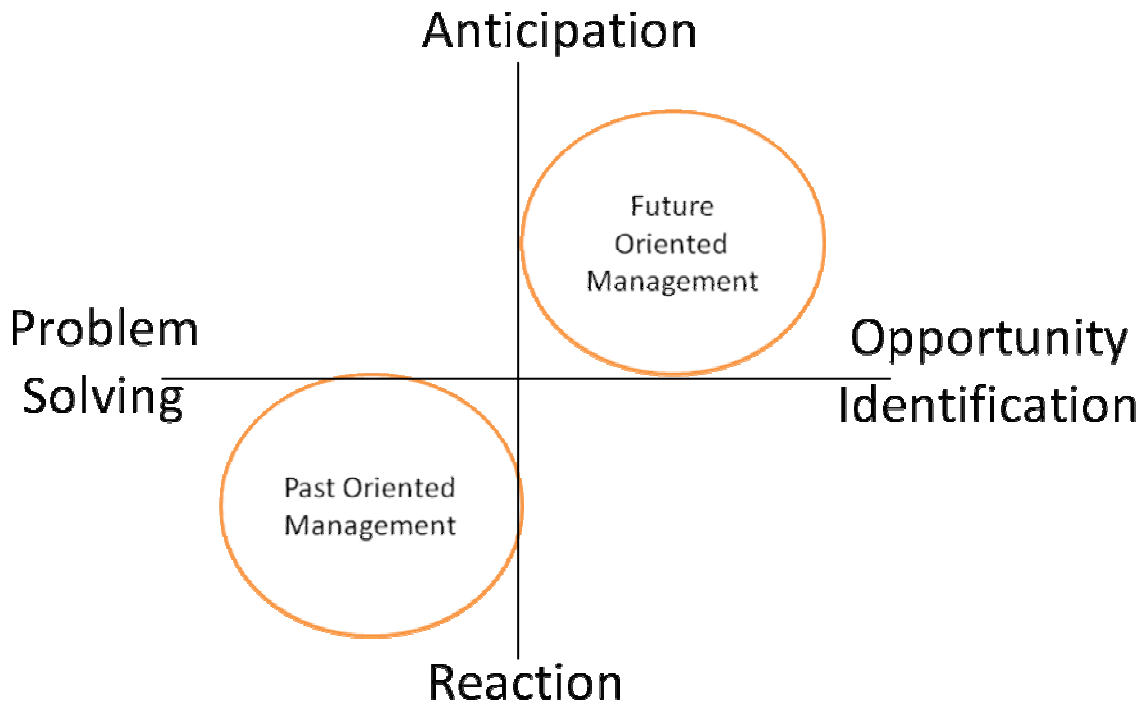
<sup>15</sup> Comment on Martin/Florida Report by Premier Dalton McGuinty as reported in the Globe and Mail article entitled, “Ontario needs a better brain trust,” Feb. 5, 2009.

<sup>16</sup> President Barack Obama, “State of the Union Address,” February 24, 2009.

<sup>17</sup> President Barack Obama, “State of the Union Address,” February 24, 2009.

excellence are the three keys to the future of any organization that wants to participate fully in the 21<sup>st</sup> century. Following extensive discussion on the merits of his approach, the following chart is employed to demonstrate the importance of moving from past oriented management styles, aimed at problem solving and reacting to situations, to future oriented management styles, aimed at problem avoidance and anticipating what is going to happen in the future. In considering the dramatic pace and magnitude of the changes that are affecting the labour force in North Bay and, indeed, the world, we must be committed to making every attempt to move as much of our thinking as possible into the upper right quadrant (on the page below) to ensure that we are “ahead of the pack,” instead of following it. In line with the wisdom of Albert Einstein, we recognize that “intellectuals solve problems, but geniuses prevent them.”

In discussing the Power of Paradigms, Barker states that “anticipation is the final element of the [innovation, excellence, anticipation] triad. This triad allows you to predict your customer’s needs, innovate the products or services required to fulfill them, and produce those products and services excellently. With these three attributes, you are ready not just to survive in the twenty-first century, but to thrive.”<sup>18</sup> In response to the question about the origins of good anticipation, Barker states clearly and simply that “Good anticipation is the result of good strategic exploration.”<sup>19</sup>



The preceding discussion is designed to set the stage for the balance of this report which identifies factors affecting demand for various occupations in the North Bay labour force over the next decade or two. We

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<sup>18</sup> Joel A. Barker, *Paradigms: The Business of Discovering the Future*, Harper Business Publishers, 1993, page 13.

<sup>19</sup> Joel A. Barker, *Paradigms: The Business of Discovering the Future*, Harper Business Publishers, 1993, page 28.

recognize that we cannot continue to apply the same paradigm that we have in the past if we are to achieve materially different results in the future. With the current economic realities we see facing the world today we must act to take advantage of the opportunities that will present themselves into the future, if we are to compete effectively with other areas to attract the right people for the right jobs in a rapidly changing labour force environment.

## Demographic Profile – City of North Bay<sup>20</sup>

Located approximately 330 kilometres north of Toronto, North Bay is a 3.5-hour drive north from Canada's largest population centre surrounding metropolitan Toronto. With a land area of 314.9 square kilometres and a population of 53,966, North Bay experienced modest population growth of 2.3% from 2001 to 2006. In comparison with other Northern Ontario communities of similar size such as Timmins (-1.6%) and Sault Ste. Marie (0.5%), North Bay's population growth was slightly above average. However, it was significantly lower than the population growth for the Province of Ontario (6.6%), which had much more robust population growth.<sup>21</sup>

## Age Characteristics

With regard to the age characteristics of the population, like other communities in Ontario, North Bay's population is aging, as the oldest members of the baby boom generation, (whose age range spans 42-63 years in 2009), will soon begin entering traditional retirement age. At 40.8, North Bay's median age is almost two years higher than the province of Ontario (39) and also higher than the City of Timmins (39.6), but somewhat lower than Sault Ste. Marie (43.9). A similar pattern exists with respect to the percentage of the population 15 years and over. At 83.5%, North Bay's 15+ population, which comprises 45,090 individuals, is higher than the province (81.8) and higher than Timmins (81.7), but still somewhat lower than Sault Ste. Marie (84.8). Therefore, North Bay's percentage of the population of individuals over the age of 15 years falls in between other Northern Ontario benchmarks, and is clearly higher than Ontario. The long-term trend exhibits an aging over time and this is expected to continue, given the preponderance in the population of those born between 1946 and 1966, along with current fertility rates in Ontario that are at or near historical lows.

There are a total of 15,470 families in North Bay, 10,195 of whom are married-couple families, while the remainder are common-law couples (2,435), female-led lone-parent families (2,290) and male-led lone-parent families (550). The average number of members in all census families in North Bay stood at 2.8 in 2006, which is comparable with Sault Ste. Marie (2.8), but somewhat lower than Timmins (2.9) and Ontario (3.0).

## Median Income

The table below presents information related to median income for various family types in North Bay, Timmins, Sault Ste. Marie, and Ontario. The median income for all census families in North Bay is \$58,602, which is the lowest of all benchmark communities. Sault Ste. Marie (at \$63,958) exceeds North Bay's median income for 'all census families' by \$5,356. Both Timmins (\$69,800) and Ontario (\$69,156) exceed North Bay's value in this category by more than \$10,000. Timmins' high median income in this category was driven materially by the high wages associated with a robust mining sector in that community. In fact, the median incomes for Timmins for all family types (except lone-parent families), exceed the Ontario values, which is unusual for Northern Ontario communities of this size, whose median incomes rarely match the Ontario average, let alone exceed it. The steel industry in Sault Ste. Marie also experienced steady growth from 2001 to 2006. In contrast, North Bay's economic composition is much more diversified and consequently, median income per capita is much less sensitive to upward and downward swings in single

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<sup>20</sup> Unless otherwise stated, the values presented in this demographic analysis pertain to the 2006 census.

<sup>21</sup> Where appropriate, the communities of Timmins and Sault Ste. Marie will be used as benchmark comparisons because they are located in Northern Ontario and also because they are closest in size to North Bay, with populations of 42,997 and 74,948, respectively. A comparison will also be made with Ontario to give readers a sense of broader provincial patterns.

industries. While this might be viewed as strength, it is, nevertheless, important to note, median income levels in North Bay tend to be quite a bit lower.

**Median Income**  
**All Census Families, Married-couple families, Common-law-couple, Lone-parent-families, Female lone-parent families, Male lone-parent families**  
**North Bay, Sault Ste. Marie, Timmins, Ontario**  
**2005**

Type of Family	North Bay (\$)	Sault Ste. Marie (\$)	Timmins (\$)	Ontario (\$)
All census families	58,602	63,958	69,800	69,156
Married-couple families	70,573	74,605	80,107	77,243
Common-law-couple	49,372	59,064	68,456	66,525
Lone-parent families	33,557	33,686	30,328	38,448
Female lone-parent families	31,102	29,830	29,140	36,496
Male lone-parent families	45,425	51,576	40,767	50,339

North Bay also has the lowest median incomes among the benchmark communities in the “Married-couple families” and “Common-law-couple” categories. However, lone-parent families in North Bay fare somewhat better than those in Timmins. North Bay (\$33,557) and Sault Ste. Marie (\$33,686) have comparable median incomes in the “Lone-parent families” category. Timmins (\$30,328) has the lowest value, while Ontario (\$38,448) has the highest. The gap between male and female earning power is quite apparent in the final two categories. In North Bay, male-led, lone-parent families (\$45,425) earn more than \$14,000 of additional yearly income in comparison to female-led lone-parent families (\$31,102). On a somewhat more positive note, female-led families in North Bay (\$31,102) fare slightly better than those in Sault Ste. Marie (\$29,830) and Timmins (\$29,140), but none in this category come close to meeting the provincial median income of \$36,496.

The table above suggests that an individual’s membership in a given family type has a material impact on the financial resources available to the family. As the table suggests, these differences can be significant. While lone parent families typically have slightly fewer members, such families have significantly lower median incomes. For instance, female-led lone parent families in North Bay have an average of 2.5 members and earn \$31,102, while male-led lone parent families contain 2.4 members, but earn \$45,425.

**Median Income  
by Household Type  
North Bay, Sault Ste. Marie, Timmins, Ontario  
2005**

	North Bay	Sault Ste. Marie	Timmins	Ontario
Couple Households with Children	80,628	90,192	88,914	87,960
Couple Households without Children	58,005	60,276	64,105	68,764
One-Person Households	22,622	22,278	22,889	30,025

The table above provides median income data on household types, as opposed to families per se. Using such categories permits a more detailed analysis of income patterns for various small social groups. Clearly, given the high cost of raising children, it is not surprising that Couple Households with Children exhibit the highest income patterns. In North Bay, such households earn \$80,628 and it is once again noteworthy that all other benchmarks exceed North Bay, some by almost \$10,000. Couple households without children earn much less at \$58,005. Other benchmarks saw similar reductions in the two groups – those with and those without children. One-person households earn the lowest median income in North Bay (at \$22,622), which is similar to other northern Ontario benchmarks, but considerably lower than Ontario at \$30,025.

### Housing Costs

Housing costs represent a significant expense for most workers. Statistics Canada collects information related to median monthly payments for rental housing and owner-occupied housing. Typical median monthly payments in North Bay are \$681 for a rental dwelling and \$892 for an owner occupied dwelling. Given North Bay's significant shortfall evident in many of the income categories relative to benchmarks, one might expect to see that North Bay's housing costs would be lower than benchmark communities or, stated alternatively, housing costs would be significantly higher in benchmark communities compared to North Bay. In fact, the opposite is true. Median monthly rental and owner occupied costs in Sault Ste Marie are \$590 and \$621, respectively, while in Timmins these costs are \$600 and \$818, respectively. These data reflect the sentiment often expressed in North Bay, that housing is expensive.

**Median Monthly Rental and Owner-Occupied Payments  
North Bay, Sault Ste. Marie, Timmins, Ontario**

	North Bay \$	Sault Ste. Marie \$	Timmins \$	Ontario \$
Median Monthly Rental Costs	681	590	600	801
Median Monthly Owner-Occupied Costs	892	621	818	1,046

### Language Characteristics

It is interesting that communities throughout the north (including the benchmark communities in this analysis) exhibit distinct Language Characteristics, despite other similarities in the areas of geography,

economy and culture. Statistics Canada tracks Language Characteristics by asking respondents about Mother Tongue, Knowledge of Official Languages, and Language Spoken Most Often at Home. Each mode tells us something useful about the Language Characteristics of a given community. However, as will be demonstrated below, Mother Tongue is perhaps the most useful because the language first learned tends to be cemented in a person’s linguistic constitution.

**Mother Tongue  
Percentage Speaking English, French, Both English and French and Other  
North Bay, Sault Ste. Marie, Timmins, Ontario**

	North Bay %	Sault Ste. Marie %	Timmins %	Ontario %
English	78.9	83.5	53.9	68.4
French	15.1	4.1	38.6	4.1
Both English and French	0.76	0.3	1.5	0.3
Other	5.28	12.1	5.9	27.2

The table above demonstrates the extent of variation that exists from one community to another, with regard to mother tongue characteristics. With 78.9% of North Bay residents citing English as their mother tongue, North Bay was only surpassed by Sault Ste. Marie with respect to percentage of residents listing English as mother tongue. North Bay also has a healthy segment of the population that lists French (15.1%) as their mother tongue. North Bay is thus characterized as a community with a rich linguistic tradition in both English and French, where slightly more than five per cent of the population lists “Other” mother tongues.

The last column in the table above, identifying the mother tongue of Ontario residents, demonstrates the significant impact that immigration has had on Ontario’s rapidly evolving ethno-linguistic identity. For instance, more than one-quarter (27.2%) of all Ontarians cite a language other than French or English as their mother tongue. Major metropolitan centres exhibit much higher values in this category, with 49% of the residents of the City of Toronto citing “Other” in mother tongue. Lastly, the data make clear how unusual it is for residents to cite both French and English as their mother tongue.

Statistics Canada also asks respondents about their knowledge of official languages. The data for North Bay reveal some interesting findings.

**Knowledge of Official Languages  
North Bay**

Knowledge of Official Languages	%
English Only	72.7
French Only	0.79
Both English and French	26.4
Neither English Nor French	0.09

In contrast to the data presented above regarding mother tongue, a relatively high percentage of the North Bay population (26.4%) reports that they have knowledge of both official languages, while less than one per cent indicate that they understand French only (0.79%). The number of individuals reporting that they understand neither English nor French is less than one-tenth of one percent. The number of individuals who understand English only is 72.7%.

When one examines the languages spoken most often at home, the entire complexion of the language issue morphs once again, as the following table suggests.

**Language Spoken Most Often At Home  
North Bay**

Language Most Often Spoken at Home	%
English	91.8
French	6.2
Non-official language	1.2
English and French	0.6
English and non-official language	0.2
French and non-official language	0.0
English, French and non-official language	0.0
TOTAL	100.0%

Despite the more than quarter of the population who understand English and French, it is clear from the above table that almost 92% of North Bay residents speak English in the home, while 6.21% speak French.

Thus it is clear from a discussion of language that North Bay's linguistic composition should be regarded as a strength in the labour market, given the number of businesses who value bilingual skills in order to reach and serve customers from various linguistic backgrounds.

## Ethnicity

Closely related to the issue of language is immigration. For the most part, North Bay’s population is made up of non-immigrants. In fact, 93.7% of all North Bayites are non-immigrants. Of the remaining 3,210 individuals who are immigrants, the majority (2,485) arrived prior to 1991, while 450 arrived between 1991 and 2000 and 270 arrived between 2000 and 2006. This means that over the past six years, North Bay has become home to approximately 45 immigrants per year. North Bay’s population also contains a very small number (160) of non-permanent residents.

Aboriginal Identity residents also figure into North Bay’s ethnic composition. Six per cent of North Bay residents report Aboriginal identity, whereas Sault Ste Marie (8.1%) and Timmins (7.7%) have a slightly higher percentage of residents of Aboriginal Identity. A much smaller percentage of Ontario’s population (2%) is of Aboriginal Identity.

**Aboriginal Identity Population  
As a Percentage of Total Population  
North Bay, S.S.M., Timmins, Ontario  
2006**

North Bay %	Sault Ste. Marie %	Timmins %	Ontario %
6.0	8.1	7.7	2.0

## Education

Data regarding Educational Attainment for Population 15+ is presented in the following table. It should be emphasized that in some categories, North Bay is comparable to benchmarks, especially in the “No certificate, diploma or degree” category, where North Bay (at 23.8%) has a lower value than both Sault Ste Marie (at 25.4%) and Timmins (at 31.6%), and is only slightly higher than Ontario (at 22.2%). Another area of similarity can be found in the “High school certificate or equivalent” category, where all communities have reasonably comparable attainment levels. Once again, the “Apprenticeship or trades certificate or diploma” category is another area of congruence, where North Bay (at 10.1%) comes in second to Timmins (at 11.3%), but exceeds both Sault Ste. Marie (at 9.3%) and Ontario (at 8%). Similarly, in the category of “College, CEGEP or other non-university certificate or diploma,” North Bay (at 23.1%) has a slightly higher rate of attainment than any of the other communities, including Ontario. The presence of Canadore College and other private career colleges go some way to explaining North Bay’s performance in the preceding attainment categories.

**Educational Attainment for Population 15+  
North Bay, Sault Ste. Marie, Timmins, Ontario  
2006**

Level of Education	North Bay %	Sault Ste. Marie %	Timmins %	Ontario %
No certificate, diploma or degree	23.8	25.4	31.6	22.2
High school certificate or equivalent	25.9	28.4	24.6	26.8
Apprenticeship or trades certificate or diploma	10.1	9.3	11.3	8
College, CEGEP or other non-university certificate or diploma	23.1	20.2	21.7	18.4
University certificate or diploma below the bachelor level	2.8	3.0	2.1	4.1
University certificate, diploma or degree	14.4	13.8	8.8	20.5

In the category of “University certificate or diploma below the bachelor level,” North Bay (at 2.8%), surpasses Timmins (at 2.1%), but both Sault Ste. Marie (at 3.0%) and Ontario (at 4.1%) exceed North Bay’s performance in this category. In the “University certificate, diploma or degree” category, North Bay (at 14.4%) exceeds the Northern Ontario benchmarks of Sault Ste. Marie (at 13.8%) and Timmins (at 8.8%). However, Ontario (at 20.5%) significantly outperforms the Northern Ontario communities in the category of University attainment, highlighting the deficit of university-educated individuals that has been observed in Northern Ontario for decades.

While the preceding table provides figures for the population 15 years of age and older, another key population to explore is the 25-34 population, who tend to be the most educated of all age cohorts due to the trend towards a continually increasing level of education amongst younger age cohorts and because this age cohort is likely to have completed its education.

**Educational Attainment for Population Aged 25-34 Years  
North Bay, Sault Ste. Marie, Timmins, Ontario  
2006**

Level of Education	North Bay %	Sault Ste. Marie %	Timmins %	Ontario %
No certificate, diploma or degree	10.2	9.9	13.2	8.7
High school certificate or equivalent	24.4	25.5	25.6	23.8
Apprenticeship or trades certificate or diploma	5.8	4.9	10.1	6.0
College, CEGEP or other non-university certificate or diploma	35.8	30.0	35.3	24.3
University certificate or diploma below the bachelor level	2.6	3.6	2.6	4.5
University certificate, diploma or degree	21.3	26.1	13.0	32.7

The difference between the educational attainment of the 15+ group and 25-34 group is quite astounding. Whereas, in North Bay among the 15+ group, 23.8% had achieved “No certificate, etc.,” this number was cut by more than half (to 10.2%) amongst the 25-34 age cohort. Among the benchmarks, reductions were similarly evident. Significant improvements were also evident in the “College, etc.” category, where 35.8%

of North Bayites aged 25-34 had achieved this credential versus 23.1% of the 15+ age cohort. Similar improvements were evident in the “University certificate, diploma or degree” category, where 21.3% of 25-34 year olds in North Bay achieved this credential compared to 14.4% of the 15+ age cohort.

The only category in which improvements were not evident is the “Apprenticeship or trades certificate or diploma” category. Among the 15+ population in North Bay, 10.1% had attained the “Apprenticeship, etc.” credential, but among the 25-34 year olds the value dropped to 5.8%, which suggests that this credential is not as popular among the 25-34 cohort as it was for previous generations. In fact, reductions in the “Apprenticeship, etc.” category were observed, to some degree, in every community, which reinforces the need to continue marketing efforts that encourage youth to pursue trades certifications. In so doing, North Bay may be successful in stemming the tide towards a retreat from a group of occupations that have historically offered highly attractive compensation packages.

It should be noted that the improvements in the university education category can be linked to the presence of a university located in North Bay. Nipissing University has consistently received high evaluations in student satisfaction surveys. It should also be noted that as many of 70% of Nipissing’s student population now hails from southern Ontario. Therefore, the data presented in the tables above may not be fully reflecting the full complement of the individuals who have been educated in North Bay because, upon graduation, many will have moved back to southern Ontario to be closer to their families and work opportunities. In fact, the same can be said of many individuals who grew up in North Bay, were educated at Nipissing, and, upon graduation, migrated to regions where work opportunities were more numerous. These two examples highlight an important issue with regard to the North Bay labour market. North Bay must provide better occupational opportunities to retain its post-secondary graduates. Otherwise, their skills and energies will be lost to the community.

### Low Income Cut Off

Instead of using a “poverty measurement,” Statistics Canada employs the Low Income Cut Off, that is designed to give readers a sense of the percent of individuals in certain populations that are subject to challenges associated with living on a restricted income. The table below details the “Per Cent in Low Income After Tax – All Persons.”

**Per Cent in Low Income After Tax – All Persons  
North Bay, Sault Ste. Marie, Timmins, Ontario  
2005**

North Bay %	Sault Ste. Marie %	Timmins %	Ontario %
12.0	9.7	8.4	11.1

It is of some concern that the percentage in North Bay exceeds that of all other benchmarks, but of even greater concern is the data presented in following table, which details low income percentages for individuals under the age of 18 years.

**Per Cent in Low Income After Tax – Persons Less Than 18 Years of Age**

**North Bay, Sault Ste. Marie, Timmins, Ontario  
2005**

North Bay %	Sault Ste. Marie %	Timmins %	Ontario %
14.3	14.1	11.0	13.7

Once again, North Bay leads all benchmarks in the percentage of children living in low income, although the differences between North Bay and Sault Ste. Marie and Ontario are marginal. Nevertheless, the fact that 14.3% of children under the age of 18 years in North Bay live in a low income category (after tax) is of considerable concern because such circumstances early in life are apt to have a portending effect on future educational and occupational mobility.

**Composition of Total Income**

The Composition of Total Income of a community is a useful category because it offers a glimpse into the sources of income that a community avails itself of for support and survival. As a general rule, it is best when Earnings are high and Government Transfers are low because this modality tends to characterize a productive society in which Gross Domestic Product is optimized and dependency on government is minimized. “Other Income” refers primarily to income from investments and is most closely associated with retired persons. Therefore, the “Other Income” value is likely to be higher for communities that have comparatively more individuals who are retired.

**Composition of Total Income  
North Bay, Sault Ste. Marie, Timmins, Ontario  
2006**

	North Bay %	Sault Ste. Marie %	Timmins %	Ontario %
Earnings as% of total income	69.6	68.2	77.1	77.4
Government transfers as% of total income	14.7	15.3	12.9	9.8
Other income as% of total income	15.7	16.6	10.0	12.9

“Earnings as% of total income” for North Bay (69.6%) and Sault Ste. Marie (68.2%) are similar; however, Timmins (at 77.1%) and Ontario (at 77.4%) both have considerably higher “Earnings as a% of total income,” which suggests that the latter populations tend to be more productive than the former.

Typically, “Government transfers as a Per Cent of total income” are much higher in communities with lower “Earnings, etc.” Consequently, North Bay (at 14.7%) and Sault Ste. Marie (at 15.3%) lead in the “Government transfers, etc.” category, which indicates that North Bay and Sault Ste. Marie are more reliant on government transfers than Timmins (at 12.9%) and especially than the Ontario population as a whole, where only 9.8% of total income is comprised of government transfers.

The relatively mature nature of the population in North Bay and Sault Ste. Marie – and their residents’ reliance on investment income - is reflected in the “Other income as% of total income” category, where North Bay (15.7%) and Sault Ste. Marie (16.6%) lead, in comparison to Timmins (10%) and Ontario (12.9%), where “Other Income” is lower on account of lower median ages (see “Age Characteristics” above) and fewer retirees in the two latter communities. For instance, in North Bay, 16% of the population is greater than 65 years of age, whereas in Timmins only 12.7% of the population is greater than 65 years of age. Such demographic differences tend to influence the income distribution variations that are evident in the preceding table.

## Occupational Profile

The occupational profile presented in the following table compares 2001 and 2006 occupational data to give readers of sense of how occupational patterns in North Bay have evolved over time in recent years.

**North Bay Occupational Profile  
As a Percentage of Total Occupations  
2001 & 2006**

	2001 %	2006 %
Management Occupations	11.0	9.6
Business, Finance and Administration Occupations	17.7	17.6
Natural and Applied Sciences and Related Occupations	5.2	4.7
Health Occupations	6.3	6.7
Occupations in Social Science, Education, Government Service, Religion	8.8	10.1
Occupations in Art, Culture, Recreation and Sport	2.3	1.9
Sales and Service Occupations	30.8	30.7
Trades, Transports and Equipment Operators and Related Occupations	14.0	14.4
Occupations Unique to Primary Industry	1.3	1.5
Occupations Unique to Processing, Manufacturing and Utilities	2.7	2.7

The most significant decreases clearly occur in the first category, Management Occupations, where, in 2001, 11% of all jobs were in this category, compared to 2006 when only 9.6% of all jobs were in the Management category. Other less dramatic decreases occurred in Natural and Applied Sciences and Related Occupations, which dropped from 5.2% in 2001 to 4.7% in 2006, and in Occupations in Art, Culture, Recreation and Sport, which dropped from 2.25% in 2001 to 1.9% in 2006.

In contrast, increases over time were seen in Health Occupations, which grew from 6.3% in 2001 to 6.7% in 2006, along with Occupations in Social Science, Education, Government Service and Religion, which grew from 8.8% in 2001 to 10.1% in 2006, largely due to growth in the Educational sector. Somewhat more modest increases also occurred in Trades, Transport and Equipment Operators and Related Occupations which grew from 14.0% in 2001 to 14.4% in 2006, along with Occupations Unique to Primary Industry, which comprised 1.28% of all jobs in 2001, but later grew to 1.5% in 2006.

All other occupations either experienced no change or experienced negligible movement between 2001 and 2006.

## North Bay Labour Market Survey

The North Bay LMI questionnaire was developed by Lawlor & Associates Consultants Inc, in consultation with personnel from the Labour Market Group and ten mature interviewers, who consisted of retired professionals from a variety of industry sectors. Following completion and review of several drafts of the questionnaire by the consultant, it was reviewed carefully by LMG personnel and appropriate changes were made. Then several meetings were held with the interviewers and each question was discussed carefully to ensure that there was no confusion and that the full range of potential responses was included on the questionnaire. Again, appropriate changes were made. Following this, meetings were held with five human resource professionals, representing larger employers in North Bay, to seek their input and ensure that any concerns that they might have were addressed. Appropriate modifications were made to reflect their input.

At this point, teams of two interviewers conducted several interviews with local area employers, to pilot test the interview schedule. Following this, another meeting was held to incorporate changes and amend the interview schedule before final copies were printed.

Personnel from the LMG identified, contacted and arranged appointments with local area employers. Every effort was made to ensure that all industry sectors were represented in the sample, by involving knowledgeable representatives of the LMG Technical Advisory Committee in the employer-targeting component. A total of 234 employers were contacted and asked to participate. Interviews were completed with 147 of the 159 employers who agreed to be interviewed, representing a completion rate of 62.8% of the total number contacted. This is an exceptionally high rate within the research industry, providing confidence that there is little likelihood of systematic bias in the sample.<sup>22</sup> It should be emphasized that the LMG committee adopted a quota sampling approach, designed to ensure that all sectors that were considered to be important were represented in the sample, rather than a simple random, probability sample. Although the latter was considered, the LMG felt that it was more important to ensure that a range of small, medium and large employers from various key industrial sectors in the community were represented to obtain the necessary data. As a result, it was decided that it would be desirable to conduct a sufficient number of interviews to ensure that 50% of the total employment base in the community was represented in the study. As discussed below, this was achieved. This would not have been practical had a large number of the interviews been conducted with businesses with only several employees.

During the data analysis phase of the project, sources of error were rigorously controlled to ensure the internal reliability of the data. Qualitative responses were stringently coded with respect to all forms of response. For example, all occupations were assigned National Occupational Codes during the data input process. Using these NOC definitions, all positions were coded by the researcher. Permitted response typically remained either binary (Yes/No), or trinary (Yes/No/Not Applicable). In several cases, more than three responses were permitted to allow the researcher to explore more fully areas of interest. In only one of

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<sup>22</sup> It should be emphasized that a deliberate effort was made by the selection group to ensure the inclusion of a large number of manufacturing employers in the study.

these cases was the number of potential responses permitted to be larger than seven. Where appropriate, multiple responses were permitted, thereby allowing the respondent to more clearly articulate their desired response. This approach assisted in minimizing sources of respondent error, thus generating high internal reliability, because large numbers of potential responses have typically resulted in difficulties with generating useful information on the universe of data, while concurrently representing a point of greater confusion for the respondents.

As for the validity of the LMI survey and its conclusions, again sources of potential error were identified and hence reduced to a minimum. With respect to the number of employers who were studied, the large sample size (62.8% of employers contacted actually participated in the study, representing more than 50% of total employment in the City of North Bay) offsets the potential flaws of a quota sample. Rarely can a population be sampled so thoroughly. Hence, given the size and scope of the sampled population, any effects of quota sampling were minimized. We found no evidence of data distortion, based on sample bias. Indeed, in reviewing the businesses that responded, in comparison with those who did not, we found that businesses and organizations in every sector were represented in both those who responded, as well as those that did not.

The external validity of the LMI survey can be judged and verified through comparison and apparent symmetry with the Statistics Canada data, with respect to the known statistics on various sectors represented in the North Bay labour force. By comparison again, the data that are herein presented stand reified by the Statistics Canada data, once again demonstrating the confidence, respecting good reliability and validity, which we have in the data obtained in this study. The table below demonstrates that the businesses surveyed for the LMI project generally reflect the industry breakdown of North Bay, as provided by Statistics Canada. It should be emphasized that the large representation from the manufacturing sector in the North Bay sample was a result of a deliberate effort in the sampling process to focus on an area that was considered to be particularly important by several members of the Technical Advisory Team.

**NAICS Sectors as a Percentage of Total Employment in North Bay  
Comparison of Statistics Canada Data (2006) and LMI Sample (2008)<sup>23</sup>**

NAICS Statistics Canada (2006) North Bay	Sector as% of Total Employment	Industrial Sectors, LMI Study (2008) North Bay	Sector as% of Total Employment	Difference
Agriculture & Other Resource Based Industries	2.2	Agriculture & Other Resource Based Industries	5.1	2.9
Construction	5.1	Construction	8	2.9
Manufacturing	5.7	Manufacturing	13.1	7.4
Wholesale Trade	2.8	Wholesale Trade	2.3	-0.5
Retail Trade	14.8	Retail Trade	11.3	-3.5
Finance and Real Estate	4.6	Finance and Insurance Real Estate & Rental & Leasing	7.5	2.9
Healthcare and Social Services	13.4	Health Care and Social Assistance	8.5	-4.9
Educational Services	8.4	Educational Services	7	-1.4
Business Services	19.9	Utilities Transportation and Warehousing Information and Cultural Industries Professional, Scientific & Technical Services Management Of Companies & Enterprises	16	-3.9
Other Services	23.1	Other Services Administrative & Support, Waste Management & Remediation Services Arts, Entertainment & Recreation Accommodation & Food Services Public Admin	21.1	-2.0
Total Labour Force over 15	100.0		99.9	

To obtain confidence in the representativeness of the data that was collected for the North Bay Labour Market Survey, additional data on several variables in the survey was compared with Statistics Canada data from the 2006 Census of Canada. Statistics Canada census data indicate that 50% of the North Bay labour force was over 40 years, while data for the local survey indicate that 52.8% of 1,025 employees for whom date of birth data was provided are over 40 years.

In a second area we found that 9.3% of our sample were licensed (81) or unlicensed (33) tradespeople. This compares with about 10% based on Statistics Canada data for 2006.

<sup>23</sup> It should be emphasized that to create the data for this table, it was necessary for the researcher to collapse some of the data collected for the North Bay LMI study, in order to be able to make useful comparisons with the Statistics Canada Data. Early on during the research process, the Technical Advisory Committee made a decision to group sectors into a greater number of discrete categories, thus necessitating, for the creation of this table, the collapsing of such data into categories more closely resembling the NAICS system used by Statistics Canada. It should also be noted that, by collapsing the data, useful comparative observations can be made between the two sets of data, which demonstrates, for the most part, that these two sets of data are strikingly similar.

Thirdly, the LMI Survey contained 775 employees, who were full-time and 272, who were part-time. For full-time employees in the LMI Survey, the average salary was \$47,188 in 2008. Based on 2005 Statistics Canada salary data for North Bay, full-time employees had median salaries of \$40,948, which is somewhat lower than salaries revealed through the LMI Study. The first observation with respect to this modest anomaly between the LMI Study and Statistics Canada data involves a methodological decision to use mean (average) salary for the LMI, instead of median salary, which is used in the Statistics Canada salary data. Mean (average) and median can often generate different values, even if the data sets were identical (which they are not). However, when a 3% annual inflation factor is added to the 2005 Statistics Canada figure of \$40,948 for a three-year period, the 2008 median Statistics Canada salary becomes \$44,744, which moves this figure closer towards the LMI Survey average wage of \$47,188. Also, the fact that manufacturing jobs were highly represented in our survey, as a result of the quota sampling techniques that were used, accounts for the slightly higher average salaries in the local data, since manufacturing jobs typically have higher incomes than many other jobs in the local economy.

Based on this methodological, comparative exercise with Statistics Canada data, we are confident that the local data generated through interviews provides a fair and accurate snapshot of the employment picture in North Bay for the time period when the data was collected.

One issue that is deserving of special attention pertains to information requested about employees, consisting of their age and their projected date of retirement. In this area, some respondents refused to provide information, while many others provided incomplete data. Thirty-seven out of 147 employers responded to this question, but some failed to provide complete data, making it difficult to use the data effectively. For this reason, a decision was made to acquire Statistics Canada data for the City of North Bay, based on the 2006 Census of Canada. With this demographic data, and by employing assumptions, it was possible to make estimations for all occupations, trades and professions regarding rates of retirement over the next 5 – 20 years, thereby providing insight into occupational opportunities that will open up for new entrants into the labour force over the next two decades, as older workers retire. This data also sheds light on the training required to prepare young people for these employment positions.

### **North Bay LMI Survey Results**

Based on Statistics Canada data, the total size of the North Bay labour force is 29,400. The 147 employers, who were interviewed for the study in the Summer of 2008, employed a total of 15,544 individuals, representing 52.9% of the total employment base in the City of North Bay, as identified by Statistics Canada. Of these positions, 11,128 (71.6%) were full-time, while 4,416 (28.4%) were part-time.

One of the objectives of the study was to estimate future demand within given occupations and industry sectors. Therefore, employers were asked to provide information on how many full-time and part-time employees they expected to employ within the next two years and the next five years. Based on the LMI Survey data, total full-time employment is anticipated to grow by 3.4% over the next two years, for an annual growth rate of approximately 1.7%. Over the next five years, total full-time employment is projected to grow by a total of 7.0% from current levels, for an annual growth rate of approximately 1.4%.

Expected growth (Retrenchment) patterns for full-time employment in various sectors over the next two years and the next five years were as follows:

**Employers' Estimated Full-Time Employment Growth/(Retrenchment)  
Forecasting Two and Five Years Out, by Occupation  
LMI Study, Base Period, Summer 2008**

Sector	Current Jobs, Base Period (2008)	Estimated Full-Time Jobs in Two Years	% Growth by 2010	Estimated Full-Time Jobs in Five Years	% Growth by 2013
Agriculture, Forestry, Hunting & Fishing	88	127	44.3	127	44.3
Mining & Oil & Gas Extraction	833	1051	26.2	1237	48.5
Utilities	534	534	0.0	534	0.0
Construction	1045	1116	6.8	1142	9.3
Manufacturing	1614	1815	12.5	1922	19.1
Wholesale Trade	42	48	14.3	52	23.8
Retail Trade	794	863	8.7	1020	28.5
Transportation & Warehousing	225	242	7.6	202	-10.2
Information & Cultural Industries	501	523	4.4	525	4.8
Finance & Insurance	290	323	11.4	335	15.5
Real Estate & Rental & Leasing	431	432	0.2	433	0.5
Professional, Scientific and Technical Services	1486	1645	10.7	1745	17.4
Management of Companies and Enterprises	84	104	23.8	106	26.2
Admin. & Support Waste Management & Remediation Services	469	485	3.4	488	4.1
Educational Services	2792	2207	-21.0	2093	-25.0
Health Care and Social Assistance	2058	2159	4.9	2155	4.7
Arts, Entertainment & Recreation	545	548	0.6	548	0.6
Accommodation & Food Services	239	251	5.0	258	7.9
Other Services (except Public Administration)	748	889	18.9	1012	35.3
Public Administration	1355	1360	0.4	1368	1.0
TOTAL All Sectors <sup>24</sup>	16173	16722	3.4	17302	7.0

It should be stated that this data was collected prior to the global financial crisis that has precipitated a wave of lay-offs, especially in the mining manufacturing sector (but certainly among other sectors too). Thus, these forecasts should be approached cautiously, given that employers were providing such forecasts without the benefit of advance knowledge of the global financial crisis. The data, however, suggest that prior to the credit-crunch meltdown, employers were anticipating remarkable growth in Agriculture, Forestry, Hunting & Fishing (44.3% over two years), Mining & Oil & Gas Extraction (26.2% over two years), Manufacturing (12.5% over two years), Wholesale Trade (14.3% over two years), Finance & Insurance (11.4% over two years), Professional, Scientific & Technical Services (10.7% over two years), Management of Companies and Enterprises (23.8% over two years), and Other Services (except Public Administration), which is anticipated to experience full-time employment growth of 18.9% over the next two years.

<sup>24</sup> The larger number of full-time workers showing in these totals result from the fact that some employers indicated that they were involved in more than one sector. In such cases their employment was double counted, leading to the larger total from the actual number of 11,128 full-time employees identified in the survey.

The following table provides information on the size of the organizations that were surveyed<sup>25</sup>.

**Size of Respondent Organizations  
LMI Study, 2008**

Size of Organization	Frequency	Percent of Total
Small (1-15 employees)	37	25.2
Medium (16-50 employees)	56	38.0
Large (51+ employees)	53	36.1
Not Stated	1	0.7
TOTAL	147	100.0

The following table provides data on the number and percentage of first generation immigrants among the 15,544 employees employed by 147 organizations. The data indicate that 43.4% of those who answered the question employed some first generation immigrants, although, in most cases, the percentage of first generation immigrants was between one per cent and ten%. This is in keeping with local knowledge and Statistics Canada data on the number of first generation immigrants within the community.<sup>26</sup>

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<sup>25</sup> The relatively modest presence of small (1 – 15 employees) employers in the sample was due to selection factors, since efforts were made to ensure the selection of a larger percentage of medium and larger employers, based on the quota sampling selection criteria that were employed to ensure the inclusion of information on 50% of total local area employees in the study.

<sup>26</sup> The 2006 Census of Canada reported that 7.4% of the population over the age of 15 years comprised first generation immigrants.

**First Generation Immigrants as Percentage of Organization Workforce  
2008**

Percentage of First Generation Immigrant Employees	Frequency	Percent of Total
None	73	56.6
1 - 10%	43	33.3
11 - 20%	5	3.9
21 - 30%	0	0.0
31 - 40%	0	0.0
41 - 50%	1	0.8
More than 50%	6	4.7
Uncertain	1	0.8
Sub-total	129	100.0
Not Stated	18	
<b>TOTAL</b>	<b>147</b>	

As the following table demonstrates, the percentage of employers who employ First Nations people is similar, with 48.1% (or 64 of 147 employers) indicating that they employ no First Nations people, while the remainder employ individuals of First Nations heritage, who, for the most part, make up between one and ten per cent of the employees in these organizations. More than half of the respondents indicated that they employ First Nations workers in their organizations.

**First Nations Peoples as Percentage of Organization Workforce,  
2008**

Percentage of First Nations Employees	Frequency	Percent of Total
None	64	48.1
1 - 10%	61	48.1
11 - 20%	7	5.3
Uncertain	1	0.8
Sub-total	133	100.0
Not Stated	14	
<b>TOTAL</b>	<b>147</b>	

Information on those who employ people with disabilities is as follows, although it should be emphasized that this question is somewhat equivocal, since interpretations of the term “person with disability” vary from person to person.

**Persons With Disabilities as Percentage of Workforce  
2008**

Percentage of Persons with Disabilities	Frequency	Percent of Total
None	81	62.4
1 - 10%	44	33.8
11 – 20%	5	3.8
Uncertain	0.0	0.0
Sub-total	130	100.0
Not Stated	17	
TOTAL	147	

A total of 127 respondents indicated that they would be interested in hiring people with foreign credentials if suitable candidates were available, while only 5 indicated that they would not. Fourteen indicated that they were uncertain.

The advantages that employers identified in hiring immigrants are detailed in the following table. Respondents tended to emphasize the ability to access a range of skilled personnel (46.5%) and the “Work Ethic” (40.3%, earning second spot) that is characteristic of first generation immigrants. Following the highest rated advantages came “Range of Language Skills”, Loyalty/Low Turnover, and High Productivity.

**Respondents’ Views Regarding Advantages of Hiring Immigrants**

Advantages of Hiring Immigrants	Frequency	Percent
Ability to access a range of skilled personnel	67	46.5
Work Ethic	58	40.3
Range of Language Skills	40	28.5
Loyalty/Low turnover	39	27.1
High Productivity	33	22.9
Other	27	18.8
High Levels of Education	19	13.2
TOTAL <sup>27</sup>	287	

Ironically, the variable with the lowest frequency above, High Levels of Education, is the variable with extremely strong quantitative validation, according to Statistics Canada data. Approximately 70% of all immigrants have at least some post-secondary education upon arrival in Canada. In fact, the Census is unequivocal with regard to the high levels of education characteristic of current, first-generation immigrant populations in Canada. This trend is driven primarily by the immigration criteria established by the federal government, which places a very high premium on university education in its assessment of successful immigration applications. The low premium which employers in the study place on high levels of education among immigrants, either means that employers place little value on this characteristic, or it suggests that employers are perhaps unaware that immigrants possess such high levels of educational credentials. Another possibility could be related to the difficulty of evaluating foreign credentials, that is cited below by 42

<sup>27</sup> The total exceeds 147 because respondents were invited to provide more than one advantage, if appropriate.

respondents. This finding suggests that organizations whose mission it is to assist immigrants integrate into their chosen community may wish to explore the merits of promoting such high levels of credentialization to prospective employers, in their efforts to assist immigrants to secure employment that fully optimizes immigrants’ high educational attainment.

A variety of reasons were given concerning the disadvantages of hiring immigrants. They were as follows.

Disadvantages of Hiring Immigrants	Frequency	Percent
Language Barriers	108	75.0
Difficulty in Evaluating Foreign Credentials	42	29.2
Lack of Familiarity with the Culture	26	18.1
Resistance from the Current Workforce	14	9.7
Low Productivity	1	0.7
Cost/Time Associated with Bringing in Foreign Candidates	22	15.3
Other	25	17.4
TOTAL <sup>28</sup>	242	

The high rates of response for “Language Barriers” is surprising, given the high rates of education that are characteristic among immigrant populations, meaning that the immigrant workers are more likely today than ever to speak, read and write English upon their arrival in Canada. The findings for “Language Barriers” again suggest a time lag, and hearken back to a time when immigrants were, for the most part, poorly educated and unable to speak English. There may also exist a gap between the perceptions of respondents and actuality. Again, this suggests a marketing opportunity for local immigrant organizations, who could promote high educational levels and language skills to prospective employers.

Among other disadvantages, “Difficulty in Evaluating Foreign Credentials” also ranks highly at 29.2%, though not nearly as high as the first disadvantage, discussed in the foregoing paragraph. “Lack of Familiarity with the Culture,” and “Cost/Time Associated with Bringing in Foreign Candidates” were cited by approximately equal number of responses. Lastly, “Resistance from Current Workforce”, received 9.7% of responses, which input is interpreted as candid and direct respondent feedback, though it should be stated that no conclusions can be made regarding whether respondents are speculating on the reactions of workers or whether respondents have historical first-hand knowledge of the reactions to immigrant workers from existing staff.

When asked to provide information on the types of occupations for which they are experiencing difficulty in hiring qualified people at the present time, employers identified a total of 211 positions, representing 111 NOC Codes.

Fields in which most difficulty was identified in hiring qualified people at the present time included the following. A detailed list of specific positions is included in Appendix B.

**Fields in which Employers are Experiencing Difficulty in Hiring Qualified People at Present**

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<sup>28</sup> The total exceeds 147 because respondents were invited to provide more than one advantage, if appropriate.

	Frequency
Mechanically Related Occupations	38
Engineering & Architectural Related Occupations	33
Tradespeople and Helpers	31
Health Related Occupations	24
Financially Related Occupations	18

In line with the federal government's estimation that 70% of all future jobs created in Canada will require some kind of post-secondary education,<sup>29</sup> employers confirmed that 32.1% of the 212 jobs in which they are currently experiencing difficulty in finding qualified candidates require a university degree, while 19.3% require a college diploma. A further 25% require a certificate. On the job training is provided for the remaining 23.6%.

The questionnaire then proceeded to collect information from employers concerning the number and type of trades employees in their employ. Based on the survey data, the total number of journeypersons employed by the 61 employers who had journeypersons was 618. A total of 72.1% of those who had journeypersons employed fewer than 10 journeypersons each.

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<sup>29</sup>Source: Bob Rae, "Ontario: A Leader in Learning", pg. 69  
<http://74.125.95.132/search?q=cache:bfQYWWNerMQJ:www.edu.gov.on.ca/eng/document/reports/postsec.pdf+%22Ontario%22+A+Leader+in+Learning%22+Rae&cd=1&hl=en&ct=clnk&client=safari>, (accessed March 15, 2009) and Richard Florida and Roger L. Martin, Ontario in the Creative Age, 2009, page 8.

**Number of Licensed Journeypersons Employed by Respondents**

Number of Journeypersons employed in the Organization	Number of Organizations	Percent of Total	Total Number of Journeypersons
1	6	9.8	6
2	6	9.8	12
3	7	11.5	21
4	6	9.8	24
5	7	11.5	35
6	6	9.8	36
8	2	3.3	16
9	1	1.6	9
10	3	4.9	30
12	1	1.6	12
14	2	3.3	28
15	4	6.6	60
17	1	1.6	17
20	1	1.6	20
24	2	3.3	48
27	1	1.6	27
32	1	1.6	32
35	1	1.6	35
50	1	1.6	50
100	1	1.6	100
No Journeypersons	86		
<b>TOTAL</b>	<b>147</b>	<b>100%</b>	<b>618</b>

The findings for unlicensed tradespeople were somewhat different, since there were more organizations with much larger numbers of unlicensed tradespeople, as the following table demonstrates. A total of 930 unlicensed trades people were employed by the 47 organizations who indicated that they had unlicensed tradespeople.

**Number of Unlicensed Tradespeople Employed by Respondents**

Number of Unlicensed Tradespeople	Number of Organizations	Percent of Total	Total Number of Unlicensed Tradespeople
1	7	14.9	7
2	7	14.9	14
3	3	6.4	9
4	2	4.3	8
5	2	4.3	10
6	4	8.5	24
7	1	2.1	7
8	1	2.1	8
10	2	4.3	20
12	2	4.3	24
14	1	2.1	14
15	1	2.1	15
16	1	2.1	16
24	1	2.1	24
25	1	2.1	25
29	2	4.3	58
36	1	2.1	36
40	2	4.3	80
45	1	2.1	45
50	1	2.1	50
60	1	2.1	60
69	1	2.1	69
99	1	2.1	99
208	1	2.1	208
Not Applicable	100		
<b>TOTAL</b>	<b>147</b>	<b>100%</b>	<b>930</b>

A total of 43 of the 147 employers (29.3%) indicated that they engaged apprentices. However, employers did not express as much familiarity as one might expect with the financial incentives provided by the Ministry of Training, Colleges and Universities, that encourage employers to engage apprentices, as the following table demonstrates.<sup>30</sup>

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<sup>30</sup> It should be noted that a brochure on the Ontario Apprenticeship Program was offered to respondents who indicated that they did not a high level of familiarity with the program.

**Respondents' Level of Familiarity with Apprenticeship Financial Incentives**

Level of Familiarity with Financial Incentives	Frequency	Percent of Total
Very Familiar	20	20.4
Somewhat Familiar	38	38.8
Not at all Familiar	18	18.4
Not Applicable	22	22.4
Sub Total	98	100.0
No Response	50	
TOTAL	147	

The LMI Survey revealed that only 31 respondents of the 43 (who indicated they had engaged apprentices) had taken advantage of the Ontario Ministry of Training, Colleges and Universities apprenticeship incentive programs. Since a total of 70 respondents employ licensed tradespeople, the number of organizations that engage apprentices (at 43) seems relatively low.

Most of the respondents indicated that they employ fewer than five apprentices, as the following table demonstrates. Only five organizations had more than 15 apprentices, suggesting a need to promote the program even more aggressively. The total number of apprentices was 156.

**Number of Apprentices Currently and Expected Number of Apprentices in Two and Five Years**

Number of Apprentices	Number of Organizations Currently Engaging Apprentices	Percent of Total	Total Number of Apprentices Currently	Number of Organizations Next Two Years	Percent of Total	Total Number of Apprentices Two Years	Number of Organizations Next Five Years	Percent of Total	Total Number of Apprentices Five Years
1	11	29.7	11	8	23.5	8	8	24.2	8
2	11	29.7	22	12	35.3	24	9	27.3	18
3	5	13.5	15	4	11.8	12	3	9.1	9
4	4	10.8	16	6	17.6	24	5	15.2	20
5	0	-	-	2	5.9	10	4	12.1	20
6	1	2.7	6	1	2.9	6	1	3.0	6
8	0	-	-	0	0.0	0	1	3.0	8
10	0	-	-	0	0.0	0	1	3.0	10
15	2	5.4	30	0	0.0	0	0	0.0	0
17	1	2.7	17	1	2.9	17	0	0.0	0
19	1	2.7	19	0	0.0	0	0	0.0	0
20	1	2.7	20	0	0.0	0	0	0.0	0
25	0	-	-	-	-	-	1	3.0	25
Sub total	37			34			33		
N/R	110			113					
TOTAL	147	100	156	147	100	101	114	100	124

As expected, large organizations (71.8%) employ the largest number of apprentices, while 19.9% are employed by medium-sized organizations. Only 8.3% are employed in small organizations.

In the next two years, a total of 34 employers indicated that they plan to engage apprentices, a slight decrease compared to the 37 employers who currently employ apprentices. Most of them indicated that they planned to hire fewer than six apprentices. Only one indicated an intention of hiring more than this (17). However, it is significant to note that respondents expressed plans to engage a total of only 101 apprentices over the next two years --- a decline of 35.3%. The most notable decline was among the large employers, whose percentage representation fell from 71.8% to 59.4%.

Another area of concern centers on the fact that a total of five large employers currently employ 86 of 156 apprentices (55.1%). The concern here relates to the fact that the apprenticeship system in North Bay appears to be heavily dependent on a very small number of rather large employers. If for any reason these large employers were to reduce the number of apprentices in their employ, or were to cease altogether taking on apprentices, North Bay's apprenticeship prospects would decline considerably. Given the critical significance of these large employers in making apprenticeship work in North Bay, it is absolutely essential that apprenticeship proponents delve more deeply into understanding apprenticeship within the context of a large organization, to see if there are lessons that can be learned to help other employers avail themselves of the benefits of apprenticeship, but also to gain a better sense of prospects of apprenticeship, as seen through the eyes of employers who play such a pivotal role in making this skills-transfer system successful.

A similar pattern of response was found concerning the intentions of employers to engage apprentices over the next five years. A total of 33 indicated that they expected to be engaging apprentices over the next five years, but only one expected that the number of apprentices to be engaged would be more than 10 (25). The total number of apprentices that employers expected to hire over the next five years was 124.

To obtain an indication of the challenges associated with encouraging employers to participate more fully in apprenticeship training, they were asked to provide an indication of the major challenges associated with engaging apprentices. The following table is quite instructive in providing insights.

**Major Challenges of Engaging Apprentices as Identified by Employers**

Major Challenges with Apprenticeships	Number of Organizations	Percent of Cases
Finding Motivated People as Apprentices	18	20.9
Not Enough Journeypersons to Supervise Apprentices	11	12.8
Lack of Emotional Maturity	11	12.8
Apprentices Leave Following Training	9	10.5
Concerns about Safety and Risk Exposure	6	7.0
Requirement to Release Apprentices to Go Out of Town	4	4.7
Union Resistance	4	4.7
Ratio of Apprentices to Journeypersons	4	4.7
Reporting Requirements/Paperwork	3	3.5
Cumbersome Legislation/Bureaucratic	3	3.5
None	8	9.3
Sub-total	86	100.0
Not Applicable/No Response	61	70.9
TOTAL	147	

Of the 86 organizations that addressed this question, it is interesting to note that only 9.3% indicated “None.” Thus, the vast majority of employers stated that there were some challenges, at least, including, “Finding Motivated People as Apprentices” (20.9%) and “Lack of Emotional Maturity” (12.8%) and “Not Enough Journeypersons to Supervise Apprentices” (12.8%) and “Apprentices Leave Following Training” (10.5%). The remaining challenges were cited by less than 10% of respondents. As the table above demonstrates, 86 organizations responded to this question, but only 61 organizations employed licensed tradespeople. Of these only 43 organizations indicated that they are currently employing apprentices, which would suggest, along with the foregoing forecasting data indicating that a declining number of employers intend to hire apprentices in the next two and five-year periods, that the challenges identified above are clearly, at least in part, determinative of respondents’ decision to forego hiring apprentices. Given the pivotal role that apprenticeship has played historically, as a means by which important process and knowledge skills are relayed from one generation to the next – it is absolutely crucial that various stakeholders communicate to determine the optimal means by which apprenticeship can be made to work for the 21<sup>st</sup> century.

On the positive side, when asked about their level of satisfaction with apprentices, with respect to their ability to fill positions effectively in the employer’s organization, the following table indicates a very high level of satisfaction among the 42 employers who responded to this question.

### Employers Level of Satisfaction with Apprentices

Level of Satisfaction	Number of Organizations	Percent of Total
Excellent	14	33.4
Good	24	57.2
Poor	1	2.3
Uncertain	3	7.1
Sub-total	42	
Not Applicable	55	
No Response	50	
TOTAL	147	100.0

Given that 90.2% of respondents expressed either an Excellent or Good level of satisfaction with apprentices, it would appear that the apprentice-employer relationship remains the most promising means by which to transfer skills from one generation to the next.

As an addendum to this discussion on apprenticeships, it should be noted that as further layoffs and job losses materialize in the mining and manufacturing sectors, due to the recession, the difficulties of ensuring that sufficient journeypersons are available to supervise apprentices, based on current quotas, will likely result in challenges in finding placements for apprentices. Should this outcome materialize, it will be a major concern because it will lead to a significant deficiency of skilled trades people in the local labour force, as the economy recovers following the recession.

In response to inquiries concerning the use of interns in their organizations, only 46 of the 147 employers (31.3%) indicated that they engage interns. When asked about their levels of familiarity with intern programs, only 21.1% of the 118 employers who responded to this question indicated they were very familiar with the financial incentives that are available to engage interns, while another 24.5% said they were somewhat familiar with the incentives. Typical areas in which interns are engaged are information technology, administrative support and marketing. At the time of our survey, 27 employers reported that they employed a total of 55 interns. Just over half (15) had one intern, while the others ranged from 1 – 8 interns. Many of the issues about engaging interns were similar to those raised as concerns about engaging apprentices. Among them were concerns about a lack of essential skills (28), immaturity of young people (16), bureaucratic requirements (11), size of investment (10), and concerns about safety (7).

A majority (53.7%) of the employers indicated that they have co-op students in their organizations. Most of the co-op placements are high school students rather than college or university students, as the following table demonstrates. It is interesting to note that 84% (121 of 144) of employers who answered this question indicated that they are very familiar with the high school co-op program, while 57% said they were very familiar with the college co-op program. Only 41% indicated that they were very familiar with the university co-op program.

**Employers with the High School, College and University Co-Op Students**

Number of Co-Op Students	Organizations with High School Co-Ops.	Total High School Co-Op Students	Organizations with Comm. Coll. Co-Ops	Total Comm. Coll Co-Op Students	Organizations with University Co-Ops.	Total University Co-Op Students
0	103	0	122	0	134	0
1	24	24	14	14	4	4
2	10	20	7	14	4	8
3	4	12	1	3	2	6
4	1	4	1	4	0	0
5	2	10	1	5	1	5
6	1	6	1	6	1	6
7	1	7	0	0	0	0
8	0	0	0	0	0	0
9	0	0	0	0	0	0
10	0	0	0	0	0	0
11	0	0	0	0	0	0
12	1	12	0	0	0	0
13	0	0	0	0	1	13
TOTAL		95		46		42

For those who do not engage co-op students at the present time, the main changes that would encourage them to consider taking on co-op students were changes in safety regulations and better training in essential skills.

In light of the employer’s concerns about essential skills deficits among apprentices in the areas of “Finding Motivated People as Apprentices” (Highest ranked challenge) and “Lack of Emotional Maturity” (third-highest ranked challenge), and similar concerns expressed about interns and co-op students, it is interesting to note that in response to a question concerning the benefits of a program aimed at improving essential skills, 48.5% of respondents (70) indicated that their organization would benefit from such a program, while 39.6% said there would be no benefit. Only 11.6% were unsure.

Only 11% of employers indicated that they have offered incentive packages to encourage employees to retire over the past three years. Of the 16 employers that offered such packages, 11 were large organizations, while 5 were medium sized. No small employers offered retirement packages.

One quarter of employers indicated that they had strategies in place to encourage employees who plan to retire to continue contributing to the success of the business/organization after their retirement, while two thirds did not. Several were uncertain. Of the 38 who indicated having such strategies in place, 55% were large employers, while 34% were medium sized. Only 11% were small employers. The contributions that employers felt that retirees could make to the success of the organization included mentoring (80), contract services (80) and training (73).

Of the 141 organizations that provided responses on succession planning, a total of 63 (44.7%) indicated that they had formal succession plans in place, while 75 (53.2%) did not have such plans. Of these 63 employers

with formal succession plans in place, 47.6% were large organizations, while 41.3% were medium sized. Only 11.1% were small employers, which suggests that large and medium-sized organization are much better positioned to transition into the future, upon the retirement of its most experienced leaders. However, it remains a concern that only 63 of 141 (less than half) organizations are engaged in succession planning.

In line with frequently held perceptions, smaller organizations have less-developed human resource policies than medium and larger sized organizations. In light of the fact that a large majority of employers in the area are in the small category, based on indicator data from the Ministry of Training, Colleges and Universities, this is a matter that is worthy of further attention.

## Retirement-Based Job Demand

In order to determine the retirement patterns of workers in various sectors and occupations over the next twenty years, the Consultant assembled age data for 3-digit NOC occupations for the City of North Bay. From this data, it was possible to identify occupations that are expected to have a very high rate of attrition in the future by identifying those occupations where more than 60% of the workers are 40+ Years, meaning that the workforce of such an occupation tends to be more heavily weighted with older workers, who would be expected to retire over the next 20 years, creating job openings for younger workers.<sup>31</sup> The Occupational Categories where an aging population is expected to have the largest impact on replacement are the following:

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<sup>31</sup> This age was selected in recognition of the fact that the data that we are dealing with is 2006 data. Therefore, all occupational incumbents have aged by three years since the time when the data was collected. “The median age at retirement was about the same for both sexes until the mid-1990s. After that, the median age declined more for women than for men. In 2007, the median age of retirement was 61.4 for men and 60.6 for women.” Source: Statistics Canada <http://www.statcan.gc.ca/pub/71-222-x/2008001/sectionm/m-age-eng.htm>

For this reason, it is appropriate to assume that most people who were 40 years or more in 2006 will be retiring by 2029, based on these assumptions. Although this might seem a long time off to many people, it is important to remember the words of celebrated Canadian demographer David Foot when he said “Demography, the study of human populations, is the most powerful --- and most underutilized --- tool we have to understand the past and to foretell the future. ... Demographics explain about two-thirds of everything.” See David Foot, *Boom, Bust and Echo*, Macfarlane Walter & Ross, Toronto, Ontario, 1996, page 2.

**Projected Retirement Patterns for Various NOC Codes by Five-Year Cohorts  
2006 – 2031**

	TOTAL	% of all Occups.	Percentages in Various Age Categories							Number Retiring over next 20 Years
			Per Cent 40+	Per Cent 45+	Per Cent 50+	Per Cent 55+	Per Cent 60+	Per Cent 65+		
Senior Management Occupations	280	1.0	82.1	67.9	46.4	30.4	12.5	8.9	195	
Professional Occupations in Art and Culture	200	0.7	75.0	55.0	47.5	30.1	22.5	12.5	105	
Professional Occupations in Business and Finance	500	1.7	70.0	55.0	39.0	29.0	15.0	6.0	275	
Skilled Administrative and Business Occupations	1415	4.8	67.8	53.4	37.5	25.1	13.4	5.7	770	
Processing & Mnfg. Machine Operators & Assemblers	465	1.6	66.7	52.7	32.3	14.0	4.3	2.2	290	
Professional Occupations in Health Care	1060	3.6	66.5	52.8	42.0	30.2	13.2	6.1	565	
Technical & Skilled Occupations in Healthcare	395	1.3	64.6	40.5	30.4	16.5	10.1	2.5	215	
Middle & Other Management Occupations	2445	8.3	62.8	47.6	30.1	18.4	5.9	2.0	1391	
TOTAL	6,760	23.4							3,806	

Source: Statistics Canada Custom Data, 2006

In interpreting this data, assuming a retirement age of 60 years, the data indicate that 82.1% (230 individuals) out of 280 people in Senior Management Occupations will retire from the labour force over the next 20 years, while 67.9% (or 190 individuals) will be exiting within the next 15 years. Keeping the age at retirement assumption constant, we see that 130 individuals will retire within the next ten years, while 85 individuals will retire within the next five years. As the Per Cent 60 + column suggests, a modest number of workers (12.5%, representing 35 workers) remain in this occupation beyond the age of 60 and even fewer (8.9% or 25 workers) stay on beyond the age of 65 years. The data support the claim that the great majority of workers in the foregoing occupations exit the profession between the ages of 40 and 60. This analysis can be carried out for each of the other occupations listed in the table to provide a sense of the short, medium and longer-term replacement requirements associated with retirement-based job creation.

Clearly, some of the occupations contained in the foregoing table are heavily weighted with older individuals because, by virtue of the experience accumulated throughout a career, individuals are rewarded with management positions, which achieves two objectives: Securing a senior management job rewards the worker with a higher-paying, high-status position, by recognizing the number of years of experience and that worker’s contribution to the company. The second objective is to ensure that the business benefits optimally by ensuring that the most senior positions are filled by individuals who, by virtue of their experience and years of service, will lead the business responsibly. Thus, it is not surprising that some of the senior management high-status occupations in the foregoing table have a high concentration of older individuals. One might expect to find more older individuals occupying high-status management positions, where a combination of seniority, ability and experience serve as the main criteria to access such occupations.

Interestingly, Senior Management Occupations, in line with research that has been conducted on high-status occupations, tend to have a higher percentage of workers (as compared to other jobs), who continue working in the occupation after they have surpassed the average age of retirement, primarily because they find their work more rewarding than workers in other occupations. Thus, it is more than coincidence that the occupations in the foregoing table that contain the highest values in the far right (65 Years +) column are those occupations that could be interpreted as “high-status.” Such occupations include (in descending order of magnitude of the percentage in the 65+ age category): Professional Occupations in Art and Culture

(12.5%), Senior Management Occupations (8.9%), Professional Occupations in Health Care (6.1%), and Professional Occupations in Business and Finance (6.0%). In comparison, most of the remaining occupations, including Processing & Manufacturing Machine Operators & Assemblers, Technical & Skilled Occupations in Healthcare, Middle & Other Management Occupation tend to have very few workers employed beyond the age of 65 years (with values in the region of 2.0 - 2.5%).

Perhaps more germane to the study at hand are occupations that are not necessarily “senior management”, “high-status” occupations, but where a significant percentage of the workforce is contained in the 40+ age category. Processing & Manufacturing Machine Operators & Assemblers, Skilled Administrative and Business Occupations, Technical & Skilled Occupations in Healthcare, and Middle & Other Management Occupations, therefore lead the pack, with respect to those that are anticipated to be impacted by the wave of baby boom retirements that will begin in 2010 and last until approximately 2030.

The table below, identifies those occupations which are anticipated to be less affected by retirements over the next 20 years:

**Occupations in which Fewer than 60% of Incumbents  
are Projected to Retire in the next 20 Years  
City of North Bay**

	TOTAL	% of all Occups.	% 40+
Intermediate Occupations in Transport, Equipment Operation, Installation and Maintenance	1440	4.9	57.7
Trades and Skilled Transport and Equipment Operators	2340	8.0	56.8
Professional Occupations in Social Science, Education, Government Services and Religion	2115	7.2	56.5
Technical Occupations Related to Natural and Applied Sciences	835	2.8	55.1
Professional Occupations in Natural and Applied Sciences	515	1.8	54.5
Processing, Manufacturing and Utilities Supervisors and Skilled Operators	115	0.4	52.2
Intermediate Occupations in Primary Industry	50	0.2	50.0
Skilled Sales and Service Occupations	1705	5.8	47.2
Assisting Occupations in Support of Health Services	475	1.6	46.3
Clerical Occupations	3295	11.2	44.0
Skilled Occupations in Primary Industry	110	0.4	40.9
Intermediate Sales and Service Occupations	3560	12.1	39.2
Technical and Skilled Occupations in Art, Culture, Recreation and Sport	405	1.4	38.3
Paraprofessional Occupations in Law, Social Services, Education and Religion	885	3.0	36.7
Elemental Sales and Service Occupations	3865	13.1	36.2
Trades Helpers, Construction Labourers and Related Occupations	375	1.3	30.7
TOTAL	22085	76.6	

Source: Statistics Canada Custom Data, 2006

In order to obtain a more in depth appreciation of specific positions in which large percentages of the North Bay labour force are projected to retire over the next 20 years, four-digit NOC data was analyzed. This allowed the researcher to provide the following information which highlights specific areas of concern that will require attention in order to avoid shortages of labour resulting from retirement attrition, to fill specific positions.

In looking at the occupations with more than 25 occupants in 2006, where more than 80% are over the age of 40 years, we note the following:<sup>32</sup>

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<sup>32</sup> Since this analysis is based on a 20% sample conducted by Statistics Canada during the 2006 Census of Canada, a decision was made to focus on occupations with higher (25 + employees) numbers of employees to avoid confusion created by rounding when smaller numbers are involved. However, in Appendix B, all occupations in which more than 80% of people will retire within the next 20 years are provided. However, caution should be used in interpreting this data due to potential issues associated with rounding when using small numbers.

**Occupations with more than 25 Incumbents  
in which More than 80% of All Workers are 40+ Years  
City of North Bay<sup>33</sup>**

Occupational Category	Number	% 40+	%45+	%50+	%55+	%60+
Specialist Physicians	80	100	93.8	81.3	37.5	25
Railway Carmen	70	100	78.6	35.7	14.3	14.3
Senior Managers – Goods Production, Utilities, Trans. And Constr.	65	100	76.9	53.8	38.5	23.1
Banking, credit and other Investment Managers	45	100	77.8	22.2	0	0
Plastics Processing Machine Operators	35	100	57.1	28.6	28.6	0
Medical Radiation Technologists	35	100	85.7	57.1	28.6	28.6
Authors & Writers	35	100	100	100	71.4	42.9
Butchers, Meatcutters & Fishmongers, Retail and Wholesale	30	100	66.7	66.7	66.7	33
Computer Engineers (Except Software Engineers)	25	100	80	40	40	40
Musicians and Singers	25	100	80	80	40	0
Human Resource Managers	60	91.7	75	41.7	16.7	0
School Principals & Administrators of Elementary & Secondary Schools	105	90.5	61.9	38.1	23.8	0
Technical Sales Specialists, Wholesale Trade	50	90	70	70	70	50
Retail and Wholesale Buyers	50	90	90	90	40	40
Contractors and Supervisors, Oth. Constr. Trades Installers, Repairers	50	90	60	40	20	0
Senior Managers – Financial, Communications & Other Bus. Services	50	90	70	20	0	0
Senior Managers – Trade, Broadcasting and Other Services, n.e.c.	45	88.9	66.7	66.7	44.4	22.2
Facility Operation and Maintenance Managers	45	88.9	66.7	22.2	0	0
Construction Inspectors	45	88.9	22.2	0	0	0
Education Policy Researchers, Consultants & Program Officers	45	88.9	66.7	44.4	44.4	22.2
Bricklayers	40	87.5	87.5	50	25	0
Bus Drivers	190	86.8	71.1	55.3	34.2	7.9
Letter Carriers	70	85.7	64.3	50	35.7	0
Public Works Maintenance Equipment Operators	35	85.7	57.1	28.6	28.6	0
Specialists in Human Resources	35	85.7	57.1	57.1	28.6	0
Stationary Engineers and Auxiliary Equipment Operators	35	85.7	57.1	57.1	57.1	57.1
Transportation Managers	65	84.6	61.5	46.2	30.8	15.4
Medical Laboratory Technologists and Pathologists Assistants	65	84.6	46.2	30.8	15.4	0
Real Estate Agents and Salespersons	60	83.3	66.7	50	16.7	16.7
Assessors, Valuers and Appraisers	30	83.3	83.3	83.3	50	50
Dentists	30	83.3	83.3	83.3	83.3	33.3
Tailors, Dressmakers, Furriers and Milliners	30	83.3	83.3	83.3	50	0
Property Administrators	145	82.8	62.1	62.1	37.9	24.1
Lawyers and Quebec Notaries	85	82.4	64.7	64.7	52.9	11.8
Administrators, Post-Secondary Education and Vocational Training	55	81.8	54.5	18.2	18.2	0
Professional Occupations in Public Relations and Communications	55	81.8	36.4	36.4	18.2	18.2
Construction Millwrights & Industrial Mechanics (except textile)	80	81.3	37.5	25	12.5	0
Senior Managers – Health, Education, Social & Comm. Services	80	81.3	68.8	50	37.5	0
Bookkeepers	180	80.6	63.9	50	41.7	22.2
Woodworking and Machine Operators	25	100.0	100.0	40.0	40.0	0.0
Supervisors, Petroleum, Gas & Chemical Processing & Utilities	25	100.0	80.0	40.0	0.0	0.0
Painters, Sculptors & Other Visual Artists	25	80.0	40.0	40.0	40.0	40.0
Purchasing Managers	25	80.0	80.0	80.0	40.0	0.0
Electrical Power Line and Cable Workers	25	80.0	80.0	80.0	40.0	0.0
Weavers, Knitters, and Other Fabric-Making Occupations	25	80.0	80.0	80.0	40.0	0.0
Managers in Art, Culture, Recreation and Sport	25	80.0	80.0	40.0	40.0	0.0
Psychologists	25	80.0	80.0	80.0	0.0	0.0
Chemical Plant Machine Operators	25	80.0	80.0	80.0	0.0	0.0
Pursers and Flight Attendants	25	80.0	0.0	0.0	0.0	0.0
TOTAL	2,605					

Source: Statistics Canada Custom Data, 2006

<sup>33</sup> Occupations estimated to contain fewer than 25 individuals in total are not included in this table, due to vulnerabilities inherent with the 20% Statistics Canada Census methodology.

All told, these occupations employed 2,605 people, representing 8.9% of the total labour force in the City of North Bay. As discussed above, senior management and higher-status occupations would be expected to contain a significant number of older individuals. Nevertheless, these individuals will also need to be replaced as they retire in the coming two decades. But perhaps a greater focus should be placed on jobs within this table other than senior management positions, to gain a sense of which positions are most vulnerable to a mass wave of retirements occurring over a relatively short period of time.

A review of the table provides an indication of major areas of concern resulting from the anticipated retirement of the baby boom generation over the next 20 years. For example, based on the assumption that the average person in the labour force retires at the age of 60 years, it is anticipated that 86.8% of the 190 bus drivers in the City of North Bay will retire within the next twenty years. Similarly, 80.6% of the 180 bookkeepers in the city are projected to exit the labour force over this same time period. By looking at the percentage of people who are 45+ for each occupational category, it is possible to estimate the number of people who will leave the labour force within the next 15 years. This pattern may be followed to look at those who will leave within the next ten years and the next five years.

In looking at the occupations where high percentages (more than 20%) are projected to leave the labour force within the next five years the following table pinpoints areas that are deserving of special attention, to ensure that proper measures are taken to replace people whose departures from the labour force are imminent. Given that three years have passed since this data was collected for the Census, it is reasonable to conclude that shortages and/or little slack within some of these occupations are either imminent or occurring within the labour market as at the time of publication, March, 2009.<sup>34</sup>

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<sup>34</sup> In Appendix B, a table is provided identifying the retirement-based demand by NOC code for all occupations in North Bay over the next five, ten, fifteen and twenty year period for all positions with 25 or more employees. The table demonstrates that a total of 12,280 of the 29,400 people currently in the North Bay labour force (43.5%) are projected to exit the North Bay labour force over the next twenty years. Smaller percentages are projected to retire over the next five years (8.1%), ten years (18.4%), and fifteen years (31.0%).

**Occupations with more than 25 Incumbents in which  
More than 20% are Projected to Leave the Labour Force within Five Years  
North Bay**

Occupation	Total Labour Force	% 55+
Stationary Engineers and Auxiliary Equipment Operators	35	57.1
Technical Sales Specialists, Wholesale Trade	50	50.0
Assessors, Valuers and Appraisers	30	50.0
Authors & Writers	35	42.9
Retail and Wholesale Buyers	50	40.0
Computer Engineers (Except Software Engineers)	25	40.0
Painters, Sculptors & Other Visual Artists	25	40.0
Dentists	30	33.3
Butchers, Meat Cutters & Fishmongers, Retail and Wholesale	30	33.0
Medical Radiation Technologists	35	28.6
Specialist Physicians	80	25.0
Property Administrators	145	24.1
Senior Managers – Goods Production, Utilities, Trans. and Constr.	65	23.1
Bookkeepers	180	22.2
Senior Managers – Trade, Broadcasting and Other Services, n.e.c.	45	22.2

Source: Statistics Canada Custom Data, 2006

It should be emphasised that the data presented above covers only positions with 25 or more incumbents, based on the 2006 Census of Canada. As the data in Appendix B demonstrate, there are many more positions with fewer than 25 incumbents where more than 80% are projected to retire in the next 20 years, based on the assumptions discussed above. Detailed data on all occupations is included in Appendix B to provide interested readers with an opportunity to obtain attrition data on any occupation by NOC code, based on 2006 Census of Canada Data.

From the perspective of job seekers there will be a significant amount of opportunity for advancement and employment in the local economy as a result of attrition due to the aging and retirement of the baby boom generation over the next 20 years. However, from the perspective of employers and those whose primary interest it is to train and develop the future labour force, attention should be paid to means of ensuring that the right number of highly trained people are available to fill the positions in the local labour force to accommodate both replacement and expansion needs over the next two decades. To obtain a more detailed appreciation of specific needs, the following discussion focuses on occupations in various areas where a range of factors are projected to create the highest levels of demand.

Detailed Statistics Canada results of retirement-based demand by NOC code for all occupations are presented in Appendix B. The results were as follows:

- Within the next five years, a total of 2,385 jobs (8.1%) are projected to be available in the North Bay labour force, due to retirement;
- Within the next ten years, a total of 5,420 jobs (18.4%) are projected to be available in the North Bay labour force, due to retirement;
- Within the next fifteen years, a total of 9,120 jobs (31.0%) are projected to be available in the North Bay labour force, due to retirement;

- Within the next twenty years, a total of 12,780 jobs (43.5%) are projected to be available in the North Bay labour force, due to retirement.

## **Projected High Demand Areas- City of North Bay**

Based on a variety of sources, including Statistics Canada data from the 2006 Census of Canada, Statistics Canada custom data on high-demand occupations, based on projected retirement patterns, the Competitive Analysis conducted by the Ontario Ministry of Agriculture, Food and Rural Affairs, interviews with North Bay area employers during the summer of 2008, and research from a variety of sources, including newspapers, the following have been identified as the areas where the best opportunities will exist for employment over the next five to ten years.

- Health Care Occupations
  - Nurses
  - Specialist Physicians
  - General Practitioners
  - Registered Nursing Assistants
  - Dentists
  - Medical Radiation Technologists
  - Nurses Aides/Orderlies
  - Medical Laboratory Technicians
- Long Term Care Occupations
  - Nurses
  - Registered Nursing Assistants
  - Personal Support Workers
- Mental Health Occupations
  - Social Workers
  - Counsellors
  - Nurses
- Management Occupations
  - Senior Management Occupations
  - Middle Management Occupations
  - Human Resource Occupations
- Social Service Occupations
  - Child Care Workers
  - Social Workers
- Professional and Technical Services Occupations
  - Accountants
  - Lawyers
  - Engineers
  - Architects
- Municipal Government Occupations
  - Upper Level Managers

- Middle Level Managers
- Planners
- Engineers
- Social Service Workers
- Transportation Occupations
  - Drivers
  - Support Staff
- Information and Communication Technology Occupations
  - Computer technicians
  - Computer Programmers
- Trades Occupations
  - Plumbers
  - Electricians
  - Welders
  - Mechanics
  - Machining Tools Operators
  - Machinists
  - Other Trades Helpers and Labourers
  - Machine Fitters
  - Auto Service Technicians
- Aviation and Aeronautical Services Occupations
  - Aviation Mechanics
  - Aviation Technicians
  - Pilots
  - Painters
- Occupations in Business and Finance
  - Financial Advisors
  - Accountants
  - Auditors
  - Bookkeepers
  - Assessors, Valuers and Appraisers
- Retail Trades Occupations
  - Retail Sales Persons
  - Other Elemental Sales Occupations
  - Food Counter Attendants
  - Retail Managers
  - Restaurant/Food Service Managers
- Others
  - Admin Clerks
  - Light Duty Cleaners

By combining current demand (1,522 positions), five year expansion-based demand (2,301 positions) and retirement-based demand for the five year period (2,385 positions), it is appropriate to conclude that a

total of 6,208 positions (21.1% of the existing 29,400 jobs) will be required to replace both those who retire and to fill the projected expansion positions identified by employers over the next five years during the local survey.<sup>35</sup>

## Competitive Advantage Analysis<sup>36</sup>

Competitive Advantage Analysis was designed by the Ontario Ministry of Agriculture, Food and Rural Affairs to provide an intuitive tool that facilitates the analysis of the structure and performance of the economies of communities throughout Ontario. It provides an effective means of identifying strengths and weaknesses of the local economy, by comparing growth of various sectors from 2001 – 2006. Then it assesses the performance of the local economy in comparison with the Ontario economy as a whole.

The data that is used for the analysis comes from the 20% sample data collected by Statistics Canada on the long form of the census, but only people who were employed at the time of the census are used in the competitive advantage analysis.

Industries in the analysis are classified according to the North American Industrial Classification System (NAICS). Both place of work data and place of residence data are reflected in the competitive advantage analysis.

To generate the Locational Quotient for each NAICS sector, the percentage gain/loss for both Ontario and the local community is calculated. Then the percentage growth for each local sector is divided by the percentage growth for the Province of Ontario. The resulting figure is referred to as the Locational Quotient. The following guideline provides an indication of the interpretation that may be placed on various values:

- LQs <0.75 (low) indicate that local needs are not being met by the sector and the municipality is importing goods and services in that sector.
- LQs between 0.75 and 1.25 (medium) indicate that the community is self-sufficient in that sector. LQs of 1.0 result if local percentage of employment growth is equal to the provincial percentage of employment growth in the sector.
- LQs >1.25 (high) indicate that the sector is serving needs that extend beyond the boundaries of the municipality. The sector is likely exporting goods and services to other areas.
- LQs of 5 and over are very high and suggest a high level of local dependence on the sector.

To conduct an effective interpretation, it is important to calculate Locational Quotients for both the Major Group/Sector (2 digit NAICS code) and specific industries (3 – 4 digit NAICS codes) to determine whether sectors are leading or lagging.

By conducting a variety of other statistical manipulations on the data, Competitive Advantage Analysis is capable of generating a number of other statistical summary measures that result in the calculation of a Carvalho Classification, which allow the reader to determine whether various sectors are driving forces in the local economy or whether they are marginal. Within the scale there are twelve points. Among the

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<sup>35</sup> See Appendix B for a detailed breakdown, by NOC code.

<sup>36</sup> See Competitive Advantage Analysis: A tool to understand the relative size and performance of business sectors. [www.omafra.on.ca](http://www.omafra.on.ca)

classifications, in descending order, are Driving, Accelerating, Rising, Evolving, Transitional, Moderate Promising, Yielding, Modest, Challenging, Vulnerable and Marginal.

Finally, using all of the above, each sector is assigned an Industry Targeting Classification. This allows the reader to get an idea of the prospects that have been targeted for each sector. Eight Industry Targeting Classifications are identified, as follows:

- Current strength
- Emerging strength
- Prospects Limited by external trends
- Prospects limited by weak base and external trends
- High priority retention target
- Prospects limited by weak base and declining competitiveness
- Prospects limited by external trends and declining competitiveness
- Prospects limited overall
- No basis for evaluation

In reviewing the following table, it is clear that six areas have been classified as Current Strengths in the North Bay labour force, based on the Competitive Advantage Analysis methodology. They are as follows:

- Accommodation and Food Services
- Transportation and Warehousing
- Administrative/Waste Management/Remediation Services
- Other Services (Except Public Administration)
- Real Estate and Rental and Leasing
- Mining and Oil and Gas Extraction

In each of the above sectors, employment growth in North Bay over the period from 2001 – 2006 was higher than employment growth for the Province of Ontario, although it should be emphasized that we have reanalyzed the sectors to place the ones with the highest number of employees in 2006 at the top of the list.

**North Bay Competitive Advantage Analysis 2001 – 2006 NAICS**

Sectors (NAICS)	Industry Targeting	Emp. Growth Ontario	# jobs '01 North Bay	# jobs '06 North Bay	% of total Labour Force	Emp. Growth North Bay	Actual Change (# jobs) North Bay
All industries		6.06%	26,080	27,910	100	7.02%	1,830
72 Accommodation and food services	Current Strength	6.55%	2,015	2,150	7.7	6.70%	135
48-49 Transportation and warehousing	Current Strength	5.96%	1,595	1,795	6.4	12.54%	200
56 Administrative/Waste Mgmt/Remediation Services	Current Strength	19.22%	910	1,400	5.0	53.85%	490
81 Other services (except public administration)	Current Strength	9.18%	1,210	1,395	5.0	15.29%	185
53 Real estate and rental and leasing	Current Strength	14.51%	440	550	2.0	25.00%	110
21 Mining and oil and gas extraction	Current Strength	18.05%	215	365	1.3	69.77%	150
54 Professional, scientific and technical services	Emerging Strength	8.97%	1,135	1,340	4.8	18.06%	205
41 Wholesale trade	Emerging Strength	9.08%	685	910	3.3	32.85%	225
31-33 Manufacturing	Prospects limited by weak base and external trends	-9.15%	1,870	1,820	6.5	-2.67%	-50
51 Information and cultural industries	Prospects limited by weak base and external trends	-0.43%	545	560	2.0	2.75%	15
44-45 Retail trade	High priority retention target	5.62%	4,255	4,270	15.3	0.35%	15
62 Health care and social assistance	High priority retention target	14.57%	3,690	4,175	15.0	13.14%	485
91 Public administration	High priority retention target	13.39%	2,635	2,565	9.2	-2.66%	-70
61 Educational services	High priority retention target	13.95%	2,420	2,520	9.0	4.13%	100
23 Construction	High priority retention target	8.15%	755	685	2.5	-9.27%	-70
22 Utilities	High priority retention target	4.60%	295	245	0.9	-16.95%	-50
52 Finance and insurance	Prospects limited due to weak base and declining competitiveness	7.62%	975	780	2.8	-20.00%	-195
71 Arts, entertainment and recreation	Prospects limited due to weak base and declining competitiveness	13.60%	320	335	1.2	4.69%	15
55 Management of companies and enterprises	Prospects limited due to weak base and declining competitiveness	2.53%	40	20	0.1	-50.00%	-20
11 Agriculture, forestry, fishing and hunting	Prospects limited overall	-9.18%	85	35	0.1	-58.82%	-50

Source: Ontario Ministry of Agriculture, Food and Rural Affairs

In a more detailed analysis, that is included in Appendix E, sub sectors within each of these sectors are identified to provide more specific direction on the areas of strength and weakness within the local economy.

This process is repeated for each of the remaining 14 NAICS sectors, thereby allowing the reader to get a clear and comprehensive snapshot of the performance of the local economy and identify areas that offer prospects for attention in the future.

Other sectors, in declining order of significance to the local economy, based on a combination of Industry Targeting and size of the local employment base are the following:

- Professional, Scientific and Technical Services
- Wholesale Trade
- Manufacturing
- Information and Cultural Industries
- Retail Trade
- Health Care and Social Assistance
- Public Administration
- Educational Services
- Construction
- Utilities
- Finance and Insurance
- Arts, Entertainment and Recreation
- Management of Companies and Enterprises
- Agriculture, Forestry, Fishing and Hunting

While the results of Competitive Advantage Analysis are very instructive, it should be emphasised that in at least one case a note of caution is advised. In looking at the Health Care and Social Assistance Sector, it is clear that the local sector grew at a slightly lower rate (13.14%) than the Province of Ontario (14.57%) between 2001 and 2006, resulting in a high Locational Quotient (1.47) but a lagging classification for the local Health Care and Social Assistance Sector. However, this is a very large sector that accounted for 4,175 jobs in the local economy in 2006 and based on local knowledge gained from various sources, it has been possible to confirm that this sector is a candidate for significant growth over the next five to ten years in the local setting. For this reason, it is important to understand that every sector should be subjected to scrutiny, based on local knowledge and conditions to ensure that there is no distortion in the manner in which prospects for the local economy are understood.<sup>37</sup>

To round out this discussion, it is important to identify the assets and amenities that should be considered as strong forces in contributing to the success of the local economy over the next five to ten years:

- The North Bay General Hospital
- The Northeast Mental Health Centre

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<sup>37</sup> Indeed OMAFRA suggests that “it is important to consider the nature of each sector before drawing any conclusions from this analysis. Remember that this analysis is based on employment growth as an indicator of sector performance. Other criteria, which may be equally significant, are not part of this particular analysis.

- The Air Base Properties Assets and Infrastructure
- The North Bay Jack Garland Airport
- Nipissing University
- Canadore College
- Intersecting Transcontinental and Trans Provincial Highway System
- Intersecting Transcontinental and Trans Provincial Railway Systems
- Trout Lake and Lake Nipissing
- The Lake Nipissing Waterfront Park
- The North Bay Capitol Centre
- Proximity to High Value Mining Properties

## High School Consultations

As a component of this project, the consultant was asked to meet with high school students to determine the methods that they are using to make career choices, and more specifically, the ways they get their information prior to making a decision. This section will report on our meetings with students and also on our meeting with the Widdifield Parents' Council to get their reaction to the strategy that is proposed in the following section, related to methods of informing young people regarding the various job opportunities that will exist in North Bay over the next decade or two.

Over the course of a three month period, from October 2008 to December 2008, the consultant met with more than 100 high school students from the following schools:

- Algonquin Secondary School
- Widdifield Secondary School
- St Joseph Scollard Hall
- West Ferris Secondary School
- Nbisiiing Secondary School
- Chippewa Secondary School
- École publique Odyssée

Each meeting saw approximately 15 students from each school participate. The meetings were designed to capture information that would assist the consultant to make recommendations concerning the most appropriate methods of communicating the results of the study to students.

The common themes that resulted from our meetings with students are presented below.

- Have a variety of people representing various occupational and professional opportunities visit the high schools --- circuit. Use data from the LMI Study to identify the occupations and trades that are projected to be in highest demand in the near future.
- Expand Explore the Trades to include other occupations and professions. Offer the program at times that are convenient to attract both students and parents.
- Develop web site/CD-Rom
- Develop functional marketing piece that will be valued by students.

- Work through guidance/career counsellors to educate them on the issues and opportunities
- Involve students in opportunities for co-op placements. Work with business to expand the range of co-op opportunities.

During our meeting with the Widdifield Parents' Council we presented the product development concept, which is described below. The concept was received very well and was generally regarded as an effective strategy to disseminate the information resulting from this report.

## Product Development

The summary below provides an indication of the types of marketing activity that might best appeal to all stakeholders identified above, based on the feedback we received from these groups.

During our consultations with students throughout the area, repeated reference was made to the fact that students wanted to hear directly from various individuals involved in a range of occupations, in order to determine their level of interest in pursuing any given occupation.

These sentiments led the consultant to identify a high school guest speaker circuit as an effective means of meeting the needs of students in the area, with respect to their career research/selection process.

This scenario could see community partners, such as the North Bay and District Chamber of Commerce and the school boards in the area, spearheading the initiative, since the Chamber has ready access to almost 900 businesses in the area and the school boards could effectively coordinate the circuit.

Essentially, the Chamber would identify a selection of approximately 10-12 individuals, from a range of occupations, which were identified in the LMI study as being in high demand in the next 5 years. A circuit schedule would then be booked with the high schools in the area, so that each month, each high school would be introduced to 1 or 2 new occupations via an in-person presentation, followed by a Q & A session.

Our expectation is that many of the students in attendance at these presentations may not be fully aware of the opportunities available in the area for a given occupation. This strategy would introduce them to the possibilities that exist, assuming that they pursue advanced training in the field of their choice.

Complementary to the strategy discussed above, it was also evident that students wanted to receive information *via* a format that was familiar and comfortable to them. This, of course, would be most effectively addressed by utilizing information technology to reach this group.

At a meeting held by the LMI steering committee, a CD-Rom was presented to the group, showcasing a full range of occupations, including the opportunities that exist for those holding various degrees, diplomas and certificates. While this presentation was deemed to be impressive by the group in attendance, it was felt that more could be done to enhance the effectiveness of this type of marketing strategy.

By incorporating video footage of various people representing some of the high demand jobs in North Bay, the **CD presentation** would come alive and relate more effectively with students, parents and teachers.

The videos would obviously complement a full range of additional information contained in the CD, such as level of education required for any given occupation, links to Canadore College and Nipissing University,

average wages for occupations, various options available to students with a given degree, diploma or certificate, etc.

Teachers could also use the CD for in-class presentations to students, since most of the schools we visited offered “Career” courses. In addition, it could be distributed to students at the beginning of the year in an orientation package, so that parents would have the opportunity to view and obtain information on the occupations in high demand, thereby allowing them to work with their children to identify a career choice early.

In an effort to determine if some of the current initiatives of the LMG were effective in addressing the needs of students in the area, attendees at the student consultations were asked to provide an assessment of the Explore the Trades event, which is held each year at Memorial Gardens to promote the trades.

In almost all cases, students felt this was a great initiative which allowed them to meet and speak with various trades’ professionals to gain a better understanding of entry criteria, training requirements and dynamics associated with each occupation. However, students frequently commented that they would have liked the opportunity to visit with other individuals in occupations other than the skilled trades.

Since the Explore the Trades event is well established, it might be appropriate to investigate expanding the range of occupations represented to include other occupations & professions, which would make the event appeal to a broader cross-section of the student population.

The strategies identified above are generally believed to be those that will meet the needs of those individuals that the consultant met with throughout the duration of the project. In our view, by implementing these initiatives, students, parents and teachers will be better equipped to make informed decisions on an educational path that will lead to a fulfilling career and create a stronger economy in the City of North Bay.

## Summary

Based on the results of the study, it is clear that the North Bay economy is evolving from an industrial to a service-based economy at a much faster rate than the economy of the Province of Ontario, leading to a necessity to adjust local training requirements to prepare people for positions in the new knowledge-based economy.

While the study was in progress, the recession that started in October, 2008 led to a necessity to make adjustments, aimed at incorporating the significance of its impacts on the local economy. The summary of Significant Employment Changes in the North Bay area that is presented in Appendix C identifies the erosion of employment that has occurred over a five – six month period. As well, it is important to note that because the interviews with local employers were conducted during the summer of 2008, it is possible that many of their optimistic expansion projections over the next two to five years might be adversely affected.

In order to provide a sense of what needs to be done to address some of the findings of the study, we have presented a series of items requiring attention below:

- Only five of the respondents indicated that they had more than 15 apprentices in their employ, but collectively they employ a total of 55% of the 156 apprentices. This suggests a high level of dependency on a few large employers, especially in light of the fact that all but one of them indicated that they did not expect to have more than 15 apprentices in the next two to five years.
- Only 20.4% of respondents indicated that they were “Very Familiar” with financial incentives that were available to those who engage apprentices, suggesting a need for more promotion of these programs to encourage employers to engage apprentices.
- The fact that a large number of people who have been laid off due to the recession over the past six months have been in the manufacturing sector leads to the possibility that both current and future apprenticeship placements will be affected, leading to concerns about the availability of journeypersons, as the local economy recovers from the recession.
- In line with projected demand for people to fill various positions due to both expansion and retirement in the future, it will be critical for educational institutions in the region to focus upon training people in NOC Code categories that are uniquely relevant to programs which they are capable of offering.
- As discussed earlier in the report, it is essential that all sectors within the community recognize the critical role that both natural and built assets and amenities play in contributing to the economic vitality of the City of North Bay. For this reason, the importance of supporting and strengthening these assets and amenities is of utmost importance.
- Florida and Martin indicate that it will be necessary to invest more fully in the development of skills that are necessary to adjust to the fact that “the shift we are seeing now is based fundamentally on human intelligence, knowledge, and collaborative skills.” Indeed, they feel that it will be necessary to increase post-secondary education attendance rates among 18-24 year olds from 40% in 2007 to 60% in the future, if educational requirements for future jobs are to be met. The authors report that, based on current momentum, this figure is only expected to reach a maximum of 50% over the next 20 years. Therefore, it will be important to find ways to close the gap.

- Florida and Martin suggest that it will be necessary to apply more resources to ensure that children acquire the requisite skills for the new economic era from the earliest ages, since the early years are the formative years.
- The long-term trend exhibits an aging over time and this is expected to continue, given the preponderance in the population of those born between 1946 and 1966, along with current fertility rates in Ontario that are at or near historical lows.
- Reductions in the “Apprenticeship, etc.” category were observed, to some degree, in every community, which reinforces the need to continue marketing efforts that encourage youth to pursue trades certifications. In so doing, North Bay may be successful in stemming the tide towards a retreat from a group of occupations that have historically offered highly attractive compensation packages.
- North Bay must provide better occupational opportunities to retain its post-secondary graduates. Otherwise, their skills and energies will be lost to the community.
- Once again, North Bay leads all benchmarks in the percentage of children living in low income, although the differences between North Bay and Sault Ste. Marie and Ontario are marginal. Nevertheless, the fact that 14.3% of children under the age of 18 years in North Bay live in a low income category (after tax) is of considerable concern because such circumstances early in life are apt to have a portending effect on future educational and occupational mobility.
- Approximately 70% of all immigrants have at least some post-secondary education upon arrival in Canada. In fact, the Census is unequivocal with regard to the high levels of education characteristic of current, first-generation immigrant populations in Canada. This trend is driven primarily by the immigration criteria established by the federal government, which places a very high premium on university education in its assessment of successful immigration applications. The low premium which employers in the study place on high levels of education among immigrants either means that employers place little value on this characteristic, or it suggests that employers are perhaps unaware that immigrants possess such high levels of educational credentials. Another possibility could be related to the difficulty of evaluating foreign credentials, that is cited below by 42 respondents. This finding suggests that organizations whose mission it is to assist immigrants integrate into their chosen community may wish to explore the merits of promoting such high levels of credentialization to prospective employers, in their efforts to assist immigrants to secure employment that fully optimizes immigrants’ high educational attainment.
- The high rates of response for “Language Barriers” is surprising, given the high rates of education that are characteristic among immigrant populations, meaning that the immigrant workers are more likely today than ever to speak, read and write English upon their arrival in Canada. The findings for “Language Barriers” again suggest a time lag, and hearken back to a time when immigrants were, for the most part, poorly educated and unable to speak English. There may also exist a gap between the perceptions of respondents and actuality. Again, this suggests a marketing opportunity for local immigrant organizations, who could promote high educational levels and language skills to prospective employers.
- The LMI Survey revealed that only 31 respondents of the 43 (who indicated they had engaged apprentices) had taken advantage of the Ontario Ministry of Training, Colleges and Universities apprenticeship incentive programs. Since a total of 70 respondents employ licensed tradespeople, the number of organizations that engage apprentices (at 43) seems relatively low.

- Most of the respondents indicated that they employ fewer than five apprentices. Only five organizations had more than 15 apprentices, suggesting a need to promote the program even more aggressively.
- However, employers did not express as much familiarity as one might expect with the financial incentives provided by the Ministry of Training, Colleges and Universities, that encourage employers to engage apprentices, suggesting a need for more promotion.
- Five large employers currently employ 86 of 156 apprentices (55.1%). The concern here relates to the fact that the apprenticeship system in North Bay appears to be heavily dependent on a very small number of rather large employers. If for any reason these large employers were to reduce the number of apprentices in their employ, or were to cease altogether taking on apprentices, North Bay's apprenticeship prospects would decline considerably. Given the critical significance of these large employers in making apprenticeship work in North Bay, it is absolutely essential that apprenticeship proponents delve more deeply into understanding apprenticeship within the context of a large organization, to see if there are lessons that can be learned to help other employers avail themselves of the benefits of apprenticeship, but also to gain a better sense of prospects of apprenticeship, as seen through the eyes of employers who play such a pivotal role in making this skills-transfer system successful.
- A declining number of employers intend to hire apprentices in the next two and five-year periods. Given the pivotal role that apprenticeship has played historically, as a means by which important process and knowledge skills are relayed from one generation to the next – it is absolutely crucial that various stakeholders communicate to determine the optimal means by which apprenticeship can be made to work for the 21st century.
- In light of the employer's concerns about essential skills deficits among apprentices in the areas of "Finding Motivated People as Apprentices" (Highest ranked challenge) and "Lack of Emotional Maturity" (third-highest ranked challenge), and similar concerns expressed about interns and co-op students, it is interesting to note that in response to a question concerning the benefits of a program aimed at improving essential skills, 48.5% of respondents (70) indicated that their organization would benefit from such a program, while 39.6% said there would be no benefit. Only 11.6% were unsure.
- Of the 141 organizations that provided responses on succession planning, a total of 63 (44.7%) indicated that they had formal succession plans in place, while 75 (53.2%) did not have such plans. Of these 63 employers with formal succession plans in place, 47.6% were large organizations, while 41.3% were medium sized. Only 11.1% were small employers, which suggests that large and medium-sized organization are much better positioned to transition into the future, upon the retirement of its most experienced leaders. However, it remains a concern that only 63 of 141 (less than half) organizations are engaged in succession planning.
- Develop a program to have a variety of people representing various occupational and professional opportunities visit the high schools. Use data from the LMI Study to identify the occupations and trades that are projected to be in highest demand in the near future.
- Expand Explore the Trades to include other occupations and professions. Offer the program at times that are convenient to attract both students and parents.
- Develop web site/CD-Rom
- Develop functional marketing piece that will be valued by students.
- Work through guidance/career counsellors to educate them on the issues and opportunities

- Involve students in opportunities for co-op placements. Work with business to expand the range of co-op opportunities.

**Appendices**

**Appendix A**  
**North Bay LMI Survey Questionnaire**

North Bay

Labour Market Initiative Survey

2008

1	Interviewer ID Number	<table border="1" style="width: 100%; height: 40px;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> </table>							
2	Business ID Number	<table border="1" style="width: 100%; height: 40px;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> </table>							
3	In which of the following sectors is your business primarily involved?	1	Agriculture, Forestry, Hunting & Fishing	11	Real Estate & Rental & Leasing				
		2	Mining & Oil & Gas Extraction	12	Professional, Scientific & Technical Services				
		3	Utilities	13	Management of Companies & Enterprises				
		4	Construction	14	Administrative & Support, Waste Management & Remediation Services				
		5	Manufacturing	15	Educational Services				
		6	Wholesale Trade	16	Health Care & Social Assistance				
		7	Retail Trade	17	Arts, Entertainment & Recreation				
		8	Transportation & Warehousing	18	Accommodation & Food Services				
		9	Information & Cultural Industries	19	Other Services (except Public Administration)				
		10	Finance & Insurance	20	Public Administration				

4	Please check the main sectors that your business serves.	1	Agriculture, Forestry, Hunting & Fishing	11	Real Estate & Rental & Leasing
		2	Mining & Oil & Gas Extraction	12	Professional, Scientific & Technical Services
		3	Utilities	13	Management of Companies & Enterprises
		4	Construction	14	Administrative & Support, Waste Management & Remediation Services
		5	Manufacturing	15	Educational Services
		6	Wholesale Trade	16	Health Care & Social Assistance
		7	Retail Trade	17	Arts, Entertainment & Recreation
		8	Transportation & Warehousing	18	Accommodation & Food Services
		9	Information & Cultural Industries	19	Other Services (except Public Administration)
		10	Finance & Insurance	20	Public Administration
		5	At present how many people do you employ?	Full Time	
6	How many employees do you expect to have within the next 2 – 5 years?	Two Years		Five Years	
		Full Time	Part Time	Full Time	Part Time

7	<p>Please indicate the percentage of your labour force that falls into the following categories.</p> <p><b>Note: Persons with disabilities refers to those with physical impairment, sensory impairment, cognitive impairment, intellectual impairment, mental illness, and various types of chronic disease.</b></p>		None	1 – 10 %	11 – 20%	21 – 30 %	31 – 40%	41 – 50%	More than 50%
		First Generation Immigrants							
		Aboriginal Canadian							
		Persons with Disabilities							
8	<p>Would you be interested in hiring people with foreign credentials, if suitable candidates were available?</p>	1	Yes						
		2	No						
		3	Uncertain						
9	<p>What are the major disadvantages that you might see in hiring immigrants?</p>	1	Language Barriers						
		2	Difficulty in evaluating foreign credentials						
		3	Their lack of familiarity with the culture						
		4	Resistance from the current workforce						
		5	Low productivity						
		6	Cost/time associated with bringing in foreign candidates						
		7	Other						
10	<p>What are the major advantages that you might see in hiring immigrants?</p>	1	Ability to access range of skilled personnel						
		2	Range of language skills offered						
		3	High productivity						
		4	Work ethic						
		5	High Levels of Education						
		6	Loyalty / Low Turnover						
		7	Other						

<p>11</p> <p>In what occupations or trades do you experience difficulty in hiring qualified people at the <b>present time</b>?</p> <p>What type of training is required for these positions?</p> <p>1. University Degree 2. College Diploma 3. Certificate 4. On-the-job training is provided</p>		Job Title (please be specific)	Estimated Number Required Now	Type of Training required for this position
	1			
	2			
	3			
	4			
	5			
	6			
	7			
	8			
	9			
	10			
<p>12</p> <p>In what occupations or trades do you expect to be hiring over the next 2 – 5 years, to <b>accommodate growth or expansion (excluding attrition)</b>?</p> <p>What type of training is required for these positions?</p> <p>1. University Degree 2. College Diploma 3. Certificate 4. On-the-job training is provided</p>		Job Title (please be specific)	Estimated Number in next 2-5 years	Type of Training
	1			
	2			
	3			
	4			
	5			
	6			
	7			
	8			
	9			
	10			

13	How many licensed journeypersons work in your organization?  <b>If Not Applicable, please skip to Question #23</b>	<table border="1"> <tr> <td># of Journeypersons</td> <td>Not Applicable</td> </tr> <tr> <td> </td> <td> </td> </tr> </table>	# of Journeypersons	Not Applicable									
# of Journeypersons	Not Applicable												
14	How many unlicensed trades people work in your organization, excluding apprentices?	<table border="1"> <tr> <td># of Unlicensed Trades Persons</td> <td>Not Applicable</td> </tr> <tr> <td> </td> <td> </td> </tr> </table>	# of Unlicensed Trades Persons	Not Applicable									
# of Unlicensed Trades Persons	Not Applicable												
15	Do you engage apprentices as a component of your human resource strategy?	<table border="1"> <tr> <td>1</td> <td>Yes</td> </tr> <tr> <td>2</td> <td>No</td> </tr> <tr> <td>3</td> <td>Not Applicable</td> </tr> </table>		1	Yes	2	No	3	Not Applicable				
1	Yes												
2	No												
3	Not Applicable												
16	How familiar are you of the financial incentives provided by the Ministry of Training, Colleges and Universities to encourage the engaging of apprentices?	<table border="1"> <tr> <td>1</td> <td>Very Familiar</td> </tr> <tr> <td>2</td> <td>Somewhat Familiar</td> </tr> <tr> <td>3</td> <td>Not At All Familiar</td> </tr> <tr> <td>4</td> <td>Not Applicable</td> </tr> </table>		1	Very Familiar	2	Somewhat Familiar	3	Not At All Familiar	4	Not Applicable		
1	Very Familiar												
2	Somewhat Familiar												
3	Not At All Familiar												
4	Not Applicable												
17	Have you taken advantage of these incentives?	<table border="1"> <tr> <td>1</td> <td>Yes</td> </tr> <tr> <td>2</td> <td>No</td> </tr> <tr> <td>3</td> <td>Not Applicable</td> </tr> </table>		1	Yes	2	No	3	Not Applicable				
1	Yes												
2	No												
3	Not Applicable												
18	How many apprentices work in your organization?	<table border="1"> <tr> <td># of Apprentices</td> <td>Not Applicable</td> </tr> <tr> <td> </td> <td> </td> </tr> </table>	# of Apprentices	Not Applicable									
# of Apprentices	Not Applicable												
19	How many Apprentices do you plan on engaging over the next 2-5 years ?	<table border="1"> <tr> <td>Two Years</td> <td>Five Years</td> <td>Not Applicable</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>	Two Years	Five Years	Not Applicable								
Two Years	Five Years	Not Applicable											

20	What, if any, are the major challenges that you have had with apprenticeships?	<table border="1"> <tr><td>1</td><td>Finding motivated people as apprentices</td></tr> <tr><td>2</td><td>Cumbersome legislation/Bureaucratic requirements</td></tr> <tr><td>3</td><td>Concerns about safety and risk exposure</td></tr> <tr><td>4</td><td>Not enough journeypersons to supervise apprentices (Ratios)</td></tr> <tr><td>5</td><td>Lack of essential skills --- literacy, numeracy, etc.</td></tr> <tr><td>6</td><td>Union resistance</td></tr> <tr><td>7</td><td>Lack of emotional maturity</td></tr> <tr><td>8</td><td>Apprentices leave following training</td></tr> <tr><td>9</td><td>Reporting requirements/Paperwork burden</td></tr> <tr><td>10</td><td>Releasing them to go out of town for training</td></tr> <tr><td>11</td><td>Ratios of Apprentices to Journeypersons</td></tr> <tr><td>12</td><td>None</td></tr> <tr><td>13</td><td>Not Applicable</td></tr> </table>	1	Finding motivated people as apprentices	2	Cumbersome legislation/Bureaucratic requirements	3	Concerns about safety and risk exposure	4	Not enough journeypersons to supervise apprentices (Ratios)	5	Lack of essential skills --- literacy, numeracy, etc.	6	Union resistance	7	Lack of emotional maturity	8	Apprentices leave following training	9	Reporting requirements/Paperwork burden	10	Releasing them to go out of town for training	11	Ratios of Apprentices to Journeypersons	12	None	13	Not Applicable
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11	Ratios of Apprentices to Journeypersons																											
12	None																											
13	Not Applicable																											
21	How would you rate your level of satisfaction with apprentices, with respect to their ability to fill positions effectively in your organization?	<table border="1"> <tr><td>1</td><td>Excellent</td></tr> <tr><td>2</td><td>Good</td></tr> <tr><td>3</td><td>Poor</td></tr> <tr><td>4</td><td>Uncertain</td></tr> <tr><td>5</td><td>Not Applicable</td></tr> </table>	1	Excellent	2	Good	3	Poor	4	Uncertain	5	Not Applicable																
1	Excellent																											
2	Good																											
3	Poor																											
4	Uncertain																											
5	Not Applicable																											
22	Could you elaborate upon your experience with apprentices? <table border="1" style="width: 100%; height: 100px;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>																											

23	<p>Have you had interns in your organization in the past 3 years?</p> <p><b>An intern would be identified as an employee whose wage is subsidized by some form of Provincial or Federal program, such as FedNor or NOHFC. Typically, an intern would be under the age of 30.</b></p>	<table border="1"> <tr><td>1</td><td>Yes</td></tr> <tr><td>2</td><td>No</td></tr> <tr><td>3</td><td>Uncertain</td></tr> <tr><td>4</td><td>Not Applicable</td></tr> </table>	1	Yes	2	No	3	Uncertain	4	Not Applicable								
1	Yes																	
2	No																	
3	Uncertain																	
4	Not Applicable																	
24	<p>How familiar are you with the financial incentives from organizations such as FedNor and Northern Ontario Heritage Fund Corporation (NOHFC) that are available to engage interns?</p>	<table border="1"> <tr><td>1</td><td>Very Familiar</td></tr> <tr><td>2</td><td>Somewhat Familiar</td></tr> <tr><td>3</td><td>Not At All Familiar</td></tr> <tr><td>4</td><td>Not Applicable</td></tr> </table>	1	Very Familiar	2	Somewhat Familiar	3	Not At All Familiar	4	Not Applicable								
1	Very Familiar																	
2	Somewhat Familiar																	
3	Not At All Familiar																	
4	Not Applicable																	
25	<p>In what areas, if any, have you engaged interns?</p>	<table border="1"> <tr><td>1</td><td>Information Technology</td><td></td></tr> <tr><td>2</td><td>Administrative Support</td><td></td></tr> <tr><td>3</td><td>Marketing</td><td></td></tr> <tr><td>4</td><td>Other (S)</td><td></td></tr> <tr><td>5</td><td>None</td><td></td></tr> </table>	1	Information Technology		2	Administrative Support		3	Marketing		4	Other (S)		5	None		
1	Information Technology																	
2	Administrative Support																	
3	Marketing																	
4	Other (S)																	
5	None																	
26	<p>How many interns do you have at the present time?</p>	<input type="text"/>																
27	<p>What concerns do you have about engaging interns?</p>	<table border="1"> <tr><td>1</td><td>Concerns about safety</td></tr> <tr><td>2</td><td>Immaturity of young people in the workplace</td></tr> <tr><td>3</td><td>Bureaucratic requirements</td></tr> <tr><td>4</td><td>Investment is too great</td></tr> <tr><td>5</td><td>Lack of essential skills</td></tr> <tr><td>6</td><td>Other</td></tr> </table>	1	Concerns about safety	2	Immaturity of young people in the workplace	3	Bureaucratic requirements	4	Investment is too great	5	Lack of essential skills	6	Other				
1	Concerns about safety																	
2	Immaturity of young people in the workplace																	
3	Bureaucratic requirements																	
4	Investment is too great																	
5	Lack of essential skills																	
6	Other																	
28	<p>Do you have co-op students in your organization?</p>	<table border="1"> <tr><td>1</td><td>Yes</td></tr> <tr><td>2</td><td>No</td></tr> <tr><td>3</td><td>Uncertain</td></tr> <tr><td>4</td><td>Not Applicable</td></tr> </table>	1	Yes	2	No	3	Uncertain	4	Not Applicable								
1	Yes																	
2	No																	
3	Uncertain																	
4	Not Applicable																	

29	How many co-op students do you have at the present time?	1	High School	
		2	College	
		3	University	
30	How familiar are you with the high school co-op program?	1	Very familiar	
		2	Somewhat familiar	
		3	Not at all familiar	
31	How familiar are you with the College co-op program?	1	Very familiar	
		2	Somewhat familiar	
		3	Not at all familiar	
32	How familiar are you with the University co-op program?	1	Very familiar	
		2	Somewhat familiar	
		3	Not at all familiar	
33	If you do not take on co-op students at the present time, what, if any, changes in the program, would encourage you to take them on?	1	Changes in safety regulation	
		2	Better training in essential skills (reading, writing, mathematics, communication) , prior to co-op placements	
		3	Reduction in bureaucratic reporting requirements	
		4	Not Applicable	
		5	Other	
34	Have you offered retirement packages as an incentive for employees to retire within the past 3 years?	1	Yes	
		2	No	
		3	Other	
35	Does your organization have any strategies in place to encourage employees who plan to retire to continue contributing to the success of the business/organization?	1	Yes	
		2	No	
		3	Uncertain	

36	If strategies are in place to encourage certain retirees to continue contributing to the success of the company, could you briefly describe them and identify the types of services you are interested in retaining?	<table border="1" style="width: 100%; height: 100%;"> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> <tr><td> </td></tr> </table>									
37	What types of contributions could semi-retired and retired employees make to contribute to the success of your organization?	<table border="1" style="width: 100%; height: 100%;"> <tr><td style="width: 20px;">1</td><td>Mentoring</td></tr> <tr><td>2</td><td>Training</td></tr> <tr><td>3</td><td>Contract Services</td></tr> <tr><td>4</td><td>Other</td></tr> </table>	1	Mentoring	2	Training	3	Contract Services	4	Other	
1	Mentoring										
2	Training										
3	Contract Services										
4	Other										
38	Does your organization have a formal succession plan in place for skilled/key positions?	<table border="1" style="width: 100%; height: 100%;"> <tr><td style="width: 20px;">1</td><td>Yes</td></tr> <tr><td>2</td><td>No</td></tr> <tr><td>3</td><td>Other</td></tr> </table>	1	Yes	2	No	3	Other			
1	Yes										
2	No										
3	Other										
39	Do you feel your organization would benefit from a program aimed at improving skills, such as reading, writing, mathematics, communications, etc. (Essential Skills) in the in the workplace?	<table border="1" style="width: 100%; height: 100%;"> <tr><td style="width: 20px;">1</td><td>Yes</td></tr> <tr><td>2</td><td>No</td></tr> <tr><td>3</td><td>Unsure</td></tr> </table>	1	Yes	2	No	3	Unsure			
1	Yes										
2	No										
3	Unsure										

**Appendix B**  
**Detailed Labour Market Grid**  
**North Bay Census of Canada Data & North Bay Labour Market Study**

Please note that the NOC codes presented below include only 4 digit NOC codes, representing specific occupations in the labour force.

Column 1 includes the NOC code and name for each occupation in which people are employed in the City of North Bay.

Column 2 provides information on the total number of people employed in each NOC category.

Column 3 provides information on the number of people in each NOC code who are 40 years of age or older.

Column 4 provides information on employers' estimates of current employment requirements by NOC code, based on the survey that was conducted during the Summer of 2008.

Column 5 provides information on employers' estimates of future growth employment requirements over the next five years, based on the survey that was conducted during the Summer of 2008.

Column 6 projects current demand from 52.9% of the employee base to 100%. (52.9% represents the percentage of the labour force covered by our survey)

Column 7 projects Demand over the next five years from 52.9% of the employee base to 100%.

Column 8 provides information on retirement-based demand over the next five years, based on Statistics Canada data.

Column 9 provides information on retirement-based demand over the next ten years, based on Statistics Canada data.

Column 10 provides information on retirement-based demand over the next fifteen years, based on Statistics Canada data.

Column 11 provides information on retirement-based demand over the next twenty years, based on Statistics Canada data.

Column 12 is the total of current demand, growth demand over the next five years, plus retirement-based demand over the next five years.

North Bay Labour Market Initiative

Occupations	Total - All Age groups	Total 40 Years +	Current Demand	Growth Demand	Current Demand Factored 100%	Growth Demand Factored 100%	Retirement-Based Demand				Total Five Year Demand
							Demand 5 years	Demand 10 years	Demand 15 years	Demand 20 years	
<b>Total - Occupations (NOC 2006 - HRSD Canada)</b>	<b>29400</b>	<b>14835</b>	<b>805</b>	<b>1217</b>	<b>1522</b>	<b>2301</b>	<b>2385</b>	<b>5420</b>	<b>9120</b>	<b>12780</b>	<b>6207</b>
6421 Retail salespersons and sales clerks	1630	555	32	205	60	388	75	195	365	455	523
3152 Registered nurses	670	420	67	105	127	198	130	205	275	365	455
9511 Machining tool operators	10	10		165	0	312	0	0	0	10	312
6641 Food counter attendants, kitchen helpers and related occupa	850	240	20	50	38	95	15	75	125	210	147
0621 Retail trade managers	700	410	12	12	23	23	90	155	260	350	135
7612 Other trades helpers and labourers	15	0	20	39	38	74	0	0	0	0	112
1441 Administrative clerks	215	130	2	35	4	66	25	75	95	120	95
1111 Financial auditors and accountants	235	165	10	18	19	34	35	55	105	115	88
2174 Computer programmers and interactive media developers	80	25	4	30	8	57	10	10	10	25	74
3413 Nurse aides, orderlies and patient service associates	330	140	3	23	6	43	25	85	130	140	74
7411 Truck drivers	440	295	5	5	9	9	50	100	185	230	69
4142 Elementary school and kindergarten teachers	595	355			0	0	65	180	260	295	65
6661 Light duty cleaners	395	205	1	20	2	38	25	50	120	190	65
6663 Janitors, caretakers and building superintendents	420	280			0	0	60	105	190	235	60
0314 Managers in social, community and correctional services	65	45	8	10	15	19	25	45	45	45	59
1241 Secretaries (except legal and medical)	415	295	1	1	2	2	55	105	175	235	59
7316 Machine fitters	10	0	4	27	8	51	0	0	0	0	59
4152 Social workers	130	95	1	22	2	42	15	35	75	95	58
6611 Cashiers	780	195	1	4	2	8	45	70	130	170	54
7412 Bus drivers and subway and other transit operators	190	165	1	1	2	2	50	90	120	150	54
4212 Community and social service workers	320	125	1	10	2	19	30	75	85	115	51
1411 General office clerks	555	290	1	2	2	4	45	85	155	265	51
0631 Restaurant and food service managers	200	70	5	10	9	19	20	30	45	70	48
7311 Construction millwrights and ind. mechanics (except textile)	80	65	11	9	21	17	10	20	30	65	48
3414 Other assisting occupations in support of health services	105	75	10	14	19	26	0	10	30	65	45
7265 Welders and related machine operators	125	65	8	16	15	30	0	15	25	45	45
6211 Retail trade supervisors	265	140	14	4	26	8	10	65	95	140	44
7231 Machinists and machining and tooling inspectors	230	115	23		43	0	0	40	85	85	43
4131 College and other vocational instructors	220	145	1	5	2	9	30	55	105	130	41
4214 Early childhood educators and assistants	355	110	15	1	28	2	10	35	60	95	40
7321 Automotive service techs, truck and bus mechanics	250	110	6	10	11	19	10	35	70	90	40
1114 Other financial officers	105	75	4	6	8	11	20	30	50	75	39
1231 Bookkeepers	180	145	1	1	2	2	35	50	75	105	39
4112 Lawyers and Québec notaries	85	70	1	1	2	2	35	45	45	60	39
7211 Supervisors, machinists and related occupations	20	10		20	0	38	0	10	10	10	38
6683 Other elemental service occupations	65	10	20		38	0	0	0	0	0	38
2131 Civil engineers	65	50	5	7	9	13	15	25	40	40	38
4141 Secondary school teachers	440	170	2	2	4	4	30	55	120	155	38
6622 Grocery clerks and store shelf stockers	365	150			0	0	35	75	115	130	35
3142 Physiotherapists	10	0	4	14	8	26	0	0	0	0	34
3131 Pharmacists	45	25	10	8	19	15	0	0	15	15	34
1414 Receptionists and switchboard operators	355	135	1	1	2	2	30	50	75	100	34
3212 Medical laboratory technicians	15	15	2	15	4	28	0	0	0	15	32

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Occupations	Total - All Age groups	Total 40 Years +	Current Demand	Growth Demand	Current Demand Factored 100%	Growth Demand Factored 100%	Retirement-Based Demand				Total Five Year Demand
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0611 Sales, marketing and advertising managers	185	120	4	2	8	4	20	60	75	105	31
6472 Elementary and secondary school teacher assistants	265	135	10	1	19	2	10	40	70	120	31
2132 Mechanical engineers	10	10	5	6	9	11	10	10	10	10	31
0014 Senior managers - health, education, social & comm services	80	65			0	0	30	40	55	65	30
3111 Specialist physicians	80	90	5	5	9	9	10	45	55	60	29
0313 School principals elementary and secondary education	105	95	1	1	2	2	25	40	65	95	29
7241 Electricians (except industrial and power system)	50	10	7	8	13	15	0	0	0	0	28
6411 Sales representatives, wholesale trade (non-technical)	175	115	4	5	8	9	10	50	75	95	27
7452 Material handlers	215	45	1	8	2	15	10	20	20	45	27
6623 Other elemental sales occupations	370	95		1	0	2	25	40	55	75	27
3215 Medical radiation technologists	35	40	1	13	2	25	0	10	20	25	26
2241 Electrical and electronics engineering technologists & techs	40	20	6	8	11	15	0	0	20	20	26
1431 Accounting and related clerks	290	200	2	1	4	2	20	65	150	185	26
1232 Loan officers	65	30	1	7	2	13	10	10	30	30	25
6242 Cooks	470	130	4	4	8	8	10	25	70	115	25
2133 Electrical and electronics engineers	35	20	3	5	6	9	10	20	20	20	25
1462 Letter carriers	70	60			0	0	25	35	45	60	25
4121 University professors	95	60			0	0	25	25	45	60	25
7251 Plumbers	35	15	5	8	9	15	0	0	0	15	25
9422 Plastics processing machine operators	35	35	2	5	4	9	10	10	20	35	23
7421 Heavy equipment operators (except crane)	75	40	1	6	2	11	10	20	30	40	23
2253 Drafting technologists and technicians	40	30	6	1	11	2	10	20	20	30	23
7292 Glaziers	15	10	4	3	8	6	10	10	10	10	23
5241 Graphic designers and illustrators	50	30	4	2	8	4	10	10	10	30	21
3143 Occupational therapists	25	0	2	9	4	17	0	0	0	0	21
6231 Insurance agents and brokers	60	35	4	7	8	13	0	15	25	35	21
4216 Other instructors	70	10	1	10	2	19	0	0	10	10	21
7441 Residential and commercial installers and servicers	45	20	5	6	9	11	0	0	10	20	21
3141 Audiologists and speech-language pathologists	10	0	6	5	11	9	0	0	0	0	21
1224 Property administrators	145	120			0	0	20	55	55	85	20
3233 Licensed practical nurses	130	65			0	0	20	35	45	55	20
6474 Babysitters, nannies and parents' helpers	180	35			0	0	20	20	20	35	20
8612 Landscaping and grounds maintenance labourers	260	40	4	1	8	2	10	30	30	30	19
2143 Mining engineers	55	20	5	5	9	9	0	10	10	20	19
7315 Aircraft mechanics and aircraft inspectors	65	0	5	5	9	9	0	0	0	0	19
2147 Computer engineers (except software engineers)	25	30	3	7	6	13	0	0	10	15	19
6453 Food and beverage servers	375	80	1	1	2	2	15	30	45	80	19
7271 Carpenters	220	125	1	3	2	6	10	25	70	115	18
6221 Technical sales specialists, wholesale trade	50	45	2	2	4	4	10	10	10	20	18
2231 Civil engineering technologists and technicians	35	10	2	2	4	4	10	10	10	10	18
0123 Other business services managers	10	10	2	2	4	4	10	10	10	10	18
6251 Butchers, meat cutters & fishmongers, retail and wholesale	30	35	2	2	4	4	10	10	10	20	18
7312 Heavy-duty equipment mechanics	80	35	5	4	9	8	0	10	25	35	17

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6463 By-law enforcement and other regulatory officers, n.e.c.	10	10	1	8	2	15	0	0	10	10	17
0711 Construction managers	75	40	3		6	0	10	10	10	30	16
5244 Artisans and craftspersons	15	10	2	1	4	2	10	10	10	10	16
7611 Construction trades helpers and labourers	300	90	1	7	2	13	0	15	25	80	15
6671 Operators and attendants in amusement, recreation & sport	35	20	7	1	13	2	0	10	10	20	15
1453 Customer service, information and related clerks	780	150	2	6	4	11	0	20	65	140	15
6482 Estheticians, electrologists and related occupations	55	10	4	4	8	8	0	10	10	10	15
7351 Stationary engineers and auxiliary equipment operators	35	30	2	6	4	11	0	0	0	10	15
7313 Refrigeration and air conditioning mechanics	35	0	4	4	8	8	0	0	0	0	15
4164 Social policy researchers, consultants and program officers	25	10	4	4	8	8	0	0	10	10	15
7342 Tailors, dressmakers, furriers and milliners	30	25			0	0	15	25	25	25	15
2242 Electronic service techs (household and business equipment)	105	75			0	0	15	25	45	75	15
0112 Human resources managers	60	55	1	1	2	2	10	25	45	55	14
7294 Painters and decorators	50	30	1	1	2	2	10	20	30	30	14
7281 Bricklayers	40	35	1	1	2	2	10	20	35	35	14
0113 Purchasing managers	25	20	1	1	2	2	10	20	20	20	14
7291 Roofers and shinglers	80	20	1	1	2	2	10	10	10	10	14
2144 Geological engineers	10	10	1	1	2	2	10	10	10	10	14
1226 Conference and event planners	10	10	1	1	2	2	10	10	10	10	14
1221 Administrative officers	270	155	1	6	2	11	0	40	115	155	13
1433 Customer service representatives - financial services	150	45	6	1	11	2	0	10	25	45	13
7335 Other small engine and equipment mechanics	15	0	3	4	6	8	0	0	0	0	13
7244 Electrical power line and cable workers	25	20		1	0	2	10	20	20	20	12
7219 Contractors and supervisors, other const. trades, & installers,	50	45	1		2	0	10	20	30	45	12
3211 Medical laboratory technologists and pathologists' assistants	65	55		1	0	2	10	20	30	55	12
2263 Inspectors in public and environmental health & Occ Health	70	40	3	3	6	6	0	0	25	40	11
2251 Architectural technologists and technicians	10	0	3	3	6	6	0	0	0	0	11
2154 Land surveyors	10	10	3	3	6	6	0	0	0	10	11
6471 Visiting homemakers, housekeepers and related occupations	180	130			0	0	10	55	75	120	10
7414 Delivery and courier service drivers	225	120			0	0	10	45	65	95	10
0121 Insurance, real estate and financial brokerage managers	40	30			0	0	10	30	30	30	10
7216 Contractors and supervisors, mechanic trades	40	25			0	0	10	25	25	25	10
6662 Specialized cleaners	200	60			0	0	10	25	50	60	10
5121 Authors and writers	35	45			0	0	10	20	20	20	10
0016 Senior managers - goods production, utilities, transportation an	65	65			0	0	10	20	35	50	10
9442 Weavers, knitters and other fabric-making occupations	25	20			0	0	10	20	20	20	10
5133 Musicians and singers	25	30			0	0	10	20	20	25	10
4154 Ministers of religion	50	30			0	0	10	20	30	30	10
2171 Information systems analysts and consultants	80	35			0	0	10	20	20	35	10
1225 Purchasing agents and officers	20	20			0	0	10	20	20	20	10
1121 Specialists in human resources	35	30			0	0	10	20	20	30	10
0015 Senior managers - trade, broadcasting & other services, n.e.c.	45	40			0	0	10	20	20	30	10
3113 Dentists	30	20			0	0	10	20	20	30	10
0713 Transportation managers	65	55			0	0	10	20	30	45	10

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9514 Metalworking machine operators	15	20			0	0	10	15	15	15	10
6431 Travel counsellors	15	30			0	0	10	15	15	15	10
5111 Librarians	15	20			0	0	10	15	15	15	10
737 Crane Operators, Drillers and Blasters	10	10			0	0	10	10	10	10	10
4217 Other religious occupations	25	10			0	0	10	10	10	10	10
0011 Legislators	20	10			0	0	10	10	10	10	10
9513 Woodworking machine operators	25	30			0	0	10	10	25	25	10
9498 Other assemblers and inspectors	35	20			0	0	10	10	10	20	10
9496 Painters and coaters, industrial	20	10			0	0	10	10	10	10	10
9214 Supervisors, plastic and rubber products manufacturing	40	20			0	0	10	10	10	20	10
7422 Public works maintenance equipment operators	35	30			0	0	10	10	20	30	10
7361 Railway and yard locomotive engineers	55	40			0	0	10	10	25	40	10
6681 Dry cleaning and laundry occupations	45	10			0	0	10	10	10	10	10
6621 Service station attendants	115	30			0	0	10	10	10	20	10
5221 Photographers	20	10			0	0	10	10	10	10	10
5211 Library and archive technicians and assistants	40	10			0	0	10	10	10	10	10
4166 Education policy researchers, consultants a& program officers	45	40			0	0	10	10	20	30	10
4161 Natural and app science policy researchers, and consultants p	40	25			0	0	10	10	25	25	10
4155 Probation and parole officers and related occupations	35	20			0	0	10	10	10	20	10
4143 Educational counsellors	35	20			0	0	10	10	20	20	10
3144 Other professional occupations in therapy and assessment	10	10			0	0	10	10	10	10	10
3121 Optometrists	10	10			0	0	10	10	10	10	10
3114 Veterinarians	20	20			0	0	10	10	20	20	10
2212 Geological and mineral technologists and technicians	10	10			0	0	10	10	10	10	10
1475 Dispatchers and radio operators	105	40			0	0	10	10	20	40	10
1228 Immigration, employment insurance and revenue officers	10	10			0	0	10	10	10	10	10
1227 Court officers and justices of the peace	10	10			0	0	10	10	10	10	10
0641 Commissioned police officers	10	10			0	0	10	10	10	10	10
0512 Managers, publishing, motion pictures, broadcasting	10	10			0	0	10	10	10	10	10
0312 Administrators, post-secondary education & voc. training	55	45			0	0	10	10	30	45	10
8616 Logging and forestry labourers	30	20			0	0	10	10	10	20	10
9431 Sawmill machine operators	15	10			0	0	10	10	10	10	10
2223 Forestry technologists and technicians	15	20			0	0	10	10	15	15	10
1211 Supervisors, general office and administrative support clerks	15	20			0	0	10	10	10	15	10
0643 Commissioned officers, Armed Forces	85	30			0	0	10	10	20	30	10
7413 Taxi and limousine drivers and chauffeurs	125	85			0	0	10	35	50	50	10
9619 Other labourers in processing, manufacturing and utilities	50	30	1	4	2	8	0	20	30	30	9
2281 Computer network technicians	65	20	1	4	2	8	0	10	10	20	9
7252 Steamfitters, pipefitters and sprinkler system installers	30	10	1	4	2	8	0	10	10	10	9
4163 Business development officers and marketing researchers	20	0	3	2	6	4	0	0	0	0	9
2141 Industrial and manufacturing engineers	15	0	5		9	0	0	0	0	0	9
0111 Financial managers	90	40	2	3	4	6	0	0	30	40	9
4151 Psychologists	25	20	2	2	4	4	0	20	20	20	8
2151 Architects	20	10	2	2	4	4	0	10	10	10	8

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8614 Mine labourers	10	0	2	2	4	4	0	0	0	0	8
4213 Employment counsellors	30	0	1	3	2	6	0	0	0	0	8
7621 Public works and maintenance labourers	50	25	2	2	4	4	0	0	15	25	8
2175 Web designers and developers	20	10	1	3	2	6	0	0	10	10	8
1472 Storekeepers and parts clerks	115	30	1	2	2	4	0	20	30	30	6
0122 Banking, credit and other investment managers	45	45	2	1	4	2	0	10	35	45	6
0911 Manufacturing managers	60	20	1	2	2	4	0	10	20	20	6
4167 Recreation, sports and fitness program supervisors and	25	0	1	2	2	4	0	0	0	0	6
3132 Dieticians and nutritionists	15	10	2	1	4	2	0	0	0	10	6
2264 Construction inspectors	45	40	1	2	2	4	0	0	10	40	6
2243 Industrial instrument technicians and mechanics	10	0	2	1	4	2	0	0	0	0	6
2233 Ind. engineering and manufacturing technologists & techs	10	0	2	1	4	2	0	0	0	0	6
5122 Editors	15	20			0	0	5	5	5	5	5
6435 Hotel front desk clerks	90	25	1	1	2	2	0	15	15	15	4
5227 Support occupations in motion pictures, broadcasting	10	10	1	1	2	2	0	10	10	10	4
9614 Labourers in wood, pulp and paper processing	35	20	1	1	2	2	0	0	10	20	4
7331 Oil and solid fuel heating mechanics	10	0	1	1	2	2	0	0	0	0	4
7295 Floor covering installers	50	25	1	1	2	2	0	0	15	25	4
7284 Plasterers, drywall installers and finishers, and lathers	75	55	1	1	2	2	0	0	15	45	4
7245 Telecommunications line and cable workers	25	10	2		4	0	0	0	10	10	4
7232 Tool and die makers	25	10	1	1	2	2	0	0	0	0	4
7214 Contractors and supervisors, metal forming, shaping	10	0	1	1	2	2	0	0	0	0	4
6452 Bartenders	75	0	1	1	2	2	0	0	0	0	4
6262 Fire-fighters	60	10	1	1	2	2	0	0	10	10	4
6241 Chefs	90	10	1	1	2	2	0	0	10	10	4
1242 Legal secretaries	35	15	1	1	2	2	0	0	0	15	4
9227 Supervisors, other products manufacturing and assembly	10	10	1		2	0	0	0	10	10	2
7215 Contractors and supervisors, carpentry trades	20	10		1	0	2	0	0	0	10	2
6216 Other service supervisors	25	10		1	0	2	0	0	0	10	2
1122 Professional occupations in business services to management	45	25	1		2	0	0	0	10	25	2
6261 Police officers (except commissioned)	170	110			0	0	0	30	55	100	0
6464 Occupations unique to the Armed Forces	310	135			0	0	0	25	70	135	0
6233 Retail and wholesale buyers	50	45			0	0	0	25	25	25	0
6232 Real estate agents and salespersons	60	50			0	0	0	20	30	40	0
9421 Chemical plant machine operators	25	20			0	0	0	20	20	20	0
1432 Payroll clerks	55	40			0	0	0	20	30	40	0
4211 Paralegal and related occupations	85	40			0	0	0	20	40	40	0
0632 Accommodation service managers	60	20			0	0	0	20	20	20	0
7314 Railway carmen	70	70			0	0	0	15	45	60	0
2282 User support technicians	140	40			0	0	0	15	25	40	0
1463 Couriers, messengers and door-to-door distributors	115	35			0	0	0	15	25	35	0
1112 Financial and investment analysts	65	40			0	0	0	15	15	15	0
3112 General practitioners and family physicians	85	65			0	0	0	10	20	30	0
1235 Assessors, valuers and appraisers	30	25			0	0	0	10	10	10	0

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0721 Facility operation and maintenance managers	45	40			0	0	0	10	30	40	0
0013 Senior managers - financial, communications & oth bus serv.	50	45			0	0	0	10	35	45	0
9473 Binding and finishing machine operators	10	15			0	0	0	10	10	10	0
9452 Fabric, fur and leather cutters	10	10			0	0	0	10	10	10	0
9436 Lumber graders and other wood processing inspectors	10	20			0	0	0	10	10	10	0
9212 Supervisors, petroleum, gas & chemical processing & utilities	25	35			0	0	0	10	20	25	0
8256 Supervisors, landscape and horticulture	25	10			0	0	0	10	10	10	0
8254 Nursery and greenhouse operators and managers	10	15			0	0	0	10	10	10	0
8231 Underground production and development miners	35	20			0	0	0	10	20	20	0
7221 Supervisors, railway transport operations	25	30			0	0	0	10	20	25	0
6433 Airline sales and service agents	35	10			0	0	0	10	10	10	0
6252 Bakers	75	10			0	0	0	10	10	10	0
6215 Cleaning supervisors	20	25			0	0	0	10	20	20	0
5254 Program leaders and instructors in recreation, sport & fitness	195	45			0	0	0	10	10	45	0
5124 Prof. occupations in public relations and communications	55	45			0	0	0	10	10	35	0
4169 Other professional occupations in social science, n.e.c.	20	20			0	0	0	10	10	20	0
4165 Health policy researchers, consultants and program officers	55	35			0	0	0	10	10	25	0
4153 Family, marriage and other related counsellors	90	30			0	0	0	10	10	20	0
3151 Head nurses and supervisors	10	20			0	0	0	10	10	10	0
2272 Air traffic control and related occupations	55	20			0	0	0	10	10	20	0
2153 Urban and land use planners	10	10			0	0	0	10	10	10	0
2122 Forestry professionals	20	25			0	0	0	10	20	20	0
1442 Personnel clerks	40	30			0	0	0	10	20	20	0
0311 Managers in health care	80	60			0	0	0	10	30	60	0
0114 Other administrative services managers	65	40			0	0	0	10	30	30	0
9613 Labourers in chemical products processing and utilities	15	10			0	0	0	10	10	10	0
0811 Primary production managers (except agriculture)	15	10			0	0	0	10	10	10	0
7322 Motor vehicle body repairers	15	10			0	0	0	10	10	10	0
7263 Structural metal and platework fabricators and fitters	15	10			0	0	0	10	10	10	0
7242 Industrial electricians	30	10			0	0	0	10	10	10	0
6462 Correctional service officers	60	40			0	0	0	10	20	40	0
6271 Hairstylists and barbers	170	80			0	0	0	10	35	70	0
5131 Producers, directors, choreographers and related occupations	15	10			0	0	0	10	10	10	0
3232 Midwives and practitioners of natural healing	15	20			0	0	0	10	15	15	0
3217 Cardiology technologists	15	10			0	0	0	10	10	10	0
1244 Court recorders and medical transcriptionists	30	10			0	0	0	10	10	10	0
1233 Insurance adjusters and claims examiners	15	10			0	0	0	10	10	10	0
0513 Recreation, sports and fitness program and service directors	15	10			0	0	0	10	10	10	0
0131 Telecommunication carriers managers	15	20			0	0	0	10	10	15	0
2234 Construction estimators	15	20			0	0	0	5	5	5	0
9617 Labourers in food, beverage and tobacco processing	40	10			0	0	0	0	0	10	0
9616 Labourers in textile processing	20	10			0	0	0	0	0	10	0
9615 Labourers in rubber and plastic products manufacturing	25	10			0	0	0	0	10	10	0
9612 Labourers in metal fabrication	20	10			0	0	0	0	10	10	0

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9611 Labourers in mineral and metal processing	15	0			0	0	0	0	0	0	0
6651 Security guards and related occupations	215	105			0	0	0	0	20	45	0
3411 Dental assistants	50	20			0	0	0	0	10	20	0
0651 Other services managers	75	35			0	0	0	0	25	25	0
0012 Senior government managers and officials	15	10			0	0	0	0	0	0	0
9494 Furniture finishers and refinishers	10	0			0	0	0	0	0	0	0
9493 Other wood products assemblers and inspectors	20	10			0	0	0	0	0	10	0
9492 Furniture and fixture assemblers and inspectors	10	0			0	0	0	0	0	0	0
9491 Boat assemblers and inspectors	15	0			0	0	0	0	0	0	0
9486 Mechanical assemblers and inspectors	10	0			0	0	0	0	0	0	0
9484 Assemblers and inspectors, electrical appliance,	20	10			0	0	0	0	10	10	0
9483 Electronics assemblers, fabricators, inspectors and testers	10	10			0	0	0	0	0	0	0
9482 Motor vehicle assemblers, inspectors and testers	25	0			0	0	0	0	0	0	0
9472 Camera, platemaking and other pre-press occupations	10	10			0	0	0	0	10	10	0
9471 Printing machine operators	10	0			0	0	0	0	0	0	0
9462 Industrial butchers and meat cutters, poultry preparers	10	10			0	0	0	0	10	10	0
9441 Textile fibre and yarn preparation machine operators	10	10			0	0	0	0	0	10	0
9434 Other wood processing machine operators	10	10			0	0	0	0	10	10	0
9424 Water and waste plant operators	10	15			0	0	0	0	0	10	0
9423 Rubber processing machine operators and related workers	20	15			0	0	0	0	15	15	0
9413 Glass forming & finishing machine operators and glass cutters	10	0			0	0	0	0	0	0	0
9232 Petroleum, gas and chemical process operators	10	0			0	0	0	0	0	0	0
9221 Supervisors, motor vehicle assembling	10	0			0	0	0	0	0	0	0
9215 Supervisors, forest products processing	25	0			0	0	0	0	0	0	0
9211 Supervisors, mineral and metal processing	10	0			0	0	0	0	0	0	0
8432 Nursery and greenhouse workers	20	0			0	0	0	0	0	0	0
8422 Silviculture and forestry workers	10	10			0	0	0	0	0	10	0
8421 Chain-saw and skidder operators	10	10			0	0	0	0	10	10	0
8255 Landscaping and grounds maint. contractors and managers	25	0			0	0	0	0	0	0	0
8253 Farm supervisors and specialized livestock workers	10	0			0	0	0	0	0	0	0
7445 Other repairers and servicers	15	20			0	0	0	0	0	5	0
7443 Automotive mechanical installers and servicers	30	10			0	0	0	0	10	10	0
7442 Waterworks and gas maintenance workers	10	0			0	0	0	0	0	0	0
7437 Air transport ramp attendants	10	0			0	0	0	0	0	0	0
7432 Railway track maintenance workers	20	0			0	0	0	0	0	0	0
7383 Other trades and related occupations	25	10			0	0	0	0	0	10	0
7381 Printing press operators	10	10			0	0	0	0	0	10	0
7372 Drillers & blasters - surface mining, quarrying and construction	10	25			0	0	0	0	0	10	0
7362 Railway conductors and brakemen	25	10			0	0	0	0	0	0	0
7352 Power systems and power station operators	10	0			0	0	0	0	0	0	0
7334 Motorcycle and other related mechanics	10	0			0	0	0	0	0	0	0
7332 Electric appliance servicers and repairers	20	10			0	0	0	0	0	0	0
7283 Tilesetters	10	10			0	0	0	0	10	10	0
7282 Concrete finishers	10	10			0	0	0	0	10	10	0

North Bay Labour Market Initiative

Occupations	Total - All Age groups	Total 40 Years +	Current Demand	Growth Demand	Current Demand Factored 100%	Growth Demand Factored 100%	Retirement-Based Demand				Total Five Year Demand
							Demand 5 years	Demand 10 years	Demand 15 years	Demand 20 years	
7266 Blacksmiths and die setters	10	0			0	0	0	0	0	0	0
7264 Ironworkers	15	0			0	0	0	0	0	0	0
7262 Boilermakers	10	0			0	0	0	0	0	0	0
7253 Gas fitters	15	10			0	0	0	0	0	10	0
7247 Cable television service and maintenance technicians	10	0			0	0	0	0	0	0	0
7246 Telecommunications installation and repair workers	45	10			0	0	0	0	0	10	0
7243 Power system electricians	10	10			0	0	0	0	0	10	0
7217 Contractors & supervisors, heavy construction equip. crews	25	10			0	0	0	0	0	10	0
7212 Contractors & supervisors, electrical trades & tel. occupations	10	10			0	0	0	0	0	10	0
6672 Other attendants in accommodation and travel	20	0			0	0	0	0	0	0	0
6481 Image, social and other personal consultants	10	25			0	0	0	0	0	0	0
6465 Other protective service occupations	20	10			0	0	0	0	0	0	0
6451 Maîtres d'hôtel and hosts	40	0			0	0	0	0	0	0	0
6443 Casino occupations	10	0			0	0	0	0	0	0	0
6432 Purser and flight attendants	25	20			0	0	0	0	0	20	0
6213 Executive housekeepers	10	0			0	0	0	0	0	0	0
6212 Food service supervisors	95	10			0	0	0	0	0	10	0
5253 Sports officials and referees	10	0			0	0	0	0	0	0	0
5252 Coaches	10	0			0	0	0	0	0	0	0
5251 Athletes	10	0			0	0	0	0	0	0	0
5242 Interior designers	10	0			0	0	0	0	0	0	0
5224 Broadcast technicians	15	15			0	0	0	0	15	15	0
5223 Graphic arts technicians	15	10			0	0	0	0	0	10	0
5136 Painters, sculptors and other visual artists	25	20			0	0	0	0	0	10	0
5123 Journalists	15	10			0	0	0	0	0	10	0
4122 Post-secondary teaching and research assistants	70	0			0	0	0	0	0	0	0
3235 Other technical occupations in therapy and assessment	20	0			0	0	0	0	0	0	0
3234 Ambulance attendants and other paramedical occupations	20	0			0	0	0	0	0	0	0
3222 Dental hygienists and dental therapists	45	30			0	0	0	0	0	30	0
3219 Other medical techs/ & technicians (except dental health)	10	0			0	0	0	0	0	0	0
3218 Electroencephalographic & other diagnostic techs n.e.c.	10	0			0	0	0	0	0	0	0
3214 Resp. therapists, clin. perfusionists & cardio-pulmonary techs	10	10			0	0	0	0	0	10	0
3122 Chiropractors	35	10			0	0	0	0	0	0	0
2275 Railway traffic controllers and marine traffic regulators	15	15			0	0	0	0	15	15	0
2271 Air pilots, flight engineers and flying instructors	50	10			0	0	0	0	10	10	0
2255 Mapping and related technologists and technicians	10	0			0	0	0	0	0	0	0
2244 Aircraft inst/, electrical & avionics mechanics, technicians	35	15			0	0	0	0	0	15	0
2225 Landscape and horticultural technicians and specialists	25	10			0	0	0	0	10	10	0
2221 Biological technologists and technicians	15	0			0	0	0	0	0	0	0
2211 Chemical technologists and technicians	10	0			0	0	0	0	0	0	0
2172 Database analysts and data administrators	15	10			0	0	0	0	10	10	0
2148 Other professional engineers, n.e.c.	10	0			0	0	0	0	0	0	0
2134 Chemical engineers	15	0			0	0	0	0	0	0	0
2112 Chemists	10	0			0	0	0	0	0	0	0

North Bay Labour Market Initiative

Occupations	Total - All Age groups	Total 40 Years +	Current Demand	Growth Demand	Current Demand Factored 100%	Growth Demand Factored 100%	Retirement-Based Demand				Total Five Year Demand
							Demand 5 years	Demand 10 years	Demand 15 years	Demand 20 years	
1474 Purchasing and inventory clerks	50	35			0	0	0	0	20	35	0
1473 Production clerks	10	0			0	0	0	0	0	0	0
1471 Shippers and receivers	120	15			0	0	0	0	15	15	0
1461 Mail, postal and related clerks	30	10			0	0	0	0	0	10	0
1454 Survey interviewers and statistical clerks	40	10			0	0	0	0	0	0	0
1452 Correspondence, publication and related clerks	15	10			0	0	0	0	0	0	0
1451 Library clerks	15	10			0	0	0	0	0	0	0
1435 Collectors	15	0			0	0	0	0	0	0	0
1434 Banking, insurance and other financial clerks	20	0			0	0	0	0	0	0	0
1424 Telephone operators	20	0			0	0	0	0	0	0	0
1422 Data entry clerks	65	20			0	0	0	0	10	20	0
1413 Records management and filing clerks	45	25			0	0	0	0	10	25	0
1243 Medical secretaries	45	25			0	0	0	0	10	25	0
1223 Personnel and recruitment officers	35	15			0	0	0	0	15	15	0
1222 Executive assistants	25	10			0	0	0	0	0	0	0
1215 Supervisors, recording, distributing an scheduling occupations	10	10			0	0	0	0	10	10	0
1214 Supervisors, mail and message distribution occupations	15	0			0	0	0	0	0	0	0
1213 Supervisors, library, correspondence & rel'd information clerks	20	20			0	0	0	0	10	10	0
1113 Securities agents, investment dealers and brokers	10	10			0	0	0	0	0	10	0
0912 Utilities managers	10	10			0	0	0	0	0	10	0
0712 Residential home builders and renovators	45	15			0	0	0	0	15	15	0
0411 Gov't. managers, health & social policy development	10	10			0	0	0	0	10	10	0
0213 Computer and information systems managers	95	45			0	0	0	0	15	45	0
0211 Engineering managers	15	20			0	0	0	0	5	5	0

Source: Statistics Canada Census 2006 and Labour Market Group 2008 Labour Market Needs Study Data.

**Appendix C**  
**North Bay: Significant Employment Changes**  
**October 2008 – March 2009**

<b>Source</b>	<b>Date</b>	<b>Headline</b>	<b>Summary</b>
North Bay Nugget	October 22, 2008	'Gloomy' Times at Atlas Copco	Atlas Copco lays off 13 people from its North Bay Plant due to cancellation of mining orders
North Bay Nugget	December 13, 2008	Brighter Days at Atlas Copco	Union President, Ernie Giroux reported that a new agreement had been reached with Atlas Copco and that "production line producing rock bolts will increase from one shift to two on January 12, 2009. ... Giroux is optimistic that by March some of the former workers could be back on the job."
North Bay Nugget	November 5, 2008	Mining Bleeds More Jobs	Atlas Copco handed out an additional 24 pink slips Monday afternoon, cutting its workforce almost in half in less than two weeks. Ernie Giroux, President of Local 2412 stated that he's been told millions of dollars worth of orders have been cancelled and products returned. Giroux said some workers are planning on selling their homes and moving to British Columbia or southern Ontario to find employment. A total of 45 workers remain at the plant. Giroux said the plant could be reduced to one shift or 20 employees.
North Bay Nugget	January 30, 2009	Atlas Copco Cuts Another 13 Jobs	General Manager Jeff Hagar said 13 employees were laid off Thursday due to the world financial crisis.
North Bay Nugget	October 18, 2008	Dyno Nobel Cuts Staff to 12	Dyno Nobel trims staff by another two positions, leaving the local plant with a total workforce of only a dozen employees, down 42 from the 54 full-time employees last year.
North Bay Nugget	February 24, 2009	Dyno Nobel Staff Cut to 20	The plant has been bleeding jobs since Dyno Nobel purchased ETI about three years ago, slashing more than 100 positions.
North Bay Nugget	October 28, 2008	Boart Longyear Cutting 45 Jobs	Marc Vaillancourt, Vice-President of Local 2412 of the IAM said the layoffs affect 39 machinists and six stockroom workers. He said the company has pointed to the current depressed economic climate as the reason.
North Bay Nugget	February 14, 2009	Boart Longyear Cuts 31 Jobs	Since November, there have been three rounds of layoffs at Boart Longyear, affecting 115 employees. About 75 employees remain working in the shops at the Main Street West facility.

North Bay Nugget	March 20, 2009	Boart Longyear cuts 13 more jobs	This recent layoff reduces the workforce to 75 from 204 unionized workers during the peak of the mining boom last summer. ... Since November there have been four rounds of layoffs at Boart Longyear affecting 125 workers.
North Bay Nugget	January 14, 2009	Back to School	Brad Diggles didn't waste time getting his career back on course. As one of 84 workers laid off by Boart Longyear, Diggles is now one of 18 Second Career students in Canadore College's electrical techniques program, with a special intake created to handle high demand from people seeking practical and academic trades education.
North Bay Nugget	October 28, 2008	ONR Union Fights Layoffs	Union leaders at Ontario Northland are trying to convince managers there is no need to lay off 29 workers while a major rail freight customer deals with a strike in Timmins. ONR President Steve Carmichael said "we find ourselves in the position of having to take cost-cutting measures that will help us to offset the effects of reduced freight traffic brought about as a result of this strike".
North Bay Nugget	November 5, 2008	TeleTech Slashes 95 Workers	Teletch announced the layoff of 95 full-time workers in North Bay by December 31, 2008. The company blames the layoffs on the changing needs of one of its North American clients.
North Bay Nugget	November 27, 2008	Call Centre Cancels Layoffs	TeleTech says it will not lay off 95 workers by the end of the year after all. Teletch has gained some additional opportunities through the same client whose loss of business had led to the original layoff announcement.
North Bay Nugget	November 15, 2008	Motion Canada lays off 26 Employees	Motion Canada has temporarily laid off 26 employees to help the Gormanville Road manufacturing facility weather the recent downturn. There are now 55 staff left on the payroll and branch manager Kelly McCarthy said this should be the extent of their cuts.
North Bay Nugget	November 22, 2008	Uncertain Economy Hits Another Employer	Arclin Canada Ltd. --- formerly Dynea --- has laid off five workers to help cope with reduced sales due to the financial crisis plaguing the world economy.
North Bay Nugget	December 6, 2008	Local Manufacturing Company Expands Operation	Nipissing MPP Monique Smith ... announced a \$1.5 million Northern Ontario Heritage Fund loan for Rotocan to expand its local manufacturing company, which specializes in rotary bits for the mining industry. ... The expansion could mean six new jobs over the next year within the company.
North Bay	December 17,	Sun Media Cuts 600 Jobs Amid 'Economic	The impact will be felt locally as six North Bay Nugget employees lose their jobs. Nugget Publisher, Dan Johnson

Nugget	2008	Hardship'	stated that 'revenue is declining., costs are increasing and nobody is forecasting a quick turnaround'.
North Bay Nugget	December 18, 2008	Redpath Lays Off 37 People	The Redpath Group laid off 37 local office and shop workers this week and transferred seven employees to various job sites as the company adapts to a global slowdown in mining activity.
North Bay Nugget	February 7, 2009	Paving the Future	Industry Minister Tony Clement announced Friday the federal government will provide \$10.3 million the long-sought-after funding needed to repave the landing strip so that it's ready to accept planes next summer when cottage country plays host to the world's top industrialized nations.
North Bay Nugget	February 10, 2009	Xstrata cuts 686 Jobs in Sudbury	Monday's cuts reflect tough times in the mining industry, as companies cut jobs and shut down mines in reaction to falling prices and slumping demand for copper, zinc, aluminum and other base metals.
North Bay Nugget	March 4, 2009	Nickel Giant to Cut 261 Jobs in Sudbury	Vale Inco Ltd. said Tuesday it will cut more than 400 white-collar jobs in Canada as it continues to restructure its operations amid slumping nickel prices.
North Bay Nugget	February 14, 2009	Tembec Closes Mattawa Operation	Tembec announces on Friday that it was reducing costs by permanently closing the Mattawa sawmill and cutting 100 positions. The bad news spread to neighbouring communities like Temiscaming, where Tembec cut 100 jobs, through terminations, layoffs and retirements.
North Bay Nugget	February 27, 2009	Stantec Cuts 11 Jobs in City	There are 70 people remaining on the Stantec payroll in North Bay and 65 in Sudbury.
North Bay Nugget	March 5, 2009	Columbia Shutdown will Affect 50 Workers	Columbia Forest Products is planning a five-week shutdown of its Rutherglen veneer plant due to slumping sales amid a sinking world economy. Columbia laid off 50 employees at the local plant in January and about 150 workers in 2006.
North Bay Nugget	March 10, 2009	Job Cuts Among Tough Measures	Facing increased operating costs, lower enrolment and less revenue, Nipissing University announced Monday it has cut 10 jobs in an effort to reduce a projected deficit of \$4 million for 2009-10. Five sabbatical replacements for 2009-10 will not be approved, while certain contracts and positions won't be renewed and service hours in some areas have been reduced.
North Bay Nugget	March 19, 2009	Fabrene Closes Plant for Week	For the first time in its history, PGI Fabrene has implemented a one-week spring shutdown, a company spokesman has confirmed.

The above cuts amount to the loss of a total of approximately 300 jobs in the City of North Bay. Most of them are in the mining supply sector.

**Appendix D**  
**North Bay Situational Analysis**

Areas of Strength

- Several Industry Sectors that act as drivers to create wealth and jobs
  - Mining Manufacturing Equipment and Services
  - Aviation/Aerospace
  - Small Business
  - Tourism/Hospitality
  - Institutional --- Health/Government/Education
  - ICT Sector
  - Transportation --- Road, Rail and Air
  - Retirement Industry
- Natural endowments, including, beautiful location on two lakes
- Four lane access to GTA
- Proximity to GTA
- Regional Airport (10,000 ft runway)
- Excellent transportation infrastructure
  - Air Canada regular scheduled service to Toronto with 3 flights per day,
  - Rail centre(ONTC, CPR, CNR, OVR),
  - Crossroads of Hwy 11 and 17,
  - Freight Lines, and
  - Two major coach carriers (ONR, Greyhound).
- Strong historical presence in the mining manufacturing/service sector
- Competitive Industrial Tax Rates
- Vibrant Downtown --- Niche retailing, New Medical Arts Centre, Waterfront Park, Stantec Head Office, Cementation, J.S. Redpath
- Affordable Serviced Industrial Land (up to \$20,000 per acre) --- Airside, Groundside
- Strong Bilingual Sector
- Excellent regional shopping facilities with four, strong commercial nodes
- Vibrant Arts Community
  - Capitol Centre
  - Several theatre groups
  - Exciting live music scene
  - Cooperative artist gallery
- Public and private access to a range of financial incentives --- FedNor, CFDCs, NOHFC
- Diversified Economy
- Natural Beauty
- Competitive Wage Rates
- Safe environment (Recently, in March 2009, a Maclean's study of the 100 most populated cities ranked North Bay below the national average and below other Northern Ontario cities in crime rates).
- Ongoing large capital construction projects --- Regional Hospital, One Kids' Place, Canadore/Nipissing Projects/Library, Waterfront Park Project
- Regional Health Care Facilities --- North Bay General Hospital, North Bay Psychiatric Hospital, One Kids Place
- The presence of post secondary educational institutions --- Canadore College and private career colleges
  - Year after year, Nipissing University continues to place extremely well on evaluative exercises in

which students provide feedback, which enhances North Bay's reputation as a university town.

- Recreational Facilities --- YMCA. Private fitness centres, Memorial Gardens, Pete Palangio Arena, West Ferris Arena, Kate Pace Way, College Trails, Cross Country Ski Facilities, Laurentian Ski Hill, Laurier Woods, Otter Lake.

#### Areas Requiring Attention

- Aging labour force
- Shortage of family physicians
- Skilled Trades shortages
- Small multicultural community
- Lack of large convention centre
- Limited availability of affordable rental housing
- Deteriorating physical infrastructure
- Educational attainment rates among North Bay population continue to wane, resulting from bleeding, whereby many of North Bay's youngest, most highly educated, innovative people gravitate away from North Bay towards creative zones, such as Toronto, Montreal and Vancouver.

#### Potential Opportunities

- North Bay is a niche player based on the following economic development criteria:
  - 1. Highly engineered products & services
  - 2. High margin products & services
  - 3. Low volume, non-freight sensitive products & services
  - 4. Services & products with global markets
  - 5. Sector diversification

Source: Rick Evans, Economic Development Manager, City of North Bay
- Growing multi cultural composition of the Canadian Labour Force
- Leverage successes in the mining manufacturing sector to create a marketing campaign designed to highlight North Bay as a high-grade investment region.
- Globalization of corporate structure and consumer demand
- Expansion of Post Secondary Education - Encourage continuing investment in Post Secondary educational institutions to attract an increasing number of students from Southern Ontario
- Growth of Aerospace --- Market and promote lower costs of operating from the North Bay Regional Airport. This will attract new/expanded aerospace and other industry
- Growth of ICT Sector – Develop marketing strategy to attract ICT sector businesses
- Growth in Health Care - Utilize new North Bay Regional Health Centre to attract health care professionals to the area to expand ancillary services
- Growth in Renewable Energy Sector - Expansion of renewable energy sector
- Growth in Advanced Manufacturing
- Capitalize on Retirement Residential Opportunities
  - Marina Point
  - Empire Living Centre
  - The Beaches
  - Harbourside
  - Watersun
  - Delaney Bay

- Others
- Develop high-tech marketing tools, incorporating items from this Analysis
- Develop waterfront properties through Brownfields CIP
- Growth in Sports Infrastructure to support local demand and attract more tournaments to the area.
  - Memorial Gardens Renovations
  - Proposed Sportsplex Centre

Other Concerns

- Traditionally, North Bay and Northern Ontario in general, has not been regarded by investors outside the community as a high-grade investment opportunity, except in certain niche markets such as mining manufacturing and other resource development opportunities.
- Presence of “creative zones,” such as Toronto, Ottawa and Montreal, within close geographic proximity, which tend to act as magnets, drawing away our most promising residents.
- Volatility of Canadian/U.S. dollar relationship, making it difficult for businesses that export
- The presence of various bedroom communities outside North Bay, whose physical beauty and low tax rates heighten their attractiveness, but deprive North Bay of much needed tax revenue.
- Weakening U.S. economy
- Weakening worldwide, consumer demand
- High energy prices
- Volatile gasoline prices
- International security concerns
- Emerging markets in India and China, which produce a great deal, but consume very little.
- Low-wage manufacturing and service jobs in developing nations
- Canadian municipal infrastructure deficit of \$123 million. Additionally, as at 2007, 79% of the useful service life of this infrastructure has been exhausted, meaning that it will soon require replacement.<sup>38</sup>
- Globalization of corporate structure and consumer demand
- Ontario/Canada fiscal imbalance
- Recently ('08/'09), there has been an increased rate of cynicism within media, which creates a snowball effect, thus dampening consumer demand and heightening volatility in the business cycle/capital markets.
- Low Canadian Birth Rate
- Increasing intervention of government in business

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<sup>38</sup> Dr. Saeed Mirza, “Danger Ahead: The Coming Collapse of Canada’s Municipal Infrastructure” prepared for the Federation of Canadian Municipalities, November 2007, <http://www.fcm.ca/CMFiles/mdeficit1OPT-792008-3425.pdf>, (accessed March 14, 2009).

**Appendix E**  
**OMAFRA Competitive Advantage Analysis**

Sectors (NAICS)	Industry Targeting	Employment Growth Ontario	# jobs '01 North Bay C	# jobs '06 North Bay C	% of total Labour Force	Employment Growth North Bay C	Actual Change (# jobs) North Bay C	% Employment North Bay C 2006
<b>All industries</b>		<b>6.06%</b>	<b>26,080</b>	<b>27,910</b>	<b>100</b>	<b>7.02%</b>	<b>1,830</b>	
<b>72 Accommodation and food services</b>	<b>Current Strength</b>	<b>6.55%</b>	<b>2,015</b>	<b>2,150</b>	<b>7.7</b>	<b>6.70%</b>	<b>135</b>	<b>7.70</b>
7211 Traveller accommodation	Current Strength	8.06%	275	465	<b>1.7</b>	69.09%	190	1.67
7223 Special food services	Emerging Strength	6.56%	55	65	<b>0.2</b>	18.18%	10	0.23
7221 Full-service restaurants	High priority retention target	1.66%	745	740	<b>2.7</b>	-0.67%	-5	2.65
7222 Limited-service eating places	<b>High priority retention target</b>	<b>11.03%</b>	865	795	<b>2.8</b>	<b>-8.09%</b>	<b>70</b>	<b>2.85</b>
7224 Drinking places (alcoholic beverages)	High priority retention target	14.50%	70	75	<b>0.3</b>	7.14%	5	0.27
7212 RV (recreational vehicle) parks and recreational camps	Prospects limited due to weak base and declining competitiveness	4.18%	10	0	<b>0.0</b>	-100.00%	-10	-
7213 Rooming and boarding houses	<b>No basis for Evaluation</b>	8.33%	0	10	<b>0.0</b>	na	10	0.04
<b>48-49 Transportation and warehousing</b>	<b>Current Strength</b>	<b>5.96%</b>	<b>1,595</b>	<b>1,795</b>	<b>6.4</b>	<b>12.54%</b>	<b>200</b>	<b>6.43</b>
4853 Taxi and limousine service	Current Strength	6.82%	45	70	<b>0.3</b>	55.56%	25	0.25
4855 Charter bus industry	Current Strength	72.73%	10	35	<b>0.1</b>	250.00%	25	0.13
4881 Support activities for air transportation	Current Strength	25.65%	55	100	<b>0.4</b>	81.82%	45	0.36
4882 Support activities for rail transportation	Current Strength	58.18%	10	25	<b>0.1</b>	150.00%	15	0.09
4884 Support activities for road transportation	Current Strength	10.69%	15	25	<b>0.1</b>	66.67%	10	0.09
4922 Local messengers and local delivery	Current Strength	19.78%	25	50	<b>0.2</b>	100.00%	25	0.18
4851 Urban transit systems	Emerging Strength	19.32%	15	50	<b>0.2</b>	233.33%	35	0.18
4811 Scheduled air transportation	Prospects limited by external trends	-15.31%	120	200	<b>0.7</b>	66.67%	80	0.72

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Sectors (NAICS)	Industry Targeting	Employment Growth Ontario	# jobs '01 North Bay C	# jobs '06 North Bay C	% of total Labour Force	Employment Growth North Bay C	Actual Change (# jobs) North Bay C	% Employment North Bay C 2006
4812 Non-scheduled air transportation	Prospects limited by external trends	-29.16%	10	35	<b>0.1</b>	250.00%	25	0.13
4821 Rail transportation	Prospects limited by external trends	-17.84%	355	345	<b>1.2</b>	-2.82%	-10	1.24
4852 Interurban and rural bus transportation	Prospects limited by external trends	-21.20%	75	65	<b>0.2</b>	-13.33%	-10	0.23
4921 Couriers	Prospects limited by external trends	-2.58%	55	70	<b>0.3</b>	27.27%	15	0.25
4841 General freight trucking	High priority retention target	5.99%	320	315	<b>1.1</b>	-1.56%	-5	1.13
4842 Specialized freight trucking	High priority retention target	7.30%	135	110	<b>0.4</b>	-18.52%	-25	0.39
4854 School and employee bus transportation	High priority retention target	5.98%	130	135	<b>0.5</b>	3.85%	5	0.48
4862 Pipeline transportation of natural gas	High priority retention target	15.38%	25	10	<b>0.0</b>	-60.00%	-15	0.04
4859 Other transit and ground passenger transportation	Prospects limited due to weak base and declining competitiveness	10.12%	10	0	<b>0.0</b>	-100.00%	-10	-
4911 Postal service	Prospects limited due to weak base and declining competitiveness	4.81%	120	100	<b>0.4</b>	-16.67%	-20	0.36
4931 Warehousing and storage	Prospects limited due to weak base and declining competitiveness	10.49%	35	15	<b>0.1</b>	-57.14%	-20	0.05
4831 Deep-sea, coastal and great lakes water transportation	Prospects limited overall	-22.70%	10	0	<b>0.0</b>	-100.00%	-10	-
4832 Inland water transportation	Prospects limited overall	-20.51%	10	0	<b>0.0</b>	-100.00%	-10	-
4889 Other support activities for transportation	Prospects limited overall	-9.38%	15	0	<b>0.0</b>	-100.00%	-15	-
4861 Pipeline transportation of crude oil	<b>No basis for Evaluation</b>	-77.27%	0	0	<b>0.0</b>	na	-	-
4869 Other pipeline transportation	<b>No basis for Evaluation</b>	<b>44.44%</b>	0	10	<b>0.0</b>	<b>na</b>	<b>10</b>	<b>0.04</b>

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Sectors (NAICS)	Industry Targeting	Employment Growth Ontario	# jobs '01 North Bay C	# jobs '06 North Bay C	% of total Labour Force	Employment Growth North Bay C	Actual Change (# jobs) North Bay C	% Employment North Bay C 2006
4871 Scenic and sightseeing transportation, land	<b>No basis for Evaluation</b>	-75.81%	0	0	<b>0.0</b>	na	-	-
4872 Scenic and sightseeing transportation, water	<b>No basis for Evaluation</b>	13.79%	0	15	<b>0.1</b>	na	15	0.05
4879 Scenic and sightseeing transportation, other	<b>No basis for Evaluation</b>	-80.00%	0	0	<b>0.0</b>	na	-	-
4883 Support activities for water transportation	<b>No basis for Evaluation</b>	25.00%	0	0	<b>0.0</b>	na	-	-
4885 Freight transportation arrangement	<b>No basis for Evaluation</b>	35.66%	0	15	<b>0.1</b>	na	15	0.05
<b>56 Administrative/Waste Mgmt/Remediation Services</b>	<b>Current Strength</b>	<b>19.22%</b>	<b>910</b>	<b>1,400</b>	<b>5.0</b>	<b>53.85%</b>	<b>490</b>	<b>5.02</b>
5611 Office administrative services	Current Strength	54.17%	25	40	<b>0.1</b>	60.00%	15	0.14
5614 Business support services	Current Strength	69.01%	350	850	<b>3.0</b>	142.86%	500	3.05
5613 Employment services	Emerging Strength	11.05%	40	65	<b>0.2</b>	62.50%	25	0.23
5615 Travel arrangement and reservation services	Prospects limited by weak base and external trends	-11.06%	25	35	<b>0.1</b>	40.00%	10	0.13
5616 Investigation and security services	High priority retention target	24.23%	115	135	<b>0.5</b>	17.39%	20	0.48
5617 Services to buildings and dwellings	High priority retention target	0.92%	270	230	<b>0.8</b>	-14.81%	40	0.82
5622 Waste treatment and disposal	High priority retention target	14.60%	35	20	<b>0.1</b>	-42.86%	15	0.07
5619 Other support services	Prospects limited due to weak base and declining competitiveness	21.49%	45	25	<b>0.1</b>	-44.44%	20	0.09
5629 Remediation and other waste management services	Prospects limited due to weak base and declining competitiveness	3.04%	10	0	<b>0.0</b>	-100.00%	10	-
5612 Facilities support services	<b>No basis for Evaluation</b>	-51.55%	0	0	<b>0.0</b>	na	-	-
5621 Waste collection	<b>No basis for Evaluation</b>	90.27%	0	0	<b>0.0</b>	na	-	-

Sectors (NAICS)	Industry Targeting	Employment Growth Ontario	# jobs '01 North Bay C	# jobs '06 North Bay C	% of total Labour Force	Employment Growth North Bay C	Actual Change (# jobs) North Bay C	% Employment North Bay C 2006
<b>81 Other services (except public administration)</b>	<b>Current Strength</b>	<b>9.18%</b>	<b>1,210</b>	<b>1,395</b>	<b>5.0</b>	<b>15.29%</b>	<b>185</b>	<b>5.00</b>
8113 Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	Current Strength	3.80%	90	115	<b>0.4</b>	27.78%	25	0.41
8133 Social advocacy organizations	Current Strength	32.02%	30	60	<b>0.2</b>	100.00%	30	0.21
8134 Civic and social organizations	Current Strength	13.49%	65	120	<b>0.4</b>	84.62%	55	0.43
8139 Business, professional, labour and other membership organizations	Current Strength	11.80%	90	120	<b>0.4</b>	33.33%	30	0.43
8141 Private households	<b>Current Strength</b>	<b>10.43%</b>	80	90	<b>0.3</b>	<b>12.50%</b>	<b>10</b>	<b>0.32</b>
8114 Personal and household goods repair and maintenance	Prospects limited by external trends	-2.96%	60	80	<b>0.3</b>	33.33%	20	0.29
8123 Dry-cleaning and laundry services	Prospects limited by external trends	-3.68%	40	80	<b>0.3</b>	100.00%	40	0.29
8112 Electronic and precision equipment repair and maintenance	Prospects limited by weak base and external trends	-16.14%	10	15	<b>0.1</b>	50.00%	5	0.05
8111 Automotive repair and maintenance	High priority retention target	3.20%	305	310	<b>1.1</b>	1.64%	5	1.11
8121 Personal care services	High priority retention target	22.46%	260	270	<b>1.0</b>	3.85%	10	0.97
8122 Funeral services	Prospects limited due to weak base and declining competitiveness	16.93%	20	20	<b>0.1</b>	0.00%	-	0.07
8131 Religious organizations	Prospects limited due to weak base and declining competitiveness	8.18%	115	95	<b>0.3</b>	-17.39%	-20	0.34
8132 Grant-making and giving services	Prospects limited due to weak base and declining competitiveness	11.11%	10	10	<b>0.0</b>	0.00%	-	0.04

Sectors (NAICS)	Industry Targeting	Employment Growth Ontario	# jobs '01 North Bay C	# jobs '06 North Bay C	% of total Labour Force	Employment Growth North Bay C	Actual Change (# jobs) North Bay C	% Employment North Bay C 2006
8129 Other personal services	<b>Prospects limited overall</b>	<b>-0.50%</b>	35	15	<b>0.1</b>	<b>-57.14%</b>	- 20	<b>0.05</b>
<b>53 Real estate and rental and leasing</b>	<b>Current Strength</b>	<b>14.51%</b>	<b>440</b>	<b>550</b>	<b>2.0</b>	<b>25.00%</b>	<b>110</b>	<b>1.97</b>
5311 Lessors of real estate	Current Strength	13.84%	100	180	<b>0.6</b>	80.00%	80	0.64
5313 Activities related to real estate	Current Strength	14.19%	70	100	<b>0.4</b>	42.86%	30	0.36
5324 Commercial and industrial machinery and equipment rental and leasing	Prospects limited by external trends	-3.12%	15	40	<b>0.1</b>	166.67%	25	0.14
5322 Consumer goods rental	High priority retention target	1.46%	95	70	<b>0.3</b>	-26.32%	- 25	0.25
5312 Offices of real estate agents and brokers	Prospects limited due to weak base and declining competitiveness	28.56%	115	130	<b>0.5</b>	13.04%	15	0.47
5321 Automotive equipment rental and leasing	Prospects limited due to weak base and declining competitiveness	1.69%	40	25	<b>0.1</b>	-37.50%	- 15	0.09
5323 General rental centres	Prospects limited overall	-36.49%	10	0	<b>0.0</b>	-100.00%	- 10	-
5331 Lessors of non-financial intangible assets (except copyrighted works)	<b>No basis for Evaluation</b>	3.59%	0	0	<b>0.0</b>	na	-	-
<b>21 Mining and oil and gas extraction</b>	<b>Current Strength</b>	<b>18.05%</b>	<b>215</b>	<b>365</b>	<b>1.3</b>	<b>69.77%</b>	<b>150</b>	<b>1.31</b>
2131 Support activities for mining and oil and gas extraction	Current Strength	67.83%	145	310	<b>1.1</b>	113.79%	165	1.11

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2123 Non-metallic mineral mining and quarrying	Prospects limited by external trends	-2.81%	30	35	0.1	16.67%	5	0.13
2199 Mining - unspecified	<b>High priority retention target</b>	<b>7.87%</b>	10	10	<b>0.0</b>	<b>0.00%</b>	-	<b>0.04</b>
2122 Metal ore mining	Prospects limited due to weak base and declining competitiveness	0.56%	25	10	0.0	-60.00%	-15	0.04
2111 Oil and gas extraction	<b>No basis for Evaluation</b>	<b>352.63%</b>	0	0	<b>0.0</b>	<b>na</b>	-	-
2121 Coal mining	<b>No basis for Evaluation</b>	<b>380.00%</b>	0	0	<b>0.0</b>	<b>na</b>	-	-
<b>54 Professional, scientific and technical services</b>	<b>Emerging Strength</b>	<b>8.97%</b>	<b>1,135</b>	<b>1,340</b>	<b>4.8</b>	<b>18.06%</b>	<b>205</b>	<b>4.80</b>
5413 Architectural, engineering and related services	Current Strength	11.53%	275	370	1.3	34.55%	95	1.33
5419 Other professional, scientific and technical services	Current Strength	21.25%	55	145	0.5	163.64%	90	0.52
5414 Specialized design services	Emerging Strength	10.61%	30	40	0.1	33.33%	10	0.14
5417 Scientific research and development services	Emerging Strength	27.07%	10	15	0.1	50.00%	5	0.05
5418 Advertising and related services	Emerging Strength	16.03%	20	40	0.1	100.00%	20	0.14
5411 Legal services	High priority retention target	12.34%	240	245	0.9	2.08%	5	0.88
5412 Accounting, tax preparation, bookkeeping and payroll services	High priority retention target	9.54%	200	200	0.7	0.00%	-	0.72
5415 Computer systems design and related services	Prospects limited due to weak base and declining competitiveness	0.14%	130	115	0.4	-11.54%	-15	0.41
5416 Management, scientific and technical consulting services	Prospects limited due to weak base and declining competitiveness	1.60%	170	160	0.6	-5.88%	-10	0.57
<b>41 Wholesale trade</b>	<b>Emerging Strength</b>	<b>9.08%</b>	<b>685</b>	<b>910</b>	<b>3.3</b>	<b>32.85%</b>	<b>225</b>	<b>3.26</b>

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4131 Food wholesaler-distributors	Current Strength	32.64%	85	120	<b>0.4</b>	41.18%	35	0.43
4181 Recyclable material wholesaler-distributors	Current Strength	32.77%	20	40	<b>0.1</b>	100.00%	20	0.14
4182 Paper, paper product and disposable plastic product wholesaler-distributors	Current Strength	8.62%	10	45	<b>0.2</b>	350.00%	35	0.16
4184 Chemical (except agricultural) and allied product wholesaler-distributors	Current Strength	17.50%	20	40	<b>0.1</b>	100.00%	20	0.14
4179 Other machinery, equipment and supplies wholesaler-distributors	Emerging Strength	10.17%	50	80	<b>0.3</b>	60.00%	30	0.29
4189 Other miscellaneous wholesaler-distributors	Emerging Strength	11.60%	15	20	<b>0.1</b>	33.33%	5	0.07
4121 Petroleum product wholesaler-distributors	Prospects limited by external trends	-10.23%	15	25	<b>0.1</b>	66.67%	10	0.09
4153 Used motor vehicle parts and accessories wholesaler-distributors	Prospects limited by external trends	-21.14%	15	30	<b>0.1</b>	100.00%	15	0.11
4171 Farm, lawn and garden machinery and equipment wholesaler-distributors	Prospects limited by weak base and external trends	-10.50%	10	15	<b>0.1</b>	50.00%	5	0.05
4191 Wholesale agents and brokers	Prospects limited by weak base and external trends	-18.53%	30	45	<b>0.2</b>	50.00%	15	0.16
4151 Motor vehicle wholesaler-distributors	High priority retention target	3.37%	40	40	<b>0.1</b>	0.00%	-	0.14
4172 Construction, forestry, mining, and industrial machinery, equipment and supplies wholesaler-distributors	High priority retention target	4.94%	150	155	<b>0.6</b>	3.33%	5	0.56
4141 Textile, clothing and footwear wholesaler-distributors	Prospects limited due to weak base and declining competitiveness	15.96%	15	15	<b>0.1</b>	0.00%	-	0.05

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4152 New motor vehicle parts and accessories wholesaler-distributors	Prospects limited due to weak base and declining competitiveness	9.48%	70	30	0.1	-57.14%	-40	0.11
4161 Electrical, plumbing, heating and air-conditioning equipment and supplies wholesaler-distributors	Prospects limited due to weak base and declining competitiveness	8.36%	45	45	0.2	0.00%	-	0.16
4173 Computer and communications equipment and supplies wholesaler-distributors	Prospects limited due to weak base and declining competitiveness	0.93%	75	35	0.1	-53.33%	-40	0.13
4144 Personal goods wholesaler-distributors	Prospects limited overall	-2.50%	10	0	0.0	-100.00%	-10	-
4111 Farm product wholesaler-distributors	<b>No basis for Evaluation</b>	-11.44%	0	0	0.0	na	-	-
4132 Beverage wholesaler-distributors	<b>No basis for Evaluation</b>	88.83%	0	0	0.0	na	-	-
4133 Cigarette and tobacco product wholesaler-distributors	<b>No basis for Evaluation</b>	-7.29%	0	0	0.0	na	-	-
4142 Home entertainment equipment and household appliance wholesaler-distributors	<b>No basis for Evaluation</b>	-0.55%	0	0	0.0	na	-	-
4143 Home furnishings wholesaler-distributors	<b>No basis for Evaluation</b>	-0.52%	0	0	0.0	na	-	-
4145 Pharmaceuticals, toiletries, cosmetics and sundries wholesaler-distributors	<b>No basis for Evaluation</b>	28.27%	0	0	0.0	na	-	-
4162 Metal service centres	<b>No basis for Evaluation</b>	10.81%	0	10	0.0	na	10	0.04
4163 Lumber, millwork, hardware and other building supplies wholesaler-distributors	<b>No basis for Evaluation</b>	12.83%	0	100	0.4	na	100	0.36
4183 Agricultural supplies wholesaler-distributors	<b>No basis for Evaluation</b>	13.16%	0	0	0.0	na	-	-

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<b>31-33 Manufacturing</b>	<b>Prospects limited by weak base and external trends</b>	<b>-9.15%</b>	<b>1,870</b>	<b>1,820</b>	<b>6.5</b>	<b>-2.67%</b>	<b>50</b>	<b>6.52</b>
3273 Cement and concrete product manufacturing	Current Strength	17.90%	30	55	<b>0.2</b>	83.33%	25	0.20
3323 Architectural and structural metals manufacturing	Current Strength	16.63%	110	140	<b>0.5</b>	27.27%	30	0.50
3261 Plastic product manufacturing	Emerging Strength	1.88%	60	85	<b>0.3</b>	41.67%	25	0.30
3371 Household and institutional furniture and kitchen cabinet manufacturing	Emerging Strength	4.32%	10	20	<b>0.1</b>	100.00%	10	0.07
3132 Fabric mills	Prospects limited by external trends	-24.71%	235	205	<b>0.7</b>	-12.77%	-30	0.73
3252 Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	Prospects limited by external trends	-34.18%	50	105	<b>0.4</b>	110.00%	55	0.38
3262 Rubber product manufacturing	Prospects limited by external trends	-1.32%	85	90	<b>0.3</b>	5.88%	5	0.32
3322 Cutlery and hand tool manufacturing	Prospects limited by external trends	-24.92%	10	10	<b>0.0</b>	0.00%	-	0.04
3327 Machine shops, turned product, and screw, nut and bolt manufacturing	Prospects limited by external trends	-4.18%	35	125	<b>0.4</b>	257.14%	90	0.45
3329 Other fabricated metal product manufacturing	Prospects limited by external trends	-14.33%	40	75	<b>0.3</b>	87.50%	35	0.27
3359 Other electrical equipment and component manufacturing	Prospects limited by external trends	-54.79%	55	25	<b>0.1</b>	-54.55%	-30	0.09
3366 Ship and boat building	Prospects limited by external trends	-4.40%	35	35	<b>0.1</b>	0.00%	-	0.13
3152 Cut and sew clothing manufacturing	Prospects limited by weak base and external trends	-34.88%	10	15	<b>0.1</b>	50.00%	5	0.05
3211 Sawmills and wood preservation	Prospects limited by weak base and external trends	-18.42%	10	15	<b>0.1</b>	50.00%	5	0.05

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3231 Printing and related support activities	Prospects limited by weak base and external trends	-5.82%	55	55	<b>0.2</b>	0.00%	-	0.20
3335 Metalworking machinery manufacturing	Prospects limited by weak base and external trends	-4.20%	10	10	<b>0.0</b>	0.00%	-	0.04
3341 Computer and peripheral equipment manufacturing	Prospects limited by weak base and external trends	-50.77%	10	20	<b>0.1</b>	100.00%	10	0.07
3118 Bakeries and tortilla manufacturing	Prospects limited due to weak base and declining competitiveness	0.18%	45	45	<b>0.2</b>	0.00%	-	0.16
3119 Other food manufacturing	Prospects limited due to weak base and declining competitiveness	4.78%	10	0	<b>0.0</b>	-100.00%	- 10	-
3161 Leather and hide tanning and finishing	Prospects limited due to weak base and declining competitiveness	18.46%	10	0	<b>0.0</b>	-100.00%	- 10	-
3219 Other wood product manufacturing	Prospects limited due to weak base and declining competitiveness	0.38%	40	20	<b>0.1</b>	-50.00%	- 20	0.07
3314 Non-ferrous metal (except aluminum) production and processing	Prospects limited due to weak base and declining competitiveness	0.25%	15	0	<b>0.0</b>	-100.00%	- 15	-
3353 Electrical equipment manufacturing	Prospects limited due to weak base and declining competitiveness	7.95%	30	0	<b>0.0</b>	-100.00%	- 30	-
3391 Medical equipment and supplies manufacturing	Prospects limited due to weak base and declining competitiveness	7.98%	10	0	<b>0.0</b>	-100.00%	- 10	-
3259 Other chemical product manufacturing	Prospects limited by external trends & declining competitiveness	-22.23%	150	115	<b>0.4</b>	-23.33%	- 35	0.41
3331 Agricultural, construction and mining machinery manufacturing	Prospects limited by external trends & declining competitiveness	-7.31%	335	295	<b>1.1</b>	-11.94%	- 40	1.06

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3332 Industrial machinery manufacturing	Prospects limited by external trends & declining competitiveness	-8.53%	50	45	0.2	-10.00%	-5	0.16
3121 Beverage manufacturing	Prospects limited overall	-5.13%	25	0	0.0	-100.00%	25	-
3141 Textile furnishings mills	Prospects limited overall	-16.81%	10	0	0.0	-100.00%	10	-
3149 Other textile product mills	Prospects limited overall	-10.54%	10	0	0.0	-100.00%	10	-
3212 Veneer, plywood and engineered wood product manufacturing	Prospects limited overall	-6.94%	30	0	0.0	-100.00%	30	-
3221 Pulp, paper and paperboard mills	Prospects limited overall	-30.21%	45	10	0.0	-77.78%	35	0.04
3251 Basic chemical manufacturing	Prospects limited overall	-33.12%	10	0	0.0	-100.00%	10	-
3315 Foundries	Prospects limited overall	-15.33%	10	0	0.0	-100.00%	10	-
3326 Spring and wire product manufacturing	Prospects limited overall	-32.41%	10	0	0.0	-100.00%	10	-
3333 Commercial and service industry machinery manufacturing	Prospects limited overall	-9.65%	10	0	0.0	-100.00%	10	-
3364 Aerospace product and parts manufacturing	Prospects limited overall	-11.63%	105	10	0.0	-90.48%	95	0.04
3399 Other miscellaneous manufacturing	Prospects limited overall	-19.17%	75	20	0.1	-73.33%	55	0.07
3111 Animal food manufacturing	<b>No basis for Evaluation</b>	-12.60%	0	0	0.0	na	-	-
3112 Grain and oilseed milling	<b>No basis for Evaluation</b>	-33.50%	0	0	0.0	na	-	-
3113 Sugar and confectionery product manufacturing	<b>No basis for Evaluation</b>	1.72%	0	0	0.0	na	-	-
3114 Fruit and vegetable preserving and specialty food manufacturing	<b>No basis for Evaluation</b>	-0.59%	0	0	0.0	na	-	-
3115 Dairy product manufacturing	<b>No basis for Evaluation</b>	-2.16%	0	0	0.0	na	-	-
3116 Meat product manufacturing	<b>No basis for Evaluation</b>	10.07%	0	10	0.0	na	10	0.04
3117 Seafood product preparation and packaging	<b>No basis for Evaluation</b>	14.63%	0	0	0.0	na	-	-
3122 Tobacco manufacturing	<b>No basis for Evaluation</b>	-24.90%	0	0	0.0	na	-	-

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3131 Fibre, yarn and thread mills	No basis for Evaluation	-6.38%	0	0	0.0	na	-	-
3133 Textile and fabric finishing and fabric coating	No basis for Evaluation	-28.27%	0	0	0.0	na	-	-
3151 Clothing knitting mills	No basis for Evaluation	-50.44%	0	0	0.0	na	-	-
3159 Clothing accessories and other clothing manufacturing	No basis for Evaluation	-25.00%	0	0	0.0	na	-	-
3162 Footwear manufacturing	No basis for Evaluation	-48.26%	0	0	0.0	na	-	-
3169 Other leather and allied product manufacturing	No basis for Evaluation	-48.85%	0	0	0.0	na	-	-
3222 Converted paper product manufacturing	No basis for Evaluation	-5.67%	0	0	0.0	na	-	-
3241 Petroleum and coal products manufacturing	No basis for Evaluation	-25.61%	0	0	0.0	na	-	-
3253 Pesticide, fertilizer and other agricultural chemical manufacturing	No basis for Evaluation	-15.55%	0	0	0.0	na	-	-
3254 Pharmaceutical and medicine manufacturing	No basis for Evaluation	15.58%	0	0	0.0	na	-	-
3255 Paint, coating and adhesive manufacturing	No basis for Evaluation	1.02%	0	0	0.0	na	-	-
3256 Soap, cleaning compound and toilet preparation manufacturing	No basis for Evaluation	1.47%	0	0	0.0	na	-	-
3271 Clay product and refractory manufacturing	No basis for Evaluation	-25.38%	0	10	0.0	na	10	0.04
3272 Glass and glass product manufacturing	No basis for Evaluation	-19.66%	0	0	0.0	na	-	-
3274 Lime and gypsum product manufacturing	No basis for Evaluation	-8.56%	0	0	0.0	na	-	-
3279 Other non-metallic mineral product manufacturing	No basis for Evaluation	-6.75%	0	25	0.1	na	25	0.09
3311 Iron and steel mills and ferro-alloy manufacturing	No basis for Evaluation	-19.88%	0	0	0.0	na	-	-

Sectors (NAICS)	Industry Targeting	Employment Growth Ontario	# jobs '01 North Bay C	# jobs '06 North Bay C	% of total Labour Force	Employment Growth North Bay C	Actual Change (# jobs) North Bay C	% Employment North Bay C 2006
3312 Steel product manufacturing from purchased steel	No basis for Evaluation	-7.85%	0	25	0.1	na	25	0.09
3313 Alumina and aluminum production and processing	No basis for Evaluation	-21.26%	0	0	0.0	na	-	-
3321 Forging and stamping	No basis for Evaluation	3.20%	0	0	0.0	na	-	-
3324 Boiler, tank and shipping container manufacturing	No basis for Evaluation	-20.97%	0	0	0.0	na	-	-
3325 Hardware manufacturing	No basis for Evaluation	-16.75%	0	0	0.0	na	-	-
3328 Coating, engraving, heat treating and allied activities	No basis for Evaluation	-7.79%	0	25	0.1	na	25	0.09
3334 Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	No basis for Evaluation	-2.56%	0	0	0.0	na	-	-
3336 Engine, turbine and power transmission equipment manufacturing	No basis for Evaluation	-32.80%	0	0	0.0	na	-	-
3339 Other general-purpose machinery manufacturing	No basis for Evaluation	-8.50%	0	10	0.0	na	10	0.04
3342 Communications equipment manufacturing	No basis for Evaluation	-23.66%	0	0	0.0	na	-	-
3343 Audio and video equipment manufacturing	No basis for Evaluation	-40.43%	0	0	0.0	na	-	-
3344 Semiconductor and other electronic component manufacturing	No basis for Evaluation	-24.35%	0	10	0.0	na	10	0.04
3345 Navigational, measuring, medical and control instruments manufacturing	No basis for Evaluation	-0.79%	0	10	0.0	na	10	0.04
3346 Manufacturing and reproducing magnetic and optical media	No basis for Evaluation	-4.25%	0	10	0.0	na	10	0.04
3351 Electric lighting equipment manufacturing	No basis for Evaluation	-31.01%	0	0	0.0	na	-	-
3352 Household appliance manufacturing	No basis for Evaluation	-27.44%	0	0	0.0	na	-	-
3361 Motor vehicle manufacturing	No basis for Evaluation	4.03%	0	0	0.0	na	-	-

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Sectors (NAICS)	Industry Targeting	Employment Growth Ontario	# jobs '01 North Bay C	# jobs '06 North Bay C	% of total Labour Force	Employment Growth North Bay C	Actual Change (# jobs) North Bay C	% Employment North Bay C 2006
3362 Motor vehicle body and trailer manufacturing	<b>No basis for Evaluation</b>	-5.21%	0	0	<b>0.0</b>	na	-	-
3363 Motor vehicle parts manufacturing	<b>No basis for Evaluation</b>	-6.57%	0	0	<b>0.0</b>	na	-	-
3365 Railroad rolling stock manufacturing	<b>No basis for Evaluation</b>	-16.83%	0	0	<b>0.0</b>	na	-	-
3369 Other transportation equipment manufacturing	<b>No basis for Evaluation</b>	320.83%	0	0	<b>0.0</b>	na	-	-
3372 Office furniture (including fixtures) manufacturing	<b>No basis for Evaluation</b>	-12.21%	0	0	<b>0.0</b>	na	-	-
3379 Other furniture-related product manufacturing	<b>No basis for Evaluation</b>	-12.06%	0	0	<b>0.0</b>	na	-	-
<b>51 Information and cultural industries</b>	<b>Prospects limited by weak base and external trends</b>	<b>-0.43%</b>	<b>545</b>	<b>560</b>	<b>2.0</b>	<b>2.75%</b>	<b>15</b>	<b>2.01</b>
5131 Radio and television broadcasting	Current Strength	29.08%	40	75	<b>0.3</b>	87.50%	35	0.27
5132 Pay TV, specialty TV and program distribution	Emerging Strength	27.06%	10	25	<b>0.1</b>	150.00%	15	0.09
5133 Telecommunications	Prospects limited by external trends	-18.15%	180	225	<b>0.8</b>	25.00%	45	0.81
5142 Data processing services	Prospects limited due to weak base and declining competitiveness	2.03%	35	0	<b>0.0</b>	-100.00%	- 35	-
5110 Newspaper, periodical, book and database publishers	Prospects limited overall	-4.54%	285	195	<b>0.7</b>	-31.58%	- 90	0.70
5121 Motion picture and video industries	<b>No basis for Evaluation</b>	<b>4.49%</b>	0	40	<b>0.1</b>	<b>na</b>	<b>40</b>	<b>0.14</b>
5122 Sound recording industries	<b>No basis for Evaluation</b>	-6.59%	0	0	<b>0.0</b>	na	-	-
<b>44-45 Retail trade</b>	<b>High priority retention target</b>	<b>5.62%</b>	<b>4,255</b>	<b>4,270</b>	<b>15.3</b>	<b>0.35%</b>	<b>15</b>	<b>15.30</b>
4412 Other motor vehicle dealers	Current Strength	17.47%	25	45	<b>0.2</b>	80.00%	20	0.16
4422 Home furnishings stores	Current Strength	18.93%	60	95	<b>0.3</b>	58.33%	35	0.34
4441 Building material and supplies dealers	Current Strength	22.05%	160	240	<b>0.9</b>	50.00%	80	0.86

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4451 Grocery stores	Current Strength	5.02%	745	800	<b>2.9</b>	7.38%	55	2.87
4483 Jewellery, luggage and leather goods stores	Current Strength	5.34%	30	115	<b>0.4</b>	283.33%	85	0.41
4511 Sporting goods, hobby and musical instrument stores	Current Strength	6.19%	100	115	<b>0.4</b>	15.00%	15	0.41
4521 Department stores	Current Strength	6.57%	430	645	<b>2.3</b>	50.00%	215	2.31
4531 Florists	Current Strength	7.34%	50	90	<b>0.3</b>	80.00%	40	0.32
4471 Gasoline stations	Prospects limited by external trends	-8.19%	85	185	<b>0.7</b>	117.65%	100	0.66
4512 Book, periodical and music stores	Prospects limited by weak base and external trends	-3.92%	20	20	<b>0.1</b>	0.00%	-	0.07
4411 Automobile dealers	High priority retention target	17.70%	430	395	<b>1.4</b>	-8.14%	35	1.42
4413 Automotive parts, accessories and tire stores	High priority retention target	13.72%	70	60	<b>0.2</b>	-14.29%	10	0.21
4421 Furniture stores	High priority retention target	19.38%	90	90	<b>0.3</b>	0.00%	-	0.32
4431 Electronics and appliance stores	High priority retention target	2.83%	155	115	<b>0.4</b>	-25.81%	40	0.41
4452 Specialty food stores	High priority retention target	3.60%	115	110	<b>0.4</b>	-4.35%	5	0.39
4453 Beer, wine and liquor stores	High priority retention target	3.27%	55	40	<b>0.1</b>	-27.27%	15	0.14
4481 Clothing stores	High priority retention target	9.45%	355	305	<b>1.1</b>	-14.08%	50	1.09
4482 Shoe stores	High priority retention target	3.82%	60	60	<b>0.2</b>	0.00%	-	0.21
4529 Other general merchandise stores	High priority retention target	8.10%	245	200	<b>0.7</b>	-18.37%	45	0.72
4461 Health and personal care stores	Prospects limited due to weak base and declining competitiveness	4.61%	275	195	<b>0.7</b>	-29.09%	80	0.70
4442 Lawn and garden equipment and supplies stores	Prospects limited by external trends & declining competitiveness	-11.49%	70	50	<b>0.2</b>	-28.57%	20	0.18

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4532 Office supplies, stationery and gift stores	Prospects limited by external trends & declining competitiveness	-8.27%	175	120	<b>0.4</b>	-31.43%	-55	0.43
4533 Used merchandise stores	Prospects limited by external trends & declining competitiveness	-3.19%	85	65	<b>0.2</b>	-23.53%	-20	0.23
4543 Direct selling establishments	Prospects limited by external trends & declining competitiveness	-19.75%	80	45	<b>0.2</b>	-43.75%	-35	0.16
4539 Other miscellaneous store retailers	Prospects limited overall	-8.84%	60	50	<b>0.2</b>	-16.67%	-10	0.18
4541 Electronic shopping and mail-order houses	<b>Prospects limited overall</b>	<b>-29.16%</b>	225	10	<b>0.0</b>	<b>-95.56%</b>	<b>215</b>	<b>0.04</b>
4542 Vending machine operators	<b>No basis for Evaluation</b>	-11.08%	0	0	<b>0.0</b>	na	-	-
<b>62 Health care and social assistance</b>	<b>High priority retention target</b>	<b>14.57%</b>	<b>3,690</b>	<b>4,175</b>	<b>15.0</b>	<b>13.14%</b>	<b>485</b>	<b>14.96</b>
6212 Offices of dentists	Current Strength	17.65%	120	145	<b>0.5</b>	20.83%	25	0.52
6213 Offices of other health practitioners	Current Strength	18.40%	215	255	<b>0.9</b>	18.60%	40	0.91
6214 Out-patient care centres	Current Strength	10.30%	220	295	<b>1.1</b>	34.09%	75	1.06
6241 Individual and family services	Current Strength	30.34%	315	515	<b>1.8</b>	63.49%	200	1.85
6243 Vocational rehabilitation services	Current Strength	19.80%	15	60	<b>0.2</b>	300.00%	45	0.21
6220 Hospitals (6221 to 6223)	High priority retention target	14.36%	1,420	1,480	<b>5.3</b>	4.23%	60	5.30
6230 Nursing and residential care facilities (6231 to 6239)	High priority retention target	23.38%	565	665	<b>2.4</b>	17.70%	100	2.38
6244 Child day-care services	High priority retention target	1.53%	370	370	<b>1.3</b>	0.00%	-	1.33
6215 Medical and diagnostic laboratories	Prospects limited due to weak base and declining competitiveness	32.25%	30	15	<b>0.1</b>	-50.00%	-15	0.05
6219 Other ambulatory health care services	Prospects limited due to weak base and declining competitiveness	36.00%	20	10	<b>0.0</b>	-50.00%	-10	0.04

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6242 Community food and housing, and emergency and other relief services	Prospects limited due to weak base and declining competitiveness	33.33%	10	0	0.0	-100.00%	-10	-
6211 Offices of physicians	Prospects limited by external trends & declining competitiveness	-2.03%	270	260	0.9	-3.70%	-10	0.93
6216 Home health care services	Prospects limited by external trends & declining competitiveness	-3.92%	110	95	0.3	-13.64%	15	0.34
<b>91 Public administration</b>	<b>High priority retention target</b>	<b>13.39%</b>	<b>2,635</b>	<b>2,565</b>	<b>9.2</b>	<b>-2.66%</b>	<b>70</b>	<b>9.19</b>
9141 Aboriginal public administration	Current Strength	12.98%	10	25	0.1	150.00%	15	0.09
9111 Defence services	High priority retention target	24.99%	610	615	2.2	0.82%	5	2.20
9120 Provincial and territorial public administration (9121 to 9129)	High priority retention target	11.40%	1,130	1,240	4.4	9.73%	110	4.44
9130 Local, municipal and regional public administration (9131 to 9139)	High priority retention target	12.63%	660	520	1.9	-21.21%	140	1.86
9112 Other federal services (9112 to 9119)	Prospects limited due to weak base and declining competitiveness	12.33%	235	170	0.6	-27.66%	65	0.61
9191 International and other extra-territorial public administration	<b>No basis for Evaluation</b>	2.54%	0	0	0.0	na	-	-
<b>61 Educational services</b>	<b>High priority retention target</b>	<b>13.95%</b>	<b>2,420</b>	<b>2,520</b>	<b>9.0</b>	<b>4.13%</b>	<b>100</b>	<b>9.03</b>
6111 Elementary and secondary schools	High priority retention target	9.76%	1,515	1,610	5.8	6.27%	95	5.77
6112 Community colleges and C.E.G.E.P.s	High priority retention target	12.28%	455	405	1.5	-10.99%	50	1.45
6113 Universities	High priority retention target	25.57%	320	360	1.3	12.50%	40	1.29
6116 Other schools and instruction	High priority retention target	30.21%	90	115	0.4	27.78%	25	0.41
6114 Business schools and computer and management training	Prospects limited due to weak base and declining competitiveness	3.57%	25	10	0.0	-60.00%	15	0.04

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6117 Educational support services	Prospects limited due to weak base and declining competitiveness	55.67%	10	0	0.0	-100.00%	-10	-
6115 Technical and trade schools	<b>No basis for Evaluation</b>	-12.05%	0	20	0.1	na	20	0.07
<b>23 Construction</b>	<b>High priority retention target</b>	<b>8.15%</b>	<b>755</b>	<b>685</b>	<b>2.5</b>	<b>-9.27%</b>	<b>70</b>	<b>2.45</b>
2300 Construction	High priority retention target	8.18%	755	675	2.4	-10.60%	80	2.42
2213 Water, sewage and other systems	Current Strength	17.97%	25	40	0.1	60.00%	15	0.14
<b>22 Utilities</b>	<b>High priority retention target</b>	<b>4.60%</b>	<b>295</b>	<b>245</b>	<b>0.9</b>	<b>-16.95%</b>	<b>50</b>	<b>0.88</b>
2211 Electric power generation, transmission and distribution	High priority retention target	1.45%	160	130	0.5	-18.75%	30	0.47
2212 Natural gas distribution	High priority retention target	10.73%	105	75	0.3	-28.57%	30	0.27
<b>52 Finance and insurance</b>	<b>Prospects limited due to weak base and declining competitiveness</b>	<b>7.62%</b>	<b>975</b>	<b>780</b>	<b>2.8</b>	<b>-20.00%</b>	<b>195</b>	<b>2.79</b>
5222 Non-depository credit intermediation	Emerging Strength	24.94%	25	50	0.2	100.00%	25	0.18
5231 Securities and commodity contracts intermediation and brokerage	<b>Prospects limited by weak base and external trends</b>	<b>-2.35%</b>	40	55	0.2	<b>37.50%</b>	<b>15</b>	<b>0.20</b>
5221 Depository credit intermediation	Prospects limited due to weak base and declining competitiveness	7.85%	390	355	1.3	-8.97%	35	1.27
5239 Other financial investment activities	Prospects limited due to weak base and declining competitiveness	2.03%	115	70	0.3	-39.13%	45	0.25
5241 Insurance carriers	Prospects limited due to weak base and declining competitiveness	3.29%	115	105	0.4	-8.70%	10	0.38

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5242 Agencies, brokerages and other insurance related activities	Prospects limited due to weak base and declining competitiveness	9.01%	275	120	<b>0.4</b>	-56.36%	-155	0.43
5269 Other funds and financial vehicles	Prospects limited overall	-10.35%	10	0	<b>0.0</b>	-100.00%	10	-
5211 Monetary authorities - central bank	<b>No basis for Evaluation</b>	9.35%	0	10	<b>0.0</b>	na	10	0.04
5223 Activities related to credit intermediation	<b>No basis for Evaluation</b>	124.06%	0	25	<b>0.1</b>	na	25	0.09
5232 Securities and commodity exchanges	<b>No basis for Evaluation</b>	-22.37%	0	0	<b>0.0</b>	na	-	-
5261 Pension funds	<b>No basis for Evaluation</b>	-9.41%	0	0	<b>0.0</b>	na	-	-
<b>71 Arts, entertainment and recreation</b>	<b>Prospects limited due to weak base and declining competitiveness</b>	<b>13.60%</b>	<b>320</b>	<b>335</b>	<b>1.2</b>	<b>4.69%</b>	<b>15</b>	<b>1.20</b>
7139 Other amusement and recreation industries	Current Strength	20.65%	165	245	<b>0.9</b>	48.48%	80	0.88
7111 Performing arts companies	Prospects limited by weak base and external trends	-3.80%	10	10	<b>0.0</b>	0.00%	-	0.04
7113 Promoters (presenters) of performing arts, sports and similar events	Prospects limited due to weak base and declining competitiveness	6.85%	10	0	<b>0.0</b>	-100.00%	10	-
7115 Independent artists, writers and performers	Prospects limited due to weak base and declining competitiveness	9.10%	40	20	<b>0.1</b>	-50.00%	20	0.07
7131 Amusement parks and arcades	Prospects limited due to weak base and declining competitiveness	9.65%	30	0	<b>0.0</b>	-100.00%	30	-
7132 Gambling industries	Prospects limited due to weak base and declining competitiveness	12.44%	45	40	<b>0.1</b>	-11.11%	5	0.14
7112 Spectator sports	Prospects limited overall	-6.39%	15	10	<b>0.0</b>	-33.33%	5	0.04

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7114 Agents and managers for artists, athletes, entertainers and other public figures	<b>No basis for Evaluation</b>	1.16%	0	0	<b>0.0</b>	na	-	-
7121 Heritage institutions	<b>No basis for Evaluation</b>	22.73%	0	0	<b>0.0</b>	na	-	-
<b>55 Management of companies and enterprises</b>	<b>Prospects limited due to weak base and declining competitiveness</b>	<b>2.53%</b>	<b>40</b>	<b>20</b>	<b>0.1</b>	<b>-50.00%</b>	<b>-20</b>	<b>0.07</b>
5511 Management of companies and enterprises	Prospects limited due to weak base and declining competitiveness	2.53%	45	20	<b>0.1</b>	-55.56%	-25	0.07
<b>11 Agriculture, forestry, fishing and hunting</b>	<b>Prospects limited overall</b>	<b>-9.18%</b>	<b>85</b>	<b>35</b>	<b>0.1</b>	<b>-58.82%</b>	<b>-50</b>	<b>0.13</b>
1153 Support activities for forestry	Prospects limited by external trends & declining competitiveness	-7.05%	60	20	<b>0.1</b>	-66.67%	-40	0.07
1110 Farms (1111 to 1129)	Prospects limited overall	-10.34%	20	0	<b>0.0</b>	-100.00%	-20	-
1133 Logging	Prospects limited overall	-1.98%	10	0	<b>0.0</b>	-100.00%	10	-
1131 Timber tract operations	<b>No basis for Evaluation</b>	-59.26%	0	0	<b>0.0</b>	na	-	-
1132 Forest nurseries and gathering of forest products	<b>No basis for Evaluation</b>	45.10%	0	0	<b>0.0</b>	na	-	-
1141 Fishing	<b>No basis for Evaluation</b>	<b>12.40%</b>	0	0	<b>0.0</b>	na	-	-
1142 Hunting and trapping	<b>No basis for Evaluation</b>	-47.22%	0	0	<b>0.0</b>	na	-	-
1150 Support activities for farms (1151 to 1152)	<b>No basis for Evaluation</b>	24.48%	0	0	<b>0.0</b>	na	-	-